

PETRA ACCOUNTABILITY COACH SCORECARD

Company: Petra Coach
Position: Accountability Coach
Location: Office & Remote Position
Compensation: Salary + Incentive

WHAT WE DO

Petra Coach leads organizations through implementation of the Petra Process which is rooted in Rockefeller Habits during a 36-48+ month engagement. We facilitate the development of the One Page Strategic Plan, identify annual and quarterly priorities, create a systematic process to execute the priorities, and develop a culture of purpose, alignment, and accountability - and have fun doing it!
The Coach leads members through this process side by side with an Accountability Coach using a process refined by The Petra Team. At our core, we are a MINDSHIFT business.

MISSION OF THE ROLE

The role of the Accountability Coach is work with your Petra Coach to lead organizations through the implementation of the Petra process during a 36 –48-month engagement. You alongside the Coach will development of the One Page Strategic plan, identify annual and quarterly priorities, create systematic processes to execute on these priorities and develop a culture of purpose, alignment and accountably. The ultimate goal is to inspire change 3 layers deep. Head (think), Health (Feel), Who (Change) + 10MHB

Key Criteria/Requirements

- Possess the ability to relate to people both personally and professionally.
- Has an inherent drive. The ability to find a need and fill the need without being asked
- Can flex between the leader role and follower role seamlessly
- Has a general knowledge of business practices
- Demonstrated ability to effectively work with both individuals and teams.
- Has experience inspiring others and can easily command attention to create action.
- Understands the difference in coaching vs consulting.
- Has the ability to see the gaps in business and show others what they don't want to see but need to.

		MAR	Rating	Comments
CORE VALUES				
There is no TRY – Only Do!	We don't make excuses – we make progress. We look at each challenge as a new level of growth that only makes each of us better. Nothing is left undone here, we finish what we start, and we do what we say – we don't try. We also believe that language is important, and you won't catch us using the word TRY in any context.	5		
I've got your back – No matter what!	No one is in it for himself or herself. We sacrifice for one another to achieve more than we can alone and we never seek reward for any of it. All of us will at one time or another will find ourselves in a spot that we truly need another team member and by living this value we always 'know' that a team member will be there.	5		
Please and Thank You – Say it and Mean it!	We recognize the power of appreciation and being nice. We say 'please' when asking and say 'Thank You' when it's deserved – which is often. We use handwritten notes and the spoken word to express these basic levels of respect. We 'seek out' moments that team members perform in a way that we can recognize them, and we act on them.	5		
Everything is an Experience – every time!	We make each interaction an experience. We ask ourselves – How can we add an extra 15% on top of what we have already done that would make someone say 'wow, that was an experience' – 'that was more than I expected' – 'I want to do this again' and then tell others about it. With one another, with our members, with our vendors and even with the mail carrier. Everything is an experience to be remembered and remarked about.	5		
See around the Curves – anticipate needs and 'pre' fill them!	A big part of work involves us seeing what is coming before it arrives. In planning sessions with teams, in traveling via planes, trains and automobiles and as importantly with one another. Far before the moment arrives, we think through what is coming and work to be prepared at a level most would consider overboard. By doing this we are uber prepared and gain the ability to respond with more agility than everyone else. We pay ultra-attention to what is being said and what is not being said in every interaction to 'see' what is coming next.	5		
Be Curious – ask WHY and Improve!	We never feel like we know everything and have arrived. We never accept things as they are. We seek constant improvement in ourselves, in those around us, in our process, in everything. We ask 'Why does it need to be done this way' and seek ways to improve. We never stop as we know when we do – it's over.	5		

KEY TECHNICAL COMPETENCIES				
1	HubSpot CRM – Sales Hub – Pipeline and Funnel systems			
2	Outlook – General Communication Management			
3	Dropbox – Universal Storage and Selection of Materials			
4	Microsoft Office 365 – Word, Power Point, Excel, PDF (Adobe)			
5	Video Communication Competencies – Zoom, Vidyad, Microsoft Teams			

Measurable Accountabilities

KEY PERFORMANCE INDICATORS	METRIC	RATING (A/B/C)	COMMENTS
Performance in the Petra Process	<ul style="list-style-type: none"> -80% of individual priorities in the Green -100% of DH/WH attended - Top tasks loaded/completed weekly - 80% green Top Priority calendar - PA/PU & Ascent Attended - 90 Minute Habit Workshop and webinar attended (watched) 		
Member Engagement The ability to keep your members quarter over quarter	<ul style="list-style-type: none"> < 20% member turnover within the coach and AC's control - Growth Roadmap Progression - All Everest/ Kilimanjaro members receive 6 /> Accountability Touches a quarter and are logged in Olympus -All Rainer members receive 2 /> Accountability Touches a quarter and are logged in Olympus -All travel booked 3 weeks from planning -All Olympus Fields are Updated and Accurate - Thank You Cards sent after all kickoffs - Anniversary & KO cards mailed to members - Pre, Post and Mid Quarter Alignment calls logged in Olympus 		
Petra Planning Day & Outcomes AC and Coach work together to ensure all members have full plans built in the planning day	<ul style="list-style-type: none"> - All members have company priorities and individual priority titles in Align at every planning session. - Growth Roadmap Maintained - 8.5 or higher average on all member scorecards - All members have rolling dates confirmed for 3 quarters and loaded into Olympus - Recap sent within 24 hours after planning - Coach Evaluation completed and reviewed within 1 week of planning - Expenses submitted within 1 week of planning 		
Professional Development The ability to grow your skill and take on more complex members	<ul style="list-style-type: none"> - Submits 100 points of Better Book Club reports each quarter -Shadow 4 other Accountability coaches annually - Attend 12 forum groups (Department and/or Member Leader) - Shadow 20 AC Check-in Calls annually - DiSC Certified 		
Evaluations & Reviews	<ul style="list-style-type: none"> - Average of 8 on Core Value scores on Annual reviews 		

