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30.01.2026

MANAGER COACH | PART 01

THE FUNDAMENTALS

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RETAIL EXCELLENCE ACADEMY

Agenda

1. The Fundamentals — PART 01

- Leadership and Management
- What is "Coaching"
- Coaching, motivation and change
- Coaching and relationship
- Coaching and performance

2. Area Manager: Expected Behaviours — PART 02

3. MENTOR | Coaching Model — PART 03

- **M**apping the Baseline
- **E**xploring Root Causes
- **N**avigating the Journey
- **T**ransparent Objectives

PART 04

- **O**n-the-Job Execution
- **R**eview and Relaunch

4. Final Role-Play — PART 05

💡**This programme translates the Area Manager role into daily field routines: commercial follow-up, performance visits, maturity checks and weekly meetings.**

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Leadership and Management

Leadership

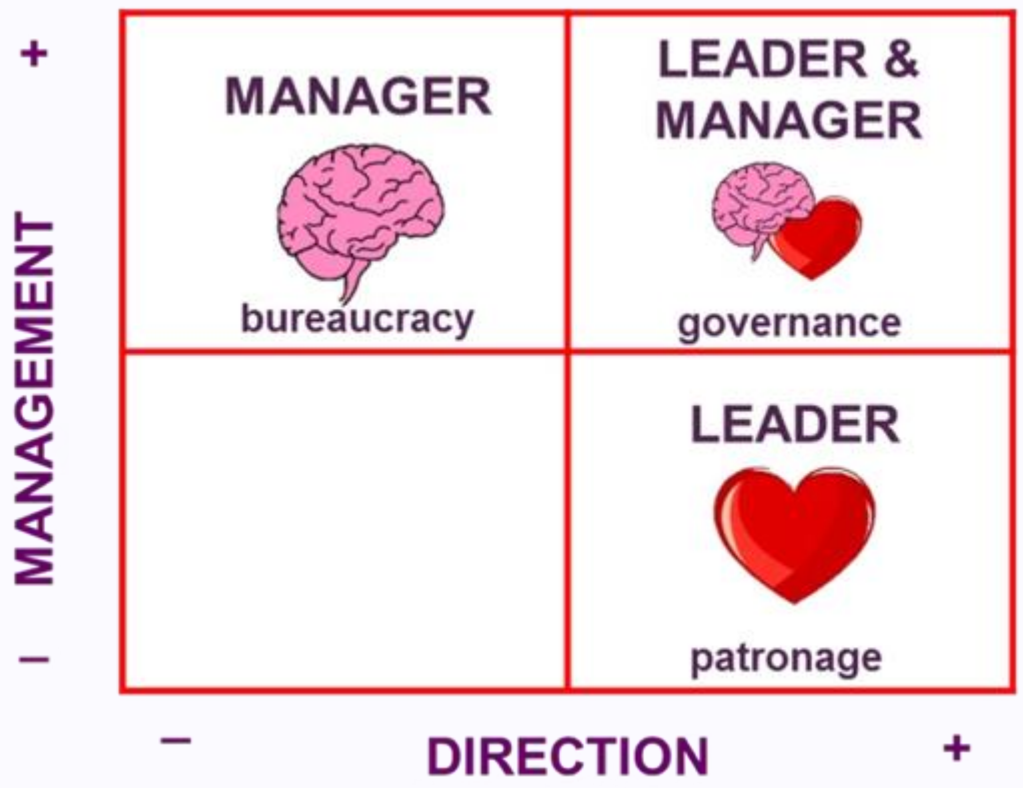
Effectively influencing behaviours

Management

A particular aspect of the Leadership process that attributes primary importance to the achievement of the organisation's objectives

Leadership vs Management Matrix

Understanding the four leadership style



Manager

Focuses on processes, structure and control. High management, low direction. Risk: bureaucracy.

Leader & Manager

Combines strategic vision with operational discipline. The ideal balance: governance.

Leader

Inspires and motivates through relationships. High direction, low management. Risk: patronage.

💡**For a SYNLAB Area Manager, Leadership & Management happens in the field: through visits, observation, feedback, and action planning.**

What is "Coaching"?

Huck

Supporting actions that help to test ideas, actions and values, in order to increase performance and personal satisfaction

Da Geissler

It is a process where the protagonist is the Coachee, on whom all the Coach's activities converge: consulting, assistance, support, comparison, training and action

Da John Whitmore

"Coaching enables a person to unlock their potential to maximise their own performance and helps them to learn"

🔲 Exercise 1: What is "Coaching”… for You?

What Coaching IS and What It Is NOT

Coaching is NOT

A technique or an infallible remedy...

Coaching is not inspection

Coaching IS

A complete set of behaviours of someone who:

Asks before speaking

Listens before speaking

Strengthens before directing

💡in practice, coaching means observing real patient interactions, giving structured feedback, and helping site teams turn protocol into habit. it is field support aimed at performance and habit-building

Coaching, Motivation and Change

We want to create leaders and managers: to achieve this goal, coaching is an essential tool.

The manager should work on: Motivation (M) and Capability (C) to reach Results (R)

$$R = M \times C^2$$

Motivation

The internal drive that enables any process of change and learning

Capability

The skills and competencies required to perform and grow

Coaching, Motivation and Change

Motivation

Motivation is essential for undertaking any process of change and learning!

Motivation comes from within, it cannot be provided from the outside and is essential for undertaking any process of change and learning.

Coaching, Motivation and Change

Coaching, Motivation and Change (4 Steps)

Refusal
Resist change; emotional response

Passive Acceptance
Comply without engagement

Acceptance
Understand and adopt change

Adhesion
Commit and integrate fully

1	2	3	4
Phase of "Refusal" • Move to a **rational** level • Induce reflection on **success cases** • Focus on **small clusters** to apply the change	Phase of "Passive Acceptance" • Increase the number of **side-by-side sessions** • Support the site team member in the **application** of the model • Ask the site team member for **success cases**	Phase of "Acceptance": change • In side-by-side sessions, apply the method to **difficult cases** • Help the site team member to **share their own success cases**	Phase of "Adhesion" • Evaluate the opportunity to send the reference site team member on a **side-by-side assignment** • Use him/her as a speaker in **peer-to-peer** situations

💡**A field visit should adapt to the site team members stage of change**

4 Transition Phases

1. Stage of "**Rejection**"

- The changement starts with **denial**: ***"I always work in this way… why I have to do this?"***
- This stage gets to **resistence**: ***"It's impossibile to apply this to my situation… it will never work!"***

TIPS

1. Manage the negative emotion of site team member and don't be contaminate by it
2. Move the conversation on rational level
3. Induce to reflect about success cases ***(How many real customers do you have?)*** and create the ***"anchor"***
4. "Nobody is perfect" technique (or Leonardo technique)… Cluster
5. Focalize in small cluster and apply the change

The impacted population has to experience success and feel the benefit of the new system quickly

4 Transition Phases

2. Stage of **"Passive acceptance"**

- This second stage is the most dangerous step of changement, as the leader see, after the resistence, a **formal acceptance** of required new beahiviour.
- ***"They say to me to do that, I'll do..."***

TIPS

1. **Increase number of double calls**
2. **Support the site team member in application of the model**
3. **Ask to the site team member about success cases**

Increase the energy by giving support

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4 Transition Phases

3. Stage of **"Acceptance": change**

- This stage normally starts with a phase of **Exploration**: ***"OK, maybe this can work".***
- Pay attention, because **difficulties** could push people to consider the old and safest ways to do..

TIPS

1. **In double call work on difficult cases and apply the method**
2. **Help the site team member to share during the cycle meeting his/her own success cases**

Give support on quality

4 Transition Phases

4. Stage of **"Adhesion":**

- This is a sort of New Beginning, it's the phase of **Commitment** where people think: ***"This is how I work now", "This is a better way!"***
- People do not have the desire to return to the old way.

TIPS

1. **Send Advocate site team member (if he/she has a recognized role by the team) in double call**
2. **Use he/she as speaker in pear-to-pear situation and share his/her energy with the team**

Support people to become like a "vocal advocate" for the new way, their new way!

Exercise 2: Mapping Your Team Through Change

Think about your team and, for each team member, write down: **what stage** of the change process they are at and **what you think you are going to do with them** and define: **which visit type will help each person most** (Commercial Follow-up, Performance Visit, Weekly Meeting)

Coaching and Relationship

BIAS IN OBSERVATION

→ Each of us sees the world from **our own perspective** and/or in terms of our own personal advantage

→ Confusing objective reality with our own point of view → **misunderstandings and prejudices**

→ The conflict does not lie in objective reality, **the difference is only in the way of thinking**

The winning weapon, therefore, is being able to see the situation from the interlocutor's point of view (understanding the interlocutor's point of view does not mean sharing it)

The Influence of Feelings

Feelings play an important role throughout the entire negotiation process.

85%	100%
Non-rational decisions	**When personally involved**
In everyday working life, 85% of all decisions are not rational	100% when the negotiator is the object of the negotiation

The more a person is involved, the more the outcome of the negotiation will be determined by their feelings.

RETAIL EXCELLENCE ACADEMY

Coaching and Relationship | **How to Attenuate Perceptual Filters**

To attenuate perceptual filters, you must:

- Become aware that filters exist
- Identify the nature of the filters
- Seize the opportunity to question yourself
- **Evaluate behaviours, not the person**

  Exemple: ”the receptionist was not customer-oriented.” vs “the receptionist did not verify contact details”
- Certainly… **BE ASSERTIVE**

