# Basic Branching Scenario Script
Written by Jenella Lindauer

**Coach Introduction:**

Hello! My name is Daniel, and I will be your coach. In this simulation you will be leading a meeting with two team members from your team to ensure that the roles and responsibilities for sending status updates to clients is clear. You are having this discussion due to a client that works with Global Consulting that contacted you to find out why the status update was not sent by your team.

**Learner Options**

**Learner Optimal Response:**

Hello Trish and Robert, I wanted to meet with you to go over the roles and responsibilities for sending status updates to the clients since one of them called today to let us know that a recent status update was not sent.

**Coach Optimal Feedback:**

That was a good start to the meeting and letting Trish and Jake know what you would be discussing with them.

**Team Member Optimal Response:**

Robert: Ok
Trish: Was there an incorrect status report sent out?

**Learner Suboptimal Response:**

Hi Trish and Robert. So, I wanted to get with you to discuss what the client expects from status updates.

**Coach Suboptimal Feedback:**

That wasn't a bad start to the meeting, but clearly setting the expectations for your team members would have helped more.

**Team Member Suboptimal Response:**

Trish: You just explained the status reports to us last month. Was something missed?

**Learner Critical Response:**

Hey all. Just wanted to re-iterate why you need to send status updates.

**Coach Critical Feedback:**

You haven't really let your team members know why you want to speak with them about status updates. Be more informative so your team members can be more prepared.

**Team Member Critical Response:**

Robert: Why are we going over this information again?
Trish: We send out the status reports to let the clients know where we're at on their projects. Is there something else we needed to know?

**Learner Options**

**Learner Optimal Response:**

A client did not receive their status report to keep them apprised of their project. I want to bring in the team to remind you of what your role is with the status reports, and when they should be sent. I won't be discussing any specific clients right now.

**Coach Optimal Feedback:**

You let Robert and Trish know that you want to remind the team of what's required and didn't bring up any specifics as to not point the finger at anyone specifically.

**Learner Suboptimal Response:**

A client didn't receive their status report today so I just want to re-iterate why it's important and when you should send them.

**Coach Suboptimal Feedback:**

You did let Robert and Trish know that a status report hadn't been sent, but you could have been more specific in what you wanted to discuss with them.

**Learner Critical Response:**

I'm going over this again because our client working with Global Consulting didn't receive their status update so I wanted to inform you both on why you should be sending those reports out.

**Coach Critical Feedback:**

You don't want to bring up the specific client in the group meeting since Trish and Robert know who services which clients. You just want to provide them with the information to fix the mistake going forward.

**Learner Options**

**Learner Optimal Response:**

Going forward, you need to remember to send one to your client each week. If it helps you out, you can make a calendar reminder so you won't forget to send it to your clients, and you will have dedicated time to put the information together. You need to make sure that each client receives their status report in the timelines that we've provided them. If not, there is a possibility of losing clients. Do either of you have any other questions on the status reports?

**Coach Optimal Feedback:**

You let Robert and Trish know why they need to send the status reports and a simple solution to help them remember when to send them to the clients, while also letting them know potential consequences of not sending them in a timely manner.

**Team Member Optimal Response:**

Trish: No questions for me. I'll start making a calendar reminder moving forward.
Robert: Yeah, nothing else comes up for me. Thanks for letting us know and giving us a solution to help out.

**Learner Suboptimal Response:**

Each client needs to receive their weekly status reports to ensure that they can stay up to date on the project status. This ensures that our client stays happy with our services and continues business with us. You need to figure out some method to make sure you do this on time, so we retain our clients. Do you have any questions about the status reports?

**Coach Suboptimal Feedback:**

You let Trish and Robert know why the clients need to get their status reports each week, and the potential consequences of not doing it. You could have also given them a simple solution to help them plan for it each week.

**Team Member Suboptimal Response:**

Robert: Nothing from me. Thanks for letting us know about the status reports.
Trish: I don't have any questions at this time. If I do later, I'll reach out to you.

**Learner Critical Response:**

You have to send out the status reports on time to each client, every week, so that we can retain the clients that we have. However you want to do it is fine, but you just have to send them out so we can keep the clients that we have. Any questions?

**Coach Critical Feedback:**

You let Robert and Trish know that they should send the status reports to the clients and that there could be consequences. However, you left it very open ended as to how they should go about planning for this each week.

**Team Member Critical Response:**

Trish: Ok, we still need to send out the status reports. Thanks for the update.
Robert: Yeah, thanks for the reminder.

**Coach Conclusion:**

You want to be able to lead the meeting and give your team members the facts, so as not to take up too much of their time. It is also helpful to give Trish and Robert a simple solution to help them to remember when the status reports need to go out. With setting these expectations the clients will not be missing any status reports in the future.