Rating Scale: **A – Can predictably meet or exceed expectations**

B – Will predictably fall somewhat short of expectations

Key Competencies

- Resourcefulness
- Results-Oriented
- Excellence
- Independence/
Entrepreneurial
- First Impression
- Likeability
- Listening
- Relationship Building
- Communications
- Negotiation
- Persuasion
- Ambition
- Tenacity

Full List of Competencies

Rating Scale: 4 = Very Good 3 = Good 2 = Only Fair 1 = Weak MAR – Minimum Acceptable Rating			
Ease of Changing Competency: Difficult Hard, But Doable Easy			

Competency	Definition	MAR	Your Rating	Comments
INTELLECTUAL				
Intelligence	Ability to acquire understanding & absorb information rapidly. A quick study. A clear and agile thinker; quick on their feet. Handles objections quickly and effectively.	4		
Analysis Skills	Identifies significant problems & opportunities. Analyzes problems and people in depth. Sorts the wheat from the chaff, determining root cause.	4		
Judgment/Decision Making	Consistent logic, rationality & objectivity in decision making. Neither indecisive nor hip shooter.	3		
Creativity	Generates new approaches to problems or innovations to established best practices. Shows imagination			
Strategic Skills	Determines opportunities & threats through comprehensive analysis of current & future trends. Comprehends the big picture.	4		
Forward-thinking	Preempts problems. Anticipates future issues and works to contain them before they become problems.	4		
Risk Taking	Takes calculated risks, with generally favorable outcomes. Does not “bet the farm.”	3		
Leading Edge	Constantly benchmarks best practices and expects others to do the same	4		
PERSONAL				
Integrity	Iron clad. Does not ethically cut corners. Earns trust of co-workers. Puts organization above self-interests.	4		
Resourcefulness/ Initiative	Passionately finds ways over, around, or through barriers to success. Achieves results despite lack of resources. Goes beyond the call of duty.	4		
Organization/ Planning	Plans, organizes, & schedules in efficient, organized manner. Focuses on key priorities	4		
Excellence	Sets high stretch standards of performance for self and others. Low tolerance for mediocrity. High sense of responsibility.	4		
Independence/ Entrepreneurial	Able to deliver results without a lot of direction. Versatile. Willingness to take an independent stand.	4		
Stress Management	Stable & poised under pressure.	4		
Self-Awareness/ Feedback	Recognizes own strengths & weaknesses. Not defensive. Does not rationalize mistakes or blame others. Uses feedback mechanisms.	4		
Adaptability	Not rigid. Copes effectively with complexity and change. Resilient. Does not take “no” personally.	4		
INTERPERSONAL				
First Impression	Professional in demeanor. Creates favorable first impression – body, language, eye contact, posture, etc.	4		



Likability	Puts people at ease. Shows Emotional Intelligence. Warm, sensitive, compassionate. Not arrogant. Friendly, sense of humor, genuine.	4		
Listening	Tunes in accurately to opinions, feelings, and needs of people. Empathetic. Patient. Let's others speak. Listens actively.	4		
Relationship Builder	Establishes partner relationship with clients. Visible & accessible to clients. Interacts effectively with executives, human resources, and brokers.	4		
Communications – Oral	Communicates well one on one, in small groups and public speaking. Fluent, quick on feet, command of language. Keeps people informed.	4		
Communications – Written	Writes clear, precise, well-organized documents using appropriate vocabulary, grammar & word usage.	4		
MOTIVATIONAL				
Energy/Drive	Exhibits energy, strong desire to achieve, high dedication level.	4		
Enthusiasm/Passion	Exhibits dynamism, excitement, and a positive can-do attitude. Passionate about making clients' lives easier, saving them money, and helping Petra Coach reach its goals.	4		
Ambition	UPDATE THE DEFINITION	3		
Compatibility of Needs	Willing and able to do relationship building activities with prospects and salespeople outside of normal business hours (breakfasts, dinners, weekends).	3		
Tenacity	Consistent reward of passionately striving to achieve results. Conveys strong need to win. Reputation for not giving up.	3		