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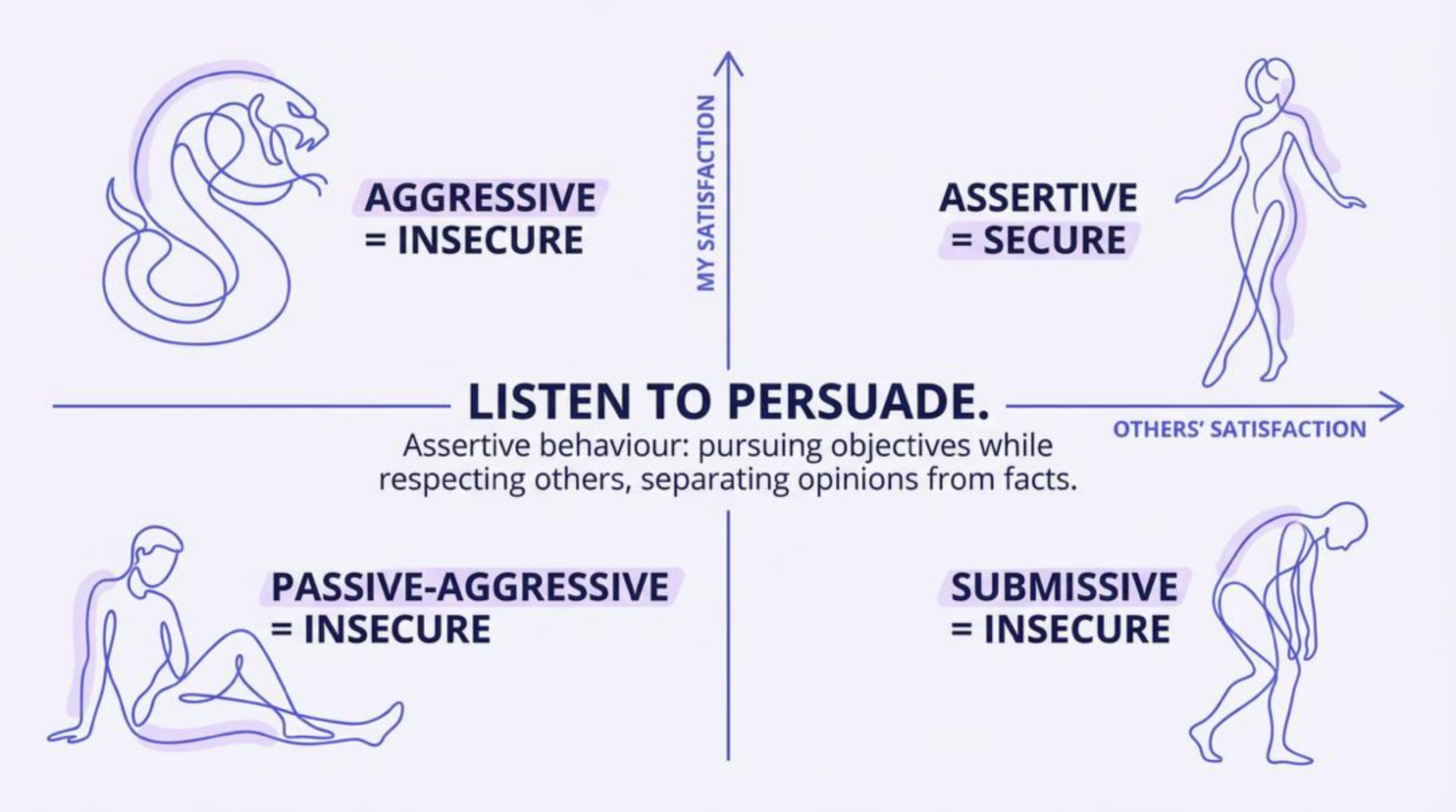
Coaching and Relationship | **The Assertiveness Model and Listening**



The assertive behaviour belongs to those who are able to separate opinions from facts, pursuing their own objectives but always seeking to respect the other's objective.

Coaching and Relationship | **The Assertiveness Model and Listening**

WARNING

Coaching and Performance Management

Site Team member Evaluation Areas

1. Performance Results

budget, KPI

Value

2. Patient Management (Communication Model)

welcome, orientation, clarity, patient interaction

3. Knowledge of the SYNLAB Product / Service

tests, campaigns, services

4. Operational Management

check-in flow, consent, data quality, reporting

PRO-Value

🔲 The PRO-Value Model: The 4 Areas

Before starting the exercise, carefully read the four employee evaluation areas. They are fundamental for understanding how performance is measured in a modern company.

1

Performance Results

The results obtained by the employee in relation to company objectives. This is the foundation of the evaluation: ***Did the employee achieve their targets?***

2

Patient Management

The ability to communicate with patients/clients using the **Communication Model**. Includes active listening, empathy, and clarity of message.

3

Knowledge of Product/Service

How well the employee knows SYNLAB products and services. Technical knowledge is essential for answering client queries.

4

Operational Management

Management of daily operations: efficiency, punctuality, and adherence to company procedures.

RETAIL EXCELLENCE ACADEMY

▯ Exercise 4: You Write!

Choose **two evaluation areas** and write a brief description (2–3 sentences) of one of your site team members for each area.

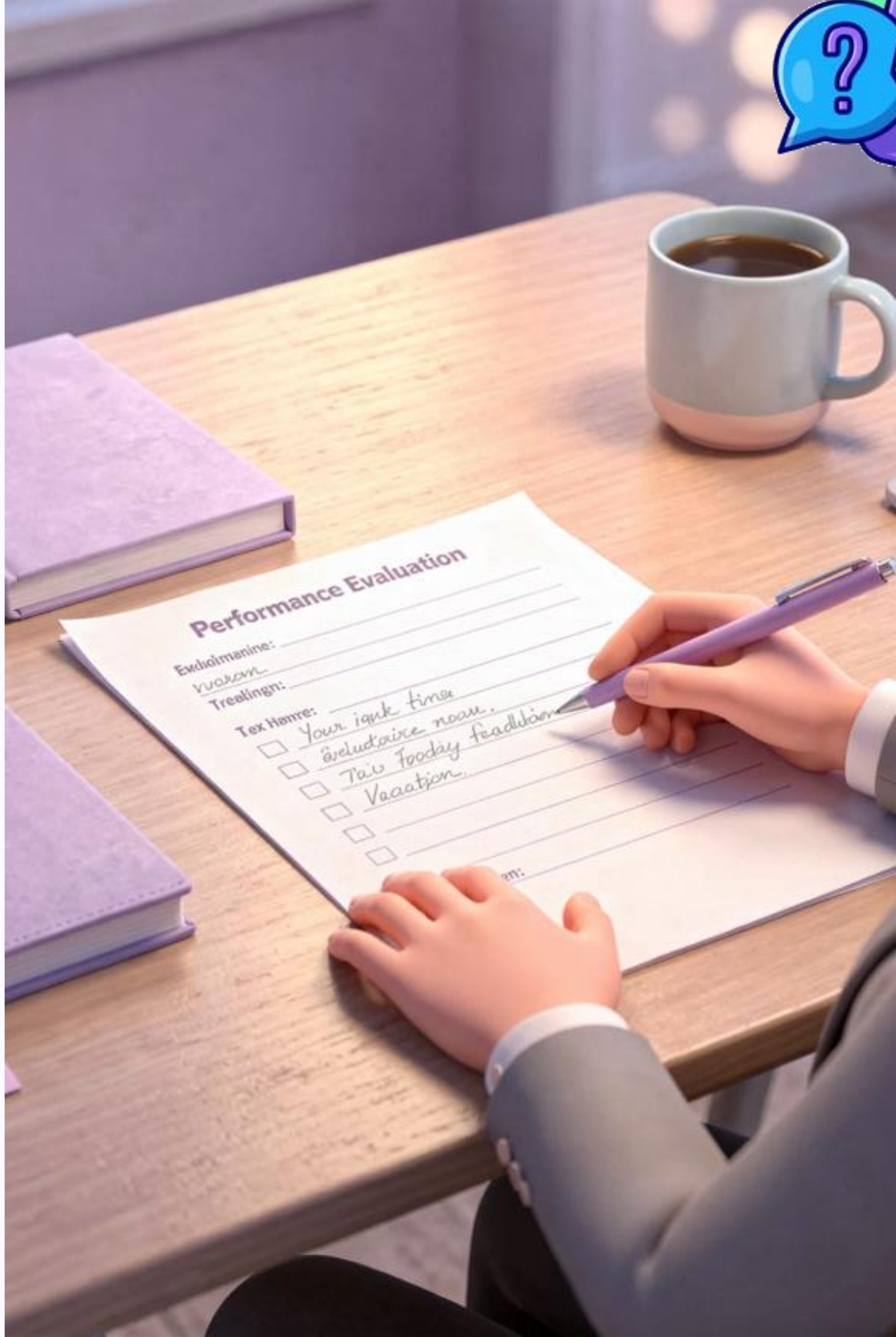
▯ Area 1: ______________________________

Write 2–3 sentences describing a site team member's performance in this area:

▯ Area 2: ______________________________

Write 2–3 sentences describing a site team member's performance in this area:

▯ 💡 **Example:** "During peak hours, Marta welcomes patients calmly and explains next steps clearly. She still needs to improve consistency in verifying email and consent before closing the interaction.."



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MANAGER COACH | PART 02

AREA MANAGER: EXPECTED BEHAVIOURS

A comprehensive profile of the competencies, responsibilities, and behaviours that define excellence in the Area Manager role - where every dimension is a piece of a larger puzzle.

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- **M**apping the Baseline
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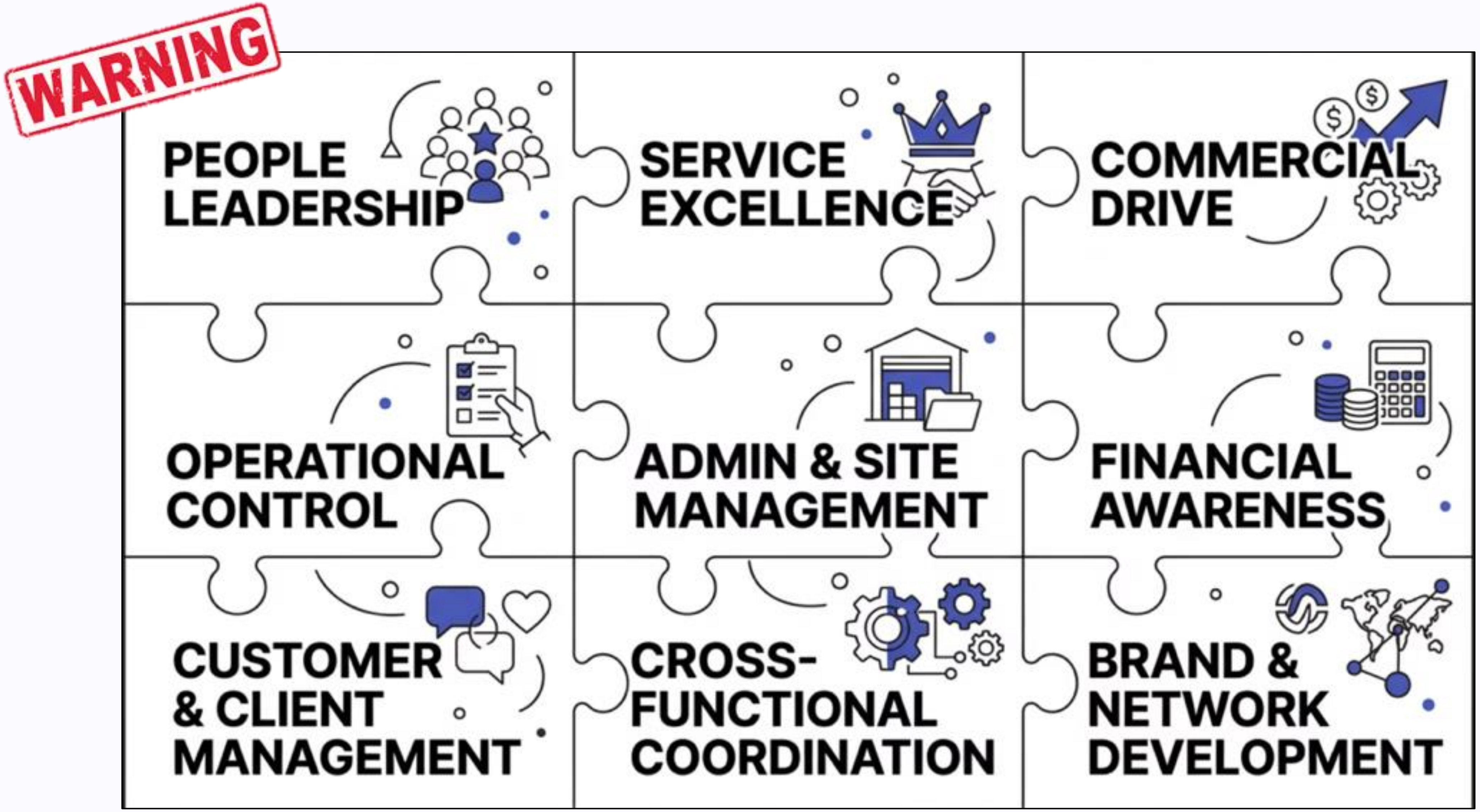
PART 04

4. Final Role-Play

PART 05

The Area Manager Puzzle

Excellence in the Area Manager role is not defined by a single strength - it is the sum of nine interconnected competencies. Each cluster represents a critical piece of a puzzle that, when assembled, creates a complete, high-performing leader capable of driving results across the entire network.



