

Free QA Coaching Checklist

A practical guide to help managers and QA professionals prepare for effective, focused coaching conversation.

1

Review the Evaluation

BE PREPARED.
BE SPECIFIC.
DRIVE IMPROVEMENT

- ☐ Review the QA evaluation results.
- ☐ Identify the specific behavior or performance gap.
- ☐ Confirm the applicable policy, process, or expectation.
- ☐ Note any compliance, customer-impact, or risk concerns.
- ☐ Gather specific examples from the interaction.

2

Identify the Root Cause

UNDERSTAND
THE WHY.

- ☐ Skill gap
- ☐ Knowledge gap
- ☐ Behavior issue
- ☐ Process issue
- ☐ Communication issue
- ☐ Other: _____

3

Prepare the Coaching Objective

SET A CLEAR
FOCUS.

What needs to improve?

What should the employee do differently?

What result should the coaching achieve?

 **Coaching Tip:**
Focus on the behavior, the expectation, and the next action– not just the score.

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Coaching Conversation & Follow-Up

Turning feedback into growth, one conversation at a time.

4

During the Conversation

LISTEN.
GUIDE.
BUILD SOLUTIONS.

- ☐ Explain the purpose of the coaching discussion.
- ☐ Review the specific example(s).
- ☐ Ask the employee for their perspective.
- ☐ Clarify the expected behavior.
- ☐ Explain why the expectation matters.
- ☐ Discuss the impact on quality, compliance, or customer experience.
- ☐ Agree on the corrective action or next step.
- ☐ Confirm employee understanding.

5

Follow-Up & Documentation

TRACK PROGRESS.
REINFORCE SUCCESS.

- ☐ Document the coaching discussion.
- ☐ Record agreed action items.
- ☐ Set a follow-up date.
- ☐ Monitor for improvement.
- ☐ Recognize improvement when demonstrated.
- ☐ Escalate repeated issues when appropriate.



Follow-Up Date: _____

Manager / Coach: _____

Employee: _____

*Effective coaching creates clarity, accountability,
and a clear path to improvement.*