These behaviours become visible through four recurring AM routines:

- commercial follow-up,
- performance visits,
- maturity checks and
- weekly meetings

People Leadership

The Area Manager selects, coaches, evaluates, and organises teams to ensure capability, coverage, and consistent performance across all sites. This means actively identifying talent gaps, running structured coaching conversations, and building succession pipelines. A strong people leader creates the conditions for teams to thrive - not just today, but sustainably over time.

Select
Recruit and onboard the right profiles for each site's needs.

Coach
Provide regular, structured feedback and development conversations.

Evaluate
Assess performance fairly and consistently using clear criteria.

Organise
Ensure coverage and capability alignment across all locations.

💡 **Where this shows up**: People Leadership → **Commercial Follow-up, Weekly Meeting**

Service Excellence

The Area Manager drives service quality by reinforcing customer protocols, soft skills, and a patient-centred experience at every site. This goes beyond compliance - it requires embedding a culture where every team member understands that the quality of the human interaction is as important as the technical outcome.

Reinforce Protocols

Ensure all customer-facing standards are consistently applied and understood at site level.

Develop Soft Skills

Coach teams on communication, empathy, and professional conduct in every patient interaction.

Champion Patient-Centricity

Make the patient experience the lens through which all service decisions are made.

💡 **Where this shows up: Service Excellence** → Commercial Follow-up, Maturity Check

Commercial Drive

The Area Manager monitors sales performance, develops locally relevant actions, and ensures effective execution of commercial priorities — including cross-selling opportunities. Commercial drive means translating company-wide targets into tangible, site-specific plans, and holding teams accountable for delivery while keeping the customer at the centre.

Monitor & Analyse

Track sales KPIs across all sites, identify underperformance early, and understand root causes before acting.

Develop Local Actions

Create tailored commercial plans that reflect the specific context, client mix, and opportunity of each site.

Execute & Cross-Sell

Ensure teams actively promote the full portfolio of services, maximising revenue per customer visit.

💡**Where this up: Commercial Drive** → Commercial Follow-up, Performance Visit

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Operational Control

The Area Manager uses structured routines, dashboards, site visits, and action plans to keep performance on track and aligned with targets. Operational control is not about micromanagement — it is about creating the visibility and rhythm necessary to intervene early, celebrate progress, and remove barriers to execution.

01

Establish Routines

Set a regular cadence of reviews, check-ins, and site visits that creates predictability and accountability.

ĆČ

Use Dashboards

Leverage real-time data to monitor performance indicators across the network at a glance.

03

Conduct Site Visits

Be present on the ground to validate data, observe behaviours, and build team confidence.

04

Drive Action Plans

Translate insights into concrete, time-bound corrective or improvement actions at site level.

💡**Where this up: Operational Control** → Performance Visit, Weekly Meeting

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PIECE 5 OF 9

Administrative & Site Management

The Area Manager oversees key administrative processes, site maturity, equipment functionality, and infrastructure follow-up. While operational in nature, this competency underpins everything else — a site that is poorly managed administratively will struggle to deliver on any other dimension of the Area Manager's remit.

Administrative Processes

Ensure all documentation, compliance records, and reporting obligations are met accurately and on time.

Site Maturity

Assess and develop each site's operational readiness and capacity to deliver to standard.

Equipment & Infrastructure

Monitor the functionality of all equipment and escalate infrastructure issues to ensure uninterrupted service.

💡**Where this up: Administrative & Site Management** → Maturity Check, Performance Visit

RETAIL EXCELLENCE ACADEMY

PIECE 6 OF 9

Financial & Business Awareness

The Area Manager reviews business performance, controls cost versus sales, and supports budgeting and new business initiatives. Financial literacy at this level means more than reading a P&L — it means understanding the levers that drive profitability, spotting cost inefficiencies, and actively contributing to business growth conversations.

Review Performance

Analyse revenue, margin, and cost trends regularly across all managed sites.

Control Costs

Identify cost overruns vs. sales targets and implement corrective measures promptly.

Support Budgeting

Contribute to annual budget preparation with accurate site-level forecasts and insights.

New Business

Support the identification and development of new business opportunities within the network.

💡**Where this up: Financial & Business Awareness** → Performance Visit

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Customer & Client Management

The Area Manager monitors feedback, complaints, waiting times, and client needs to improve satisfaction and service delivery. Managing the voice of the customer is both a listening discipline and an action discipline — it requires closing the loop on every piece of feedback and using data to prioritise systemic improvements.

Listen Actively

Systematically collect and review customer satisfaction data, NPS scores, and complaint trends across the network.

Manage Complaints

Ensure all complaints are handled promptly, professionally, and that root causes are addressed to prevent recurrence.

Reduce Waiting Times

Monitor flow and capacity at site level, implementing scheduling or process changes to improve the customer journey.

Anticipate Client Needs

Develop a deep understanding of client profiles and expectations to proactively adapt service delivery.

💡**Where this up: Customer & Client Management** → Performance Visit, Weekly Meeting

Cross-Functional Coordination

The Area Manager works closely with internal functions — HR, Finance, Operations, Marketing, and others — to ensure alignment, clear communication, and consistent execution across the network. Being effective in this dimension requires the ability to influence without authority and to act as a bridge between the field and the centre.

→ Align with Central Functions

Ensure that company-wide initiatives and policies are properly understood and implemented at site level.

→ Communicate Upwards & Sideways

Share field insights, blockers, and successes with relevant stakeholders to inform decision-making.

→ Drive Consistent Execution

Ensure that cross-functional plans translate into coherent, coordinated actions across all managed sites.

💡**Where this up: Brand & Network Development** → Maturity Check, Performance Visit

Brand & Network Development

The Area Manager ensures that the brand is consistently represented, that network standards are upheld, and that each site contributes positively to the company's reputation and growth ambitions. This means acting as a guardian of brand integrity while also identifying opportunities to strengthen the network's presence and impact in the local market.

Protect Brand Standards

Ensure every site reflects the brand identity in terms of environment, communication, and service delivery.

Develop the Network

Identify opportunities to strengthen existing sites and support the opening or improvement of new locations.

Build Local reputation

Foster relationships and visibility in the local community to grow trust and awareness of the brand.

💡**Where this up: Cross-Functional Coordination** → Weekly Meeting, Maturity Check follow-up

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The Complete Area Manager Profile

When all nine pieces come together, they form the portrait of an Area Manager who leads with purpose, drives results, and builds the foundation for sustainable growth across the network.

1

People Leadership

Build capable, motivated teams across all sites.

2

Service Excellence

Deliver a consistently outstanding patient experience.

3

Commercial Drive

Execute commercial priorities and grow revenue.

4

Operational Control

Keep performance on track through structured routines.

5

Admin & Site Mgmt

Maintain operational readiness at every site.

6

Financial Awareness

Understand and actively manage business performance.

7

Customer Management

Act on feedback to continuously improve satisfaction.

8

Cross-Functional

Coordinate effectively with all internal partners.

9

Brand Development

Uphold standards and grow the network's reputation.

💡**The AM role** is not measured only by what they know, but **by how consistently they turn visits into better habits, better execution and better business results**

▯ Exercise 5: Putting the Profile into Practice

Reflect on your own role and experiences:

▯ Which of these nine behaviors do you believe is currently your strongest asset, and why?

▯ Which behaviour presents the biggest opportunity for development, and what tangible action could be taken to improve it?

💡 **Example:** " **Strongest Asset:** Operational Control. I have built robust weekly routines that ensure every site manager tracks their KPIs consistently, wbhich has led to a 10% improvement in operational stability.."

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MANAGER COACH | PART 03

RETAIL COACHING MODEL

Agenda

1. The Fundamentals — PART 01

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- **M**apping the Baseline
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PART 04

- **O**n-the-Job Execution
- **R**eview and Relaunch

4. Final Role-Play — PART 05

MENTOR

Retail Coaching Model

Review and Relaunch **06 | R**

On-the-Job Execution **05 | O**

Transparent Objectives **04 | T**

01 | M Mapping the Baseline

02 | E Exploring Root Causes

03 | N Navigating the Journey

💡MENTOR is the method; field visits are the moments in which the method comes to life.

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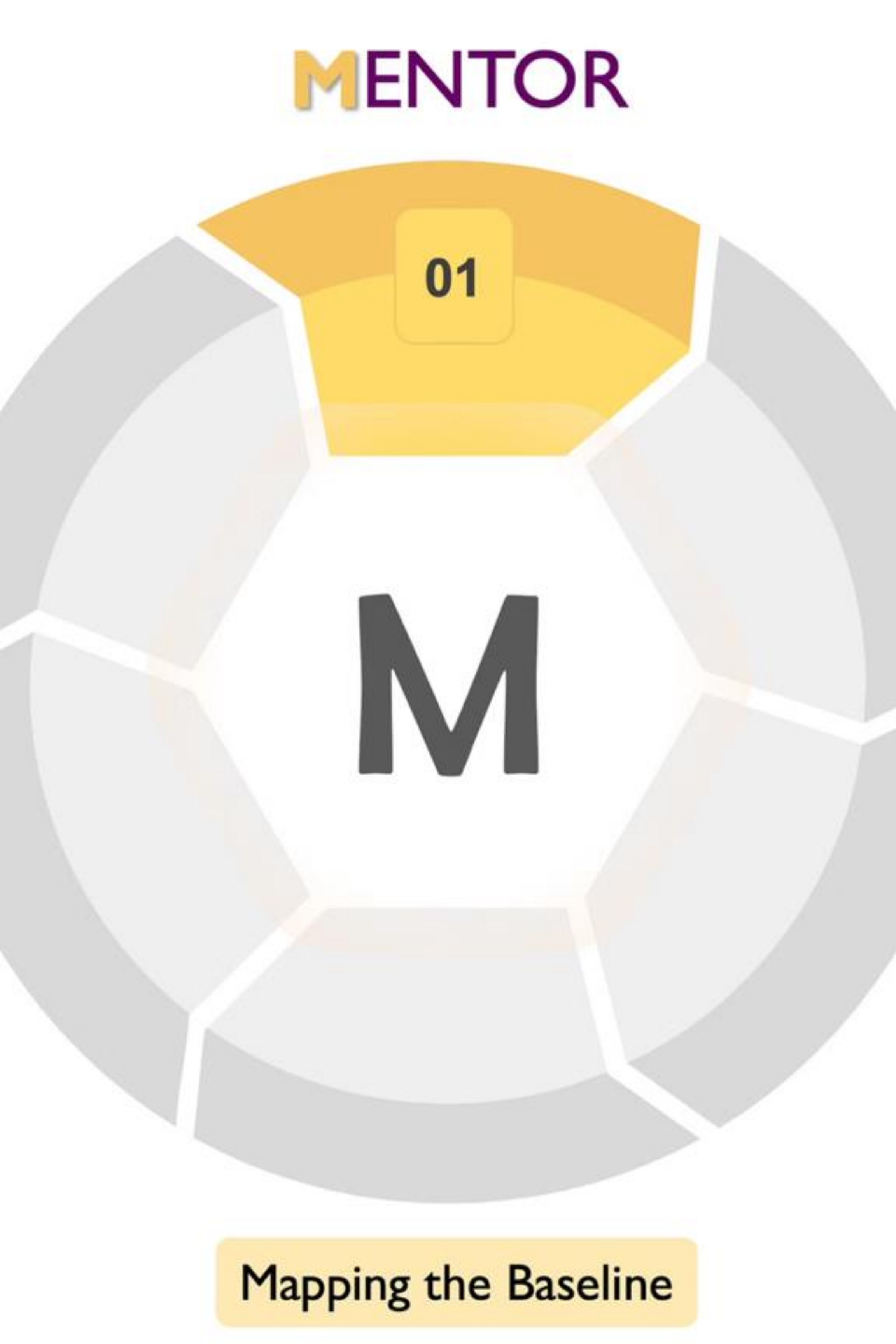
Mapping the Baseline: Assessment



BEHAVIOURS

COACHING THEMES

- Techincal Knowledges
- Skills
- Experience
- Predispositions

MENTOR | Mapping the Baseline

The MENTOR model provides a structured framework for retail coaching, guiding managers through each phase of the coaching journey - from initial assessment to final review and relaunch.

- ✅ observation during Commercial Follow-up
- ✅ KPI review during Performance Visit
- ✅ standards review in Maturity Check
- ✅ action follow-up in Weekly Meeting

MENTOR | Measuring Behavioural Parameters

Coaching is based on the **Observation of Behaviours**, which must be:

Shared

Agreed upon between coach and coachee

Specific

Clearly defined and unambiguous

Measurable

Quantifiable and observable

Implementable

Actionable and achievable in practice

MENTOR | Measuring Behavioural Parameters

First Parameter

- Is the behaviour present or absent?
- How many times does the behaviour occur?

Second Parameter

- In terms of effectiveness, did the behaviour achieve the objective for which it was adopted?

- ❑ greeted by name: yes/no
- ❑ explained next steps: yes/no
- ❑ verified contacts: yes/no
- ❑ asked for consent clearly: yes/no
- ❑ linked offer to patient need: yes/no

MENTOR | Behavioural Parameters Overview

1

Observation

Direct and indirect detection of facts and behaviours

2

Frequency

How often does the behaviour occur?

3

Presence

Is the behaviour present or absent?

4

Effectiveness

Did the behaviour achieve its intended objective?

5

Measurement

At least one shared tool and scale between observer and observed

SYNLAB WelcomeFlow

01 Preparation

Check flows and priorities, set up the desk and materials, define the objectives

02 Opening

Welcome and orient the patient, identify reason and urgency, explain the steps, adapt tone and pace

03 Welcome and Orientation Strategy

Ask targeted questions, confirm tests and costs, tailor to the profile, get micro-confirmations

04 Value Actions

Deliver a frictionless check-in, verify contact details, manage consent and objections, activate relevant value options

05 Analysis & Follow-Up

Close with clear report instructions, record data and notes, improve the standard

💡This is the behavioural grid to use during peak-hour observation.

SYNLAB WelcomeFlow

MENTOR | Welcome Flow Model and Behaviours

RETAIL EXCELLENCE ACADEMY

Step	Behaviourals
01 Preparation	• Verify flows, priorities and queue system (digital/manual). • Prepare workstation and materials (labels, credentials, consents, leaflets). • Anticipate unforeseen events and define a Plan B. • Set operational objectives (timing, data, consents, digital).
02 Opening	• Welcome calmly and professionally, call by name when possible and immediately orient the patient. • Frame the reason for interaction and urgency in a few seconds. • Explain the next steps and what is needed (documents, ticket/fee, estimated times) simply. • Verify patient availability (rush, anxiety, doubts) and adapt tone and pace.
03 Welcome & Orientation Strategy	• Elicit needs with brief questions. • Confirm exams/services and costs transparently before proceeding. • Personalise the approach to the profile (HCS episodic, recurring, D2C, out of pocket, insured). • Obtain micro-confirmations throughout the conversation (correct data, chosen notification channel, understanding of the process).
04 Value Actions	• Carry out standard acceptance (identification, prescription scan, ticket/fee, printing, labels, credentials). • Collect and verify email and mobile number, motivating them as a service (report notification, credential recovery, assistance). • Manage consent and objections, with explicit choice. • Activate "Value4U" consistently with the patient profile
05 Analysis & Follow-Up	• Verify that the patient leaves with clear instructions (where to go, timing, report access, password recovery). • Accurately record key information (verified contacts, consents, profile, useful notes). • Immediately analyse the interaction and identify what worked and what to improve.

MENTOR | Measuring Behavioural Parameters – Observation

DIRECT

First-hand detection of "facts" and "behaviours"

INDIRECT

Detection of "data" and "accounts" from other sources

THEY COMPLEMENT AND REINFORCE EACH OTHER

MENTOR | Measuring Behavioural Parameters | "Evidence-Based" Observation

OPINIONS

Subjective interpretations that are not grounded in observable facts

BEHAVIOUR

- Behaviours must be observed by both the observer and the observed
- They can be evaluated based on at least one shared scale between observer and observed

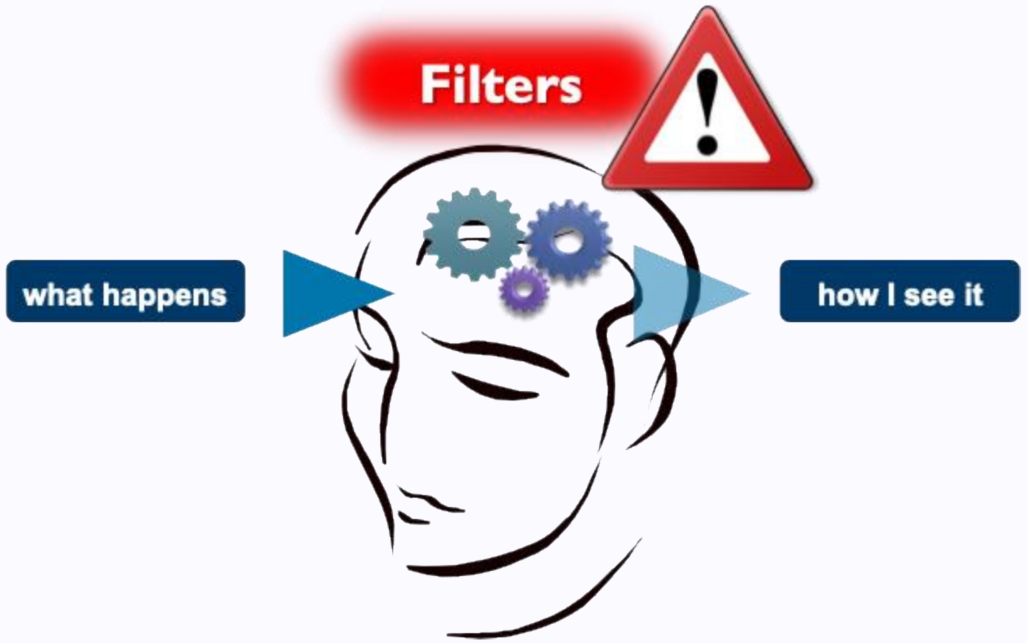
MENTOR | Measuring Behavioural Parameters - "Evidence-Based" Observation

What happens

The objective reality of the situation as it unfolds

How I see it

The subjective perception filtered through personal experience and bias



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MENTOR | Measuring Behaviours

Bias and Experience

Our personal experience and unconscious biases inevitably influence how we observe and evaluate the behaviours of others. Recognising these filters is the first step towards more accurate and fair assessment.

MENTOR | Measuring Behaviours – **Biases: Where Do They Come From?**

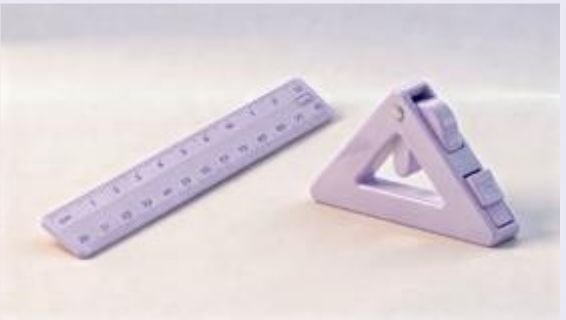

Inference


Haste


Inaccurate observation


Self-projection


Inappropriate comparisons


Double standards


Tendency to judge

MENTOR | Measuring Behaviours – **Bias and Behaviour**

Halo Effect

A psychological phenomenon whereby the assessment is influenced by pleasure or, conversely, by low regard towards a person.

Pygmalion Effect

A phenomenon whereby a Coach conditions their Coachee based on a personal expectation towards them, whether positive or negative.

"Self-Fulfilling Prophecy"

A phenomenon whereby if a Coach holds deep esteem or, conversely, low regard for their Coachee, they will treat them accordingly.

💡Maturity Check and Performance Visits also require objectivity: score what you see, not what you expect!

Filters... | **The Awareness Test**

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Exploring Root Causes

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Exploring Root Causes: Diagnosis

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RETAIL EXCELLENCE ACADEMY

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MENTOR | Unifying All Priorities – **From Observation to Analysis**

1 | Measurement

Direct and indirect detection of "facts", "behaviours" and "data"

- Identify the "nodes" to observe
- Identify "missing data", unclear aspects, contradictions
- Transform "nodes" into hypotheses to be validated through the collection of further data

2 | Diagnosis

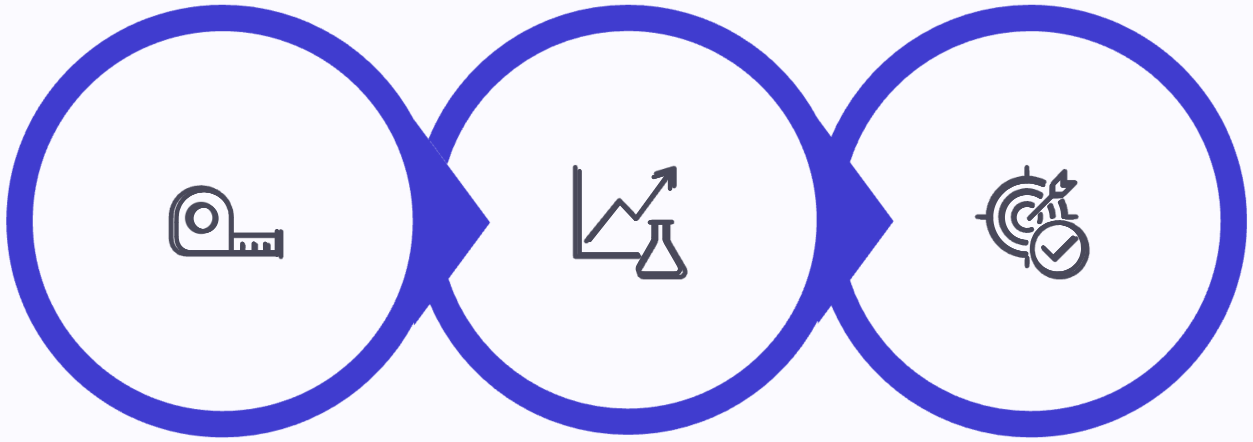
Overview: identify areas of strength and development

Symptom → possible behaviour root cause → visit type to validate it

Example:

- **low cross-sell** → weak questioning / no campaign activation → Commercial Follow-up
- **poor budget trend** → weak local actions / no follow-up → Performance Visit
- **poor brand execution** → missing materials / setup issues → Maturity Check

MENTOR | Unifying All Priorities – **From Analysis to Diagnosis**



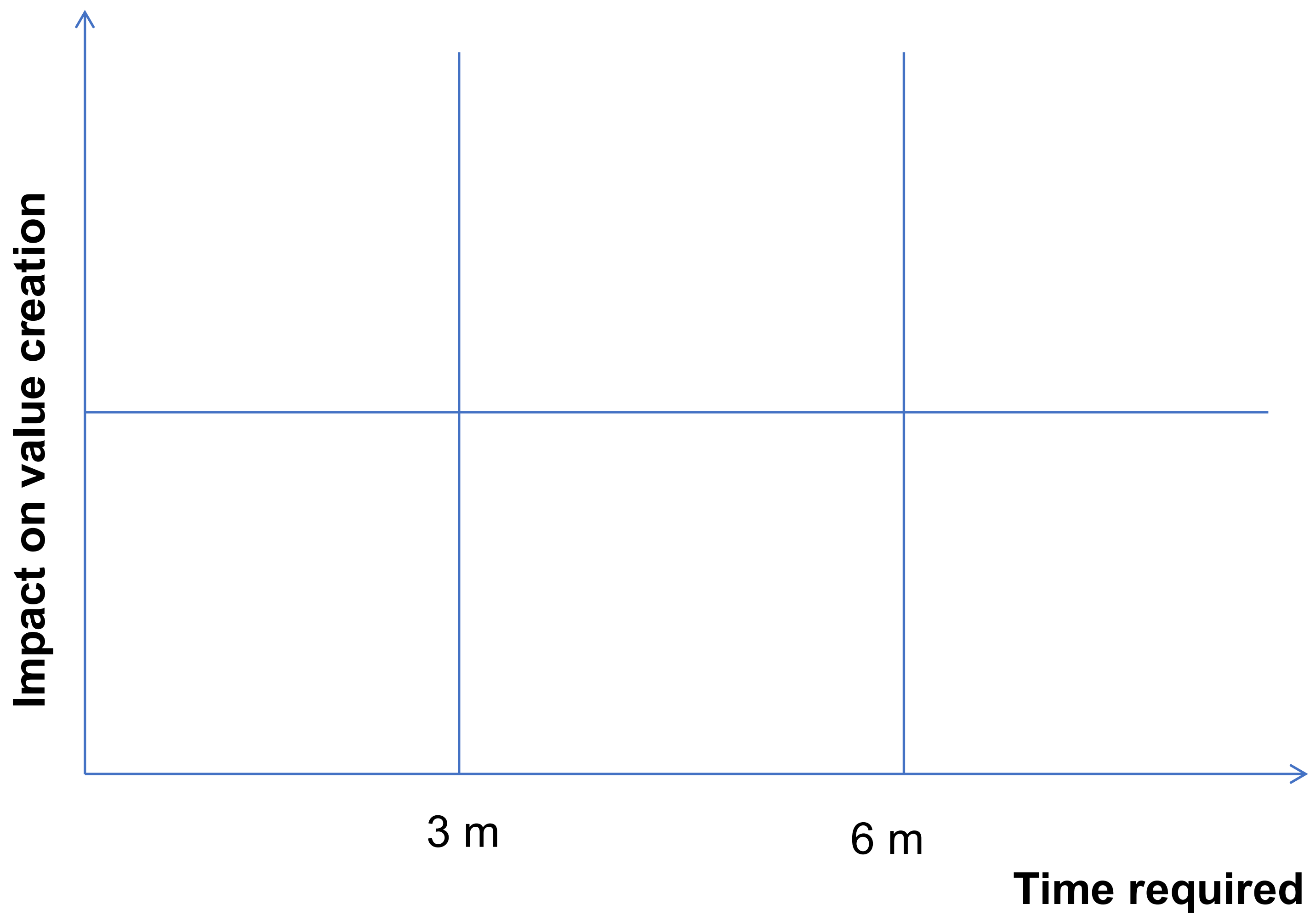
Measurement

Diagnosis

Prioritise

Exercise 6: Identify Your priority areas, Impact on Value and Time required

01 Preparation
02 Opening
03 Reception and Guidance Strategy
04 Value Actions
05 Analysis & Follow-Up



MENTOR | Unifying All Priorities – **How to Define Priorities**

Step	Impact on Value Creation	Time Required
01 Preparation	High	3 months
02 Opening	High	3 months
03 Welcome & Orientation Strategy	Medium–High	6 months
04 Value Actions	High	6 months
05 Analysis & Follow-Up	Medium	3 months

Impact on Value Creation

Evaluate which behaviours have the greatest impact on building value for the patient and the organisation.

Time Required

Consider whether the improvement can be achieved within **3 months** or requires **6 months**.

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Navigating the Journey: Coaching Plan

MENTOR | Translating diagnosis into the visit plan

1. Who needs more Commercial follow-up
2. Which sites need deeper Performance visits
3. Where to schedule Maturity Check
4. What to reinforce in Weekly Meeting

MENTOR | Setting Up the Plan

Once the diagnosis is established > area and behaviours to improve for each Team Member:

Allocate Resources

Assign time and investment per team member based on priorities

Analyse Plan Effectiveness

Review and validate the plan before implementation

Fine-Tune the Plan

Adjust after sharing interviews and feedback

MENTOR | Setting Up the Plan

Allocate Resources

- How many days do I have for coaching? (per month and per semester)
- What other support do I have available; cost/benefit assessment (ex. personalised training courses…)
- Allocate time/investment for each Team Member, based on the priorities for each individual within the team

WARNING

Time

Careful **time allocation** is the foundation of an effective coaching plan.

MENTOR | Setting Up the Plan

Analyse Plan Effectiveness

1 Check for diagnosis errors

- Same area of improvement
- ....

2 Verify resource allocation

- Same number of coaching days
- Number of days not aligned with priorities
- Same action for everyone
- ....

3 Final verification of sustainability/effectiveness of the plan

MENTOR | Setting Up the Plan

Possible Errors

Analyse Plan Effectiveness

All performances are positive

A warning sign that the assessment may not be sufficiently differentiated.

All performances are negative

A warning sign that the assessment may be overly critical or biased.

Few variations within the team

A warning sign that individual differences are not being captured accurately.

MENTOR | Setting Up the Plan

Possible Errors

Analyse Plan Effectiveness

- Am I using different standards?
- Am I impatient, or too patient?
- Am I making unreasonable comparisons?
- Are my expectations too high or too low?
- Am I using myself as a benchmark?

MENTOR | Setting Up the Plan

Fine-Tune the Plan

- We hold a sharing meeting
- Any modification after having shared the interviews

The fine-tuning phase ensures the plan is co-owned and adapted based on real feedback from the sharing interview.

Exercise 7: Putting It All Together

This practical exercise is designed to help you consolidate everything we have covered in the "N" step: the coaching plan module. By applying it, you will transition from theory to a tangible, actionable plan for your team.

01 (from Exercise 6: "E" step)

Diagnose your team

Identify specific growth areas and target behaviors to improve for each team member.

02

Allocate Resources

Define dedicated coaching days and select appropriate support tools for each individual.

03

Analyse Plan Effectiveness

Check for potential gaps, verify resource allocation, and validate the long-term sustainability of your approach.

04

Fine-Tune the Plan

Hold a sharing meeting to gain alignment and adjust your objectives based on direct feedback.

05

Present your Plan

Share and discuss your final coaching plan with a peer or your manager to refine your strategy.

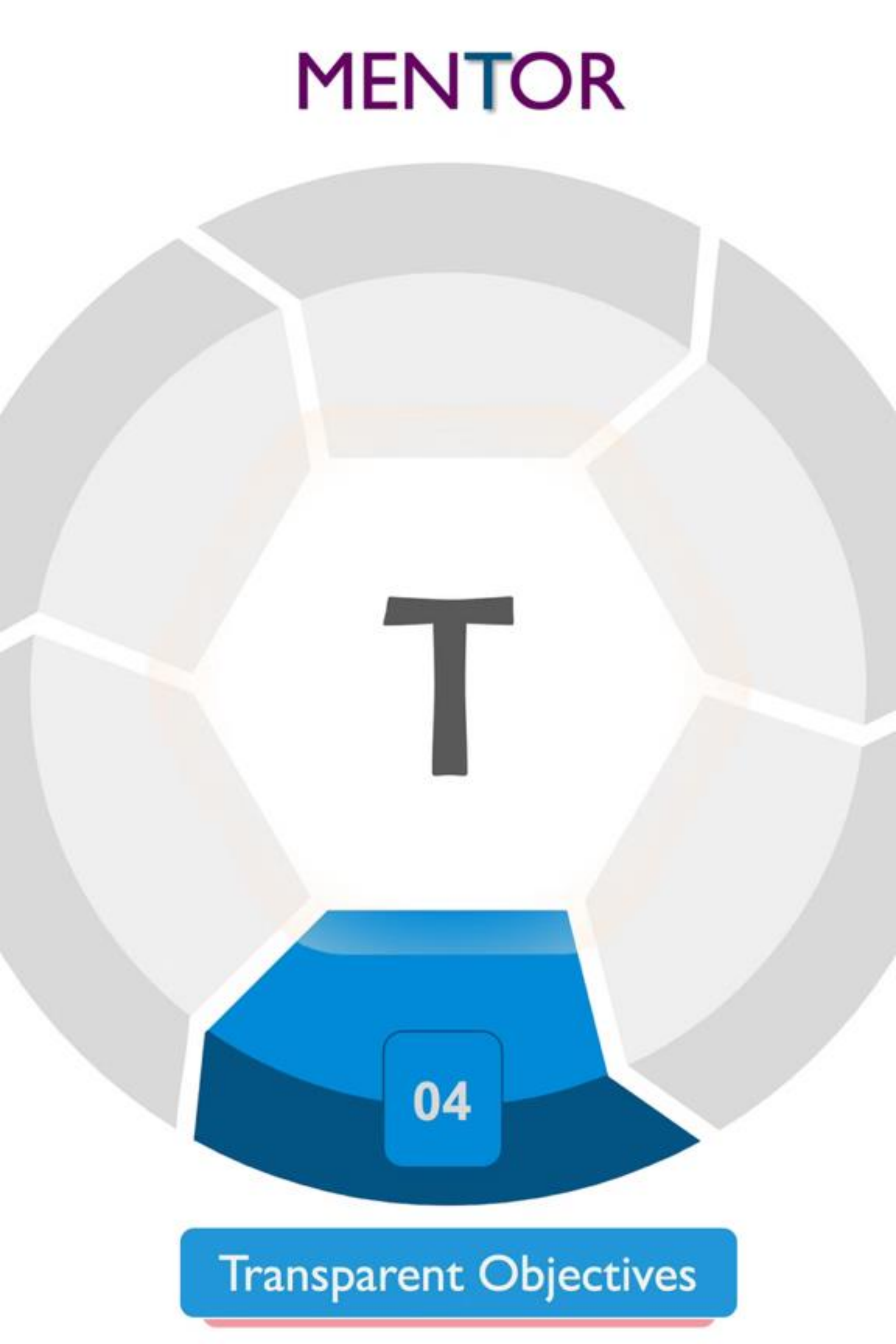
MENTOR

MENTOR

Transparent Objectives:
Sharing Objectives and the Plan

Winch

SYNLAB



MENTOR | Interview to Plan – **Meeting Contents**

M | Mapping the Baseline

Share the observation

E | Exploring Root Causes

Share the areas of improvement. Share the priority area of improvement and the associated behaviours.

N | Navigating the Journey

Shared planning (considering any external interventions). Define possible actions to put into practice before coaching. Agreement and timing.

MENTOR | Interview to Plan – **Adhesion – Opposition**

Endogenous Objectives

We tend to develop a strong **adhesion** to the objectives that we set ourselves.

Objectives we set ourselves → ADHESION

Exogenous Objectives

We tend to develop a certain degree of **resistance** towards objectives that are imposed on us by others.

MENTOR | Interview to Plan – **Adhesion – Opposition**

Own Objectives
Highest personal motivation

Negotiation
Discuss and align expectations

Accepted Objectives
Shared, medium motivation

MOTIVATION
Outcome: engagement and action

Remember: 1 maximum **2 areas of improvement**

MENTOR | Interview to Plan – **Steps of a Shared Interview**

Pre-Meeting

- Observation card "M"
- Priorities "E" (1/2 max)
- Plan "N"
- Anticipate possible objections
- Logistics (location + timing and agenda)

Meeting

- Create the climate
- Define the agenda (objective)
- Share “M”-”E”-”N”
- Request and confirm the plan

💡The goal is not only agreement on development areas, but commitment before the next visit.

TRANSPARENT OBJECTIVES: SHARING OBJECTIVES AND THE PLAN

MENTOR | Interview to Plan – **Sharing "M"-"E"-"N" – Steps**

Step 1
Ask the team member to carry out a self-analysis.

Step 2
Share the observation card M with one area of improvement and one area of strength. Ask the team member what they think and for their feedback.

Step 3
Share and "activate" the intervention priorities in the days immediately following.

Step 4
Share the plan; ask the team member for possible additional actions.

MENTOR | Interview to Plan – **Steps of a Shared Interview**

1. **Pre-Meeting**
   Prepare observation card and priorities
2. **Create the Climate**
   Build rapport and psychological safety
3. **Define the Agenda**
   Set the objective for the meeting
4. **Share “M”-”E”-”N”**
   Share Mapping, Exploring and Navigating
5. **Request and Confirm the Plan**
   Obtain agreement and commitment

MENTOR| Interview to Plan – **Obtaining Agreement on Key Steps**

Confirm the Observation

Ensure the team member acknowledges and accepts the observed behaviours.

Agree on Priorities

Jointly confirm the 1–2 priority areas of improvement.

Commit to the Plan

Obtain explicit commitment to the coaching plan and the agreed actions.

SYNLAB

30.01.2026

MANAGER COACH | PART 04

RETAIL COACHING MODEL

RETAIL EXCELLENCE ACADEMY

Agenda

MENTOR

Retail Coaching Model

01 | M Mapping the Baseline

02 | E Exploring Root Causes

03 | N Navigating the Journey

04 | T Transparent Objectives

05 | O On-the-Job Execution

06 | R Review and Relaunch

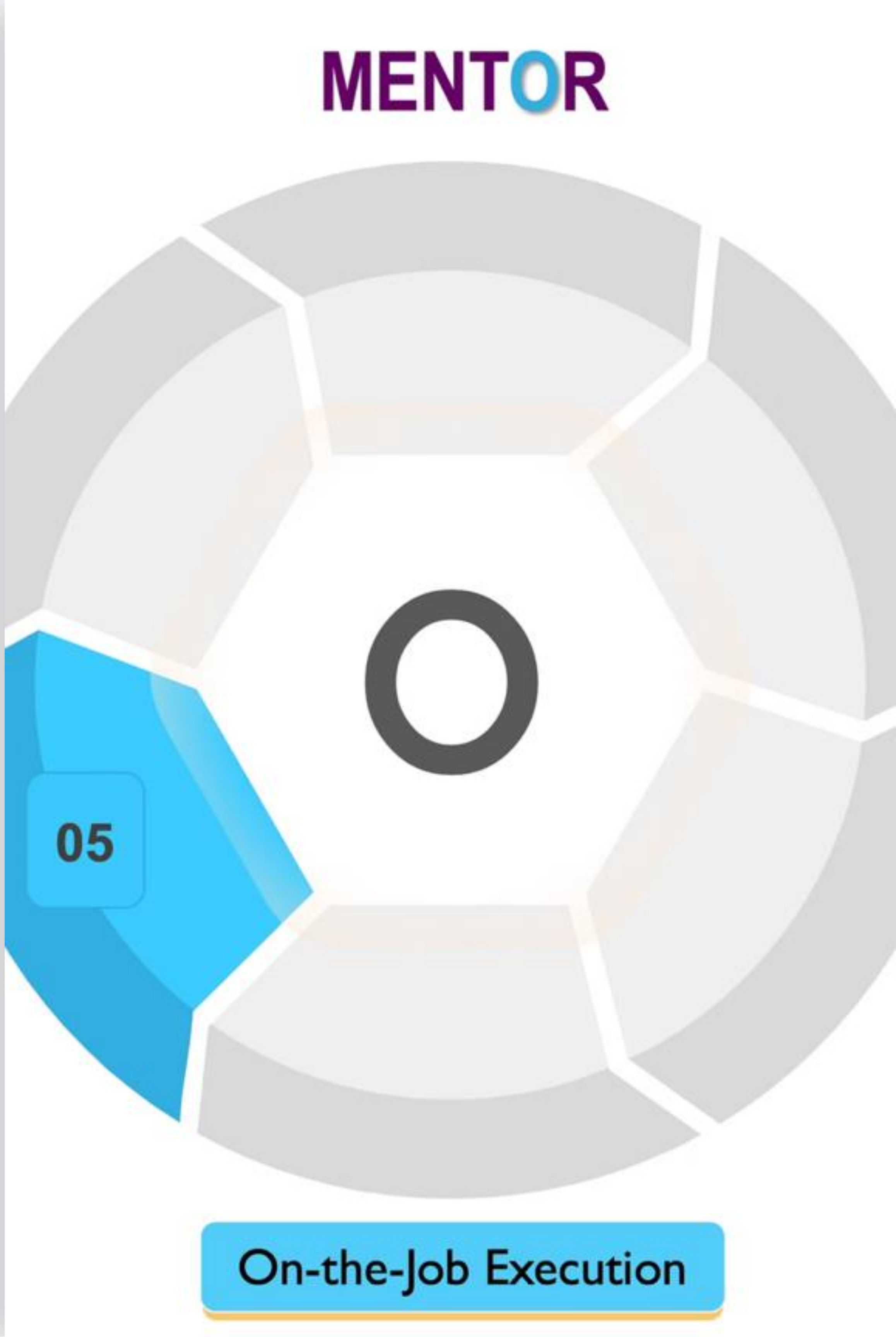
💡MENTOR is the method; field visits are the moments in which the method comes to life.

MENTOR

On-the-Job Execution:

Accompaniment and Support

STEP O – OPERATIONAL FIELD WORK



MENTOR | Field Coaching (Commercial Follow-up Visit)

1. Preparation for the day
2. Opening the meeting: recall shared objectives
3. After two/three interactions: first feedback – summary of what was observed
4. Specific actions during the day, if necessary
5. After each interaction, deliver feedback
6. Closing meeting and sharing of future actions

MENTOR | Field Coaching (Commercial Follow-up Visit)

1. Preparation for the day | How the Manager prepares for coaching

- Review the site team member's "MEN" card (= review last coaching points; review the visit plan and identify who to observe)
- Review the actions/objectives from last time (if this is not the first coaching session)
- Define objectives for the individual day ("What do I want to achieve tomorrow?")
- Think about potential activities for the day
- Consider possible actions to take following this day
- Anticipate potential objections/criticisms from the site team member

MENTOR | Field Coaching (Commercial Follow-up Visit)

2. Opening the meeting: recall shared objectives

Contextualise the main objectives

- ***"I'm here to support your growth and help turn the protocol into a habit."***
- ***"...today we will focus on..."***

Share the day's agenda

- "...We will do 2/3 interaction with clients, then we will stop and take stock of the situation..."
- "At the end of the day we will stop to analyse what has been achieved..."

MENTOR | Field Coaching (Commercial Follow-up Visit)

3. After two/three interactions: first feedback – summary of what was observed

Self-analysis

Request a specific self-analysis on observed behaviours

Share observations

Share the observed behaviours based on the coaching objectives

Present & align

Present the analysis and share the next activities

RETAIL EXCELLENCE ACADEMY

MENTOR | Field Coaching

(Commercial Follow-up Visit)

4. Specific actions during the day, if necessary

(e.g. we stop for a role-play; I manage the next interaction...)

"

Consistently with the shared analysis of the first interactions, we expect to:

"..."

"

MENTOR | Field Coaching (Commercial Follow-up Visit)

4. Specific actions during the day, if necessary

Consistently with the shared analysis of the first meetings, we expect to:

- Stop for a role-play session between AM and site team member (full or partial depending on the day's objectives. The AM also plays the role of site team member)
- Show the site team member an example of what was suggested during the feedback meeting using a patient interaction managed by the AM (especially with junior site team members)
- "Technical" test (if the site team member has shown strong deficiencies in content)
- Recall a theoretical session from the Welcome Flow (selected as needed) to explain the rationale
- Prepare layered questions based on the information you want/desire, and the related role-play
- Analyse performance data and the resulting efficiency (or have them analysed)

MENTOR | Field Coaching (Commercial Follow-up Visit)

5. After each interaction, deliver feedback

Self-analysis

Request a specific self-analysis on observed behaviours

Share observations

Share the observed behaviours based on the objectives of the first feedback

Present & share

Present the analysis and share it

MENTOR | Field Coaching (Commercial Follow-up Visit)

6. End-of-day meeting

Allow sufficient time

Allow the necessary time for the meeting

Summary and final sharing

Review the notes taken during the day: first ask the site team member for their general impressions, then give yours

Request commitment to action

Request the commitment to the **action** that the site team member must implement after the coaching and until the next session (see next slide)

Reassure ongoing support

Reassure the site team member that the AM will continue to monitor and support them

MENTOR | Field Coaching
(Commercial Follow-up Visit)

6. End-of-day meeting

Share the actions that the site team member must carry out between coaching sessions

Specific
Clearly indicate what needs to be done

Realistic
The commitment required must be compatible with daily work

Self-assessment
Also indicate the how: how the site team member should self-assess, how to carry out the shared action

MENTOR | Field Coaching (Commercial Follow-up Visit)

6. End-of-day meeting

Share the actions that the site team member must carry out between coaching sessions | Example

> ***"The site team member does not have enough information about SYNLAB's services and tests and does not ask productive questions"***

For 2 Patients per day, write:

1	2
Preparation Information to obtain, questions to ask	During the interaction Ask the question

3	4
Analysis & Follow-Up Was the question asked? "Yes" / "No", if "No" why. What information was obtained.	Next coaching session Discussion on the three most significant cases

Exercise 8: Step 01 – **Preparation** | Tasks Between Sessions: Suggestions 1/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Verify flows, priorities and queue system (digital/manual)

Task suggestion:

Behaviour: Prepare the workstation and "key experience" materials (digital and consents)

Task suggestion:

Exercise 8: Step 01 – **Preparation** | Tasks Between Sessions: Suggestions 2/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Review notes from the last patient interaction (if available) and identify recurring critical issues

Task suggestion:

Behaviour: Define a measurable operational objective for the shift (data quality and digital)

Task suggestion:

Exercise 8: Step 02 – **Opening** | Tasks Between Sessions: Suggestions 1/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Welcome calmly and professionally, call by name when possible and immediately orient the patient

Task suggestion:

Behaviour: Frame the reason for the interaction and urgency in a few seconds

Task suggestion:

📋 Exercise 8: Step 02 – **Opening** | Tasks Between Sessions: Suggestions 2/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Explain steps and requirements simply (documents, ticket/quota, timings)

Task suggestion:

Behaviour: Check availability (hurry, anxiety, doubts) and adapt tone and speed

Task suggestion:

🎯 Exercise 8: Step 03 – **Welcome Strategy** | Tasks Between Sessions: Suggestions 1/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Bring out needs with brief questions

Task suggestion:

Behaviour: Confirm exams/services and costs transparently before proceeding

Task suggestion:

📝 Exercise 8: Step 03 – **Welcome Strategy** | Tasks Between Sessions: Suggestions 2/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Personalise the approach based on profile (episodic NHS, recurring, D2C, out of pocket, insured)

Task suggestion:

Behaviour: Obtain micro-confirmations throughout the conversation (data, channel, understanding)

Task suggestion:

📝 Exercise 8: Step 04 – **Value Actions** | Tasks Between Sessions: Suggestions 1/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Carry out standard acceptance (identification, prescription, ticket/quota, printing, labels, credentials)

Task suggestion:

Behaviour: Collect and verify email and mobile number, motivating them as a service

Task suggestion:

Exercise 8: Step 04 – **Value Actions** | Tasks Between Sessions: Suggestions 2/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Manage explicit consent

Task suggestion:

Behaviour: Activate ValorexTe in a personalised way

Task suggestion:

Exercise 8: Step 05 – **Analysis & Follow-Up** | Tasks Between Sessions: Suggestions 1/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Ensure the patient leaves with clear instructions (where to go, timings, report, password recovery)

Task suggestion:

Behaviour: Accurately record key information (verified contacts, consents, profile, useful notes)

Task suggestion:

Exercise 8: Step 05 – **Analysis & Follow-Up** | Tasks Between Sessions: Suggestions 2/2

Designe tasks to reinforce and consolidate behaviours between visits, helping turn feedback into consistent daily practice.

Behaviour: Immediately analyse the interaction and identify what worked and what to improve

Task suggestion:

MENTOR | Field Coaching (Commercial Follow-up Visit) | Subsequent Days

Between field visits, weekly meetings keep accountability alive and maintain momentum on shared actions

01

Preparation

What actions did we share?

02

Opening interview

- Recall the starting point (area to improve)
- Feedback from last time
- Actions the site team member was supposed to carry out

03

Feedback during the day

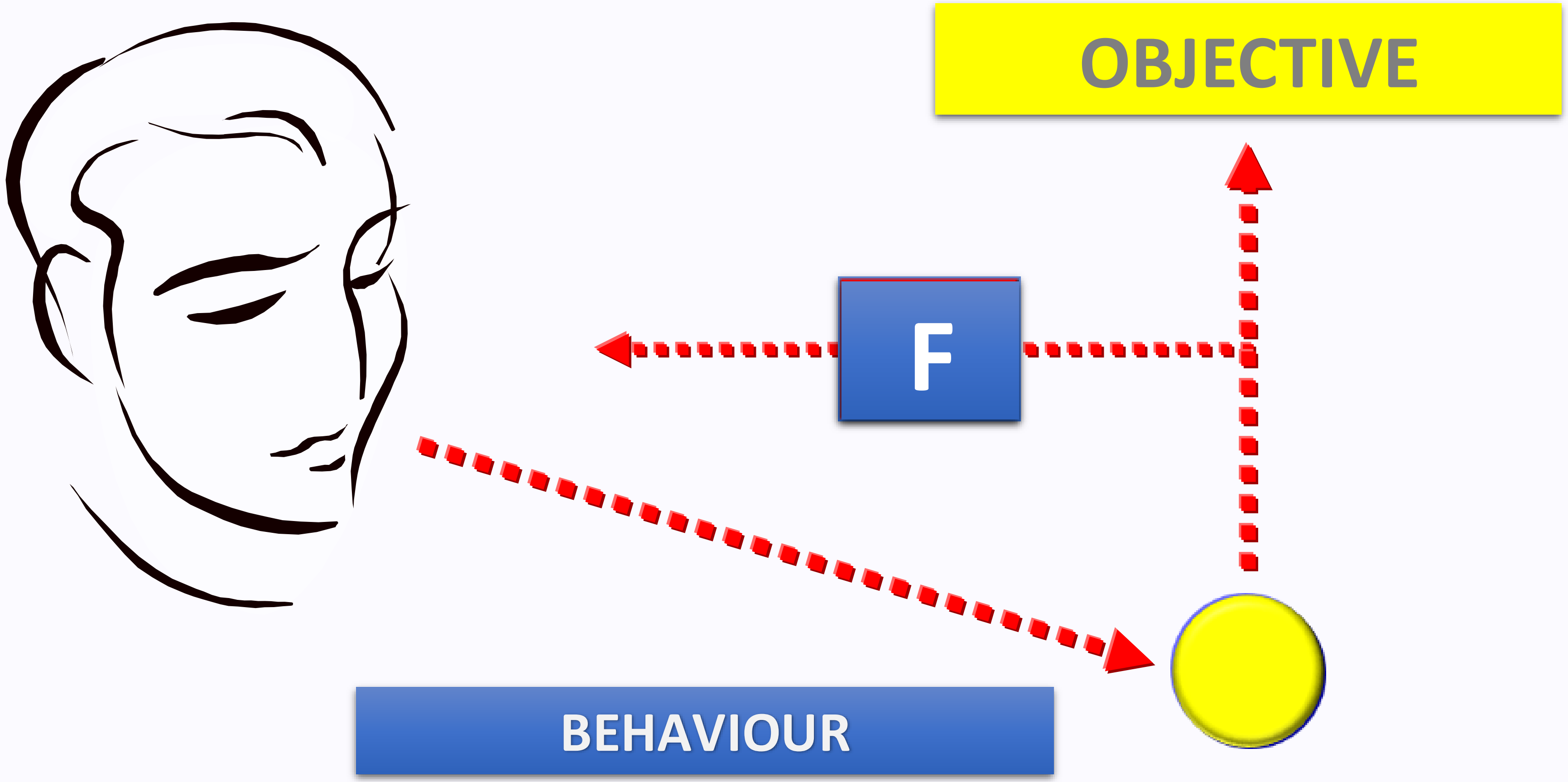
04

End-of-day meeting

Define the actions from now until the next coaching session

OPERATIONAL FIELD WORK: ACCOMPANIMENT AND SUPPORT

MENTOR| Field Coaching | Feedback, Behaviour, Objectives



Feedback: A Lever to Increase Performance

Improve performance

Suggest what to do differently, allowing team colleagues to **change** and improve

Ongoing feedback

Continuous, real-time feedback integrated into daily work

Recognise and reward good work

Reinforces positive behaviours

Build trust

Create a culture of openness and build trust

Negative feedback: leads to behavioural correction

Positive feedback: leads to persistence and reinforcement of behaviours.

Feedback: Some Rules for Feedback

Evaluate behaviours, not the person

Evaluate behaviours (SYNLAB Welcome Flow), not the person

Observed facts, not opinions

Base feedback on observed facts, not personal opinions

Detailed and positively oriented

Observation must be detailed, not generic, and of "positive orientation"

Never lose sight of the objective

Never lose sight of the objective: Performance

Feedback: HOW

Recognise **Reflect** **Explore** **Guide** **Commit**

💡**This five-step feedback process guides the Manager through a structured, empathetic, and action-oriented coaching conversation.**

MENTOR | Field Coaching | Feedback: How

1. RECOGNISE a specific the site team member's strength

- Start by acknowledging something the receptionist did genuinely well - and be specific. Generic praise does not stick.
- *"I want to start with something you did really well: when the patient came in looking uncertain, you immediately made eye contact and greeted them by name. That set a great tone for the whole interaction!"*

MENTOR | Field Coaching | Feedback: How

2. REFLECT: Prompt reflection on the moment to improve

Rather than telling the receptionist what went wrong, guide them to revisit a specific moment and reflect on it - their response and the patient's reaction.

"I'd like us to look at one moment together. When the patient asked whether there was an active campaign for that test, I noticed your response. Do you remember what you said? And what did you notice about how the patient reacted?"

MENTOR | Field Coaching | Feedback: How

3. EXPLORE: Ask them to find a better solution

Invite the receptionist to think of a more effective alternative before you offer one. This builds problem-solving and ownership.

"Looking back at that moment - do you think there was a way to respond that might have sparked more interest or curiosity in the patient? What could you have said differently?"

MENTOR | Field Coaching | Feedback: How

4. GUIDE: Suggest the protocol if needed

If the receptionist cannot identify the alternative on their own, provide it - clearly, positively, and connecting it to the commercial protocol and the reason behind it.

"One approach from the protocol is to say: 'Actually, we do have an active campaign - let me show you what is included and how it could be relevant for you.' This works because it shifts the conversation from a yes/no answer to an opportunity to add value. The patient sees you as a guide, not just a reception desk."

MENTOR | Field Coaching | Feedback: How

5. COMMIT: Secure a specific commitment

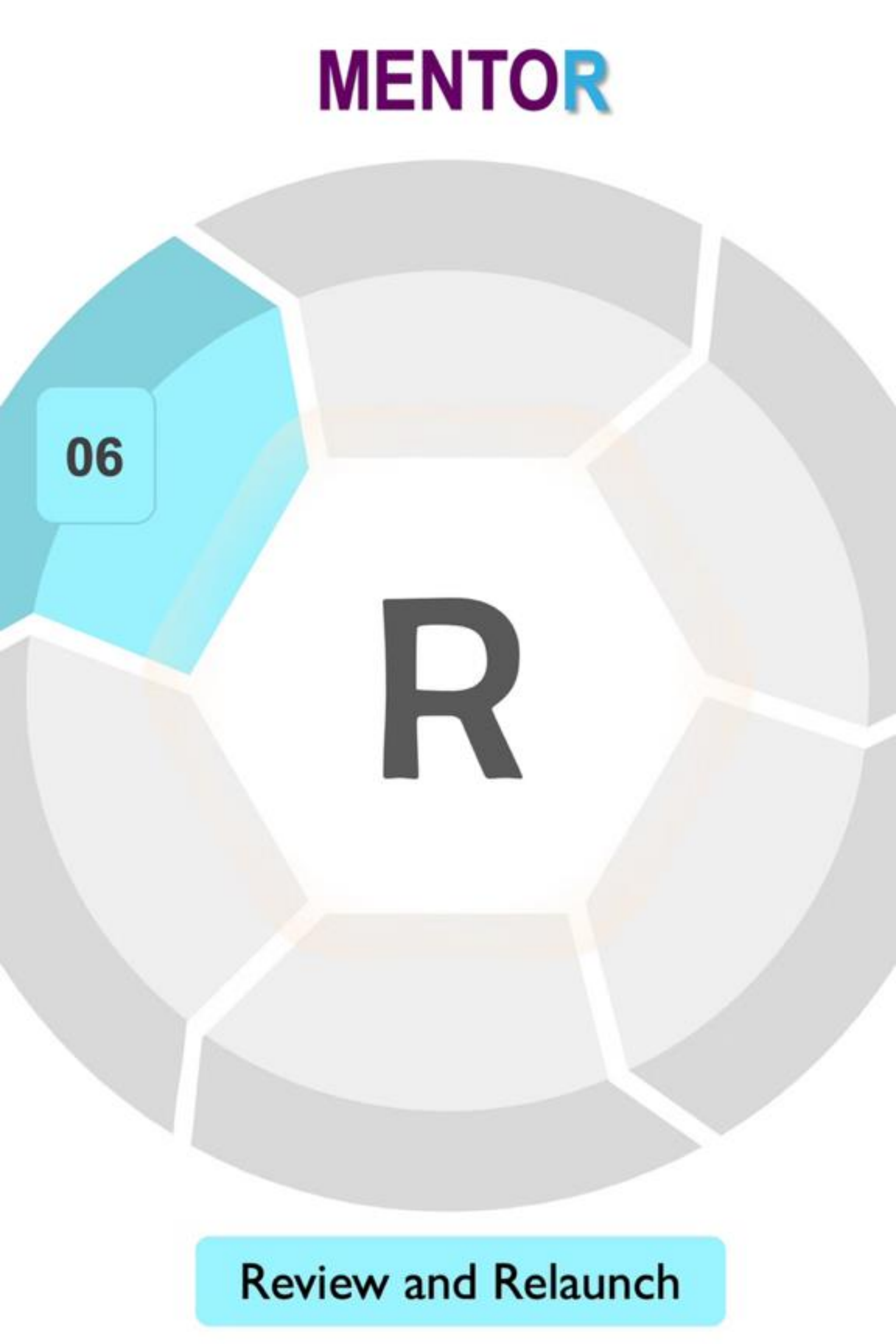
Close every feedback moment with a clear, personal commitment from the receptionist. Not a vague 'I'll try' - a specific 'next time I will...'.

"So, for the next patient interaction that involves a campaign question - what is the one thing you commit to doing differently? I'd like to hear it from you."

MENTOR | Field Coaching | Feedback: How

5. COMMIT: Secure a specific commitment

Agree on strengths	Agree on improvement areas	Take action
So we agree that the strengths are ...	... and the areas for improvement are ...?	Let's do / try ...!



MENTOR

Review and Relaunch:
Final Assessment and Plan Conclusion

STEP R – REVIEW AND RELAUNCH

RETAIL EXCELLENCE ACADEMY

MENTOR | Final Assessment |

Reinforced in Weekly Meeting

Objectives of the End-of-Plan Interview

1

Review objectives and action plan

Review the shared **objectives** and the **action plan** (what went well and what went wrong?)

2

Share results

3

Evaluate commitment

Evaluate and share the **site team member's commitment**

4

Premises for the new MENTOR

The premises of the new MENTOR, with particular attention to the "M"

💡Review is not the end of the cycle: it feeds the next month’s visit plan, priorities, and coaching focus

MENTOR | Final Assessment | Key Success Factors

For the end-of-plan evaluation meeting, the same logic applies as for the Coaching Plan meeting.

Pre-Meeting

Preparation activities to be completed before the meeting takes place

Meeting

Activities and dynamics to be managed during the meeting itself

MENTOR | Final Assessment | Key Success Factors

Pre-Meeting

Have I achieved the coaching objectives?

Critical review of the plan ("N")

Confirm the commitment of Coach and site team member

Logistics (location + timing and agenda)

Meeting

Create the right climate

Define the agenda

Request a self-analysis on:

- Achievement of coaching objectives ("E")
- Implementation of the plan ("N")
- Level of commitment on Deal

Integration with the Coach's observations

Prepare the new "MENTOR"

SYNLAB

MANAGER COACH | PART 05

30.01.2026

APPLY MENTOR IN A REAL AREA MANAGER SCENARIO

Exercise 9 Final Role Play

Winch

Agenda

1. The Fundamentals — PART 01

- Leadership and Management
- What is "Coaching"
- Coaching, motivation and change
- Coaching and relationship
- Coaching and performance

2. Area Manager: Expected Behaviours — PART 02

3. MENTOR | Coaching Model — PART 03

- **M**apping the Baseline
- **E**xploring Root Causes
- **N**avigating the Journey
- **T**ransparent Objectives

PART 04

- **O**n-the-Job Execution
- **R**eview and Relaunch

4. Final Role-Play — PART 05

Final Role Play | Apply MENTOR in a Real Area Manager Scenario

Objective

Apply the MENTOR model to a realistic Area Manager situation and connect coaching decisions to a typical day in the life of an AM.

Scenario

You are visiting one of your sites during a **Commercial Follow-up Visit** in the morning peak. While observing the front-desk interaction, you notice that the receptionist is polite and efficient, but inconsistent in three areas:

- she does not always explain the next steps clearly to patients
- she rarely checks or updates contact details
- she misses opportunities to introduce relevant additional services naturally

Patient flow is fast, the site is busy, and the Site Leader tells you that the team is under pressure and mainly focused on speed.

Your task

Work in pairs or small groups. One person plays the **Area Manager**, one person plays the **collaborator**, and one person can act as **observer**.

Use the **MENTOR model** to manage the coaching conversation.

Exercise 9 - Final Role Play

Step 1 – Map the situation

Before starting the conversation, define the following:

1	**What type of visit is this?** Identify the context and purpose of your presence on site today.
2	**What behaviours are you observing?** Note specific, factual behaviours at the front desk during the morning peak.
3	**What is working well?** Recognise the strengths — the receptionist is polite and efficient.
4	**What needs improvement?** Identify the three inconsistent areas observed during the interaction.
5	**Why does this matter?** Connect the gaps to service quality, sales outcomes, and overall patient experience.

Exercise 9 - Final Role Play

Step 2 – Apply the MENTOR Model

Structure your role play using the MENTOR logic:

M – Map the baseline

Describe the current situation using only observed facts.

E – Explore the causes

Discuss what may be driving the behaviour: habits, pressure, lack of confidence, lack of focus, unclear priorities, or limited awareness.

N – Navigate priorities

Choose the **one priority behaviour** that would make the biggest difference if improved first.

T – Transparent objective

Agree on a clear development objective for the collaborator.

O – Operational action

Define 2–3 practical actions to apply immediately **between visits**.

R – Review and relaunch

Decide how progress will be reviewed: during the next visit, through self-monitoring, or in the **Weekly Meeting**.

 Exercise 9 - Final Role Play

Role Play Output

At the end of the exercise, each group should be able to present:

Observed Strengths

Highlight what the collaborator is already doing well to acknowledge and build upon.

Selected Improvement Area

Identify the one priority behaviour chosen as the primary focus for development.

Agreed Coaching Objective

Define a clear, shared development objective established with the collaborator.

Practical Actions

List the 2–3 specific actions the collaborator will practise between visits.

Weekly Meeting Reinforcement

Define how the Weekly Meeting will be used to sustain improvement.

Next Visit Verification

Outline the concrete checkpoints the Area Manager will use to assess progress.

Exercise 9 - Final Role Play

Debrief

Discussion questions

From observation to diagnosis

How did the AM move from observation to diagnosis?

Avoiding the inspector trap

How did the AM avoid sounding like an inspector?

Specificity of the action plan

Was the action plan specific enough?

Connection to real visit routine

How was the coaching conversation connected to the AM's real visit routine?

Role of the Weekly Meeting

What role does the Weekly Meeting play in making improvement stick?