

# THE TEN STEPS TO CONDUCTING AN EFFECTIVE COACHING AND CAREER DEVELOPMENT SESSION

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## INTRODUCTION

Ken Blanchard, author of the best-selling book, <u>The One Minute Manager</u> says, "Feedback is the breakfast of champions."

Successful management-leaders realize that coaching and career development is critical to attracting, retaining and motivating successful employees. The performance appraisal event is a misunderstood process. Often, it is not what is said or written, but how it is said and presented. This article presents successful techniques, strategies and communication scripts for communicating performance coaching information. With over 25 years of research and practice, the author has found that facilitating a successful coaching session is the single most important factor to employee retention, job satisfaction and productivity. This one-hour experience can lead to 2080 hours of personal satisfaction and align efforts to organizational excellence imperatives.

The ten steps to a successful coaching experience include:

Step 1: Define expectations for the job.
Step 2: Observe and record performance.

Step 3: Review previous objectives, measure progress and improvements.

Step 4: Engage in the self-review discussion

Step 5: Practice proper skills in verbal and non-verbal communication

Step 6: Properly introduce the appraisal and set the parameters
Step 7: Apply proper techniques for communicating information

Step 8: Engage in a career development discussion

Step 9: Set objectives and action plans

Step 10: Set milestones and deliver on what you promise

Throughout this document, I may use the term "coaching and career development process" or "performance appraisal." Use whatever term of art makes sense for your organization. It is my experience that approaching this feedback event on the basis of a constructive coaching and career development method tends to produce the same outcome of measuring performance in a more positive, constructive and successful acceptance factor for the manager-employee relationship.

Please review the document and follow the suggested script. Give us a call at 707.748.7550 or visit our website at www.bienati.com for additional support information.

Good luck on your journey!

Lawrence M. Bienati, Ph.D.

Larry Bienati

## THE COACHING PROCESS SCRIPT

#### Before the Coaching or Appraisal Session

#### Step One: Define expectations for the job.

- Is there a job description? Duty statement? Key Objectives?
- Have expectations of fully successful performance been communicated? How? When? Are they documented?
- Are you confident that the employee knows what is expected?

#### Step Two: Observe performance.

Have you conferred with other managers or operations personnel with whom this person is likely to work? Do you have specific behaviors to support the ratings and agreements on the appraisal form?

# Step Three: Review objectives established from previous coaching sessions, if applicable.

Were the objectives achieved? Not achieved? Partially achieved? Are there any developmental areas established in the last review that require review? Remember that the coaching process is ongoing; while performance is reviewed daily, weekly, quarterly. There should be no surprises during the performance review. One should not save all the problems occurring in the previous 12 months and unload them during the coaching session. Problems or other issue should be addressed when they occur.

#### Step Four: Allow the employee to prepare a self-appraisal.

Meet with the employee one or two weeks prior to the coaching session. Make sure they understand the review form and how the process works within CSI. The following communication is suggested for a typical self assessment process:

like you to complete an assessment of how you see your performance as it	
relates to the skill/competency areas on the review form. I'd also like you to	
identify skill areas that you feel identify your major strengths plus any skill areas	3
where you feel additional development may be necessary. Be prepared to	
discuss the progress in previous objectives or developmental areas established	ł
in our last review and specific development goals you are thinking about in the	
next 12 months. We will also be discussing your career development	
expectations. Please complete the form I will provide see attachment 6. (Note	:
In some organizations this may be only basis of the self-appraisal	
process).	

Notes:

#### Opening the Coaching or Appraisal Meeting

Step Five: The following verbal and nonverbal skills are important when setting the proper climate factors for the evaluation.

- 1. The goal of the coaching session is to maintain a relaxed mood so that proper communication and trust will occur. This relaxed mood is related to how you present your communication in both the verbal and nonverbal sense. It is important to realize that this is not a "military inquisition." You are conducting a business meeting to provide feedback to your employee on job performance. Be yourself!
- 2. The following *non-verbal signals* are important:
  - a. *Eye Contact*. Look directly at the employee when speaking; nod your head; smile when appropriate; display interest.
  - b. **Nearness**. Sit at a close, comfortable distance. Avoid sitting behind large desks.
  - c. **Posture**. Sit straight; be attentive; maintain a symmetrical posture with employee.
- 3. The following verbal presentation skills are important:
  - a. **Small Talk**. "Break the ice" initially; talk about family, a recent happening. Each employee is different; use whatever approach will build rapport and reduce nervousness. Some employees prefer a direct "strictly business approach" and it important to understand and respect how your employee will process information.
  - b. *Prods*. Acknowledge listening. "Uh huh...I see...Hmmm...Go on...Tell me more about that." Use open-ended questions like why, how, when, where; get employee to talk *(Please refer to the constructive conversation catalysts in Attachment 1).*
  - c. **Speak Positively**. Compliment; show appreciation; acknowledge where appropriate.

#### The Coaching or Appraisal Session Begins

Step Six: State purpose and objectives of the appraisal.

- 1. The primary purpose of a coaching session is four-fold:
  - Provide feedback on performance
  - Increase job satisfaction and productivity
  - Help strengthen the employee's competency and skill areas
  - Develop a career plan (if desired)

#### The following communication script is suggested:

"\_\_\_\_(name), we have both had an opportunity to complete our appraisal or coaching forms (whatever is preferred via the form employed)."

"The best way to conduct this meeting today is to have you present your self-appraisal first by reviewing each skill area one at a time. Once you have done this, I would like you to identify the skill areas you feel may need additional development. While you are doing this, I will be listening and recording some notes. Where appropriate, I may ask you question to clarify your responses."

"After you present your assessment, I will present my assessment of the skill areas. We will address the skill areas where we have agreement first, followed by the skill rating where we differ. We will openly discuss these areas in an effort to reach consensus."

(Note: This self assessment process may differ based on the organization and the forms employed. The basic process is the same in terms of the conversation)

"Finally, we will review previous accomplishments/objectives established during the last review. We will then set the necessary objectives to strengthen any developmental areas. Do you have any questions, \_\_\_\_? (Allow time for response). Okay, let's proceed..."

<u>Note:</u> You will find this approach to be quite effective. There is a higher level of commitment when the employee is allowed to participate. They will generally identify developmental areas first and tend to underrate their skills.

#### Step Seven: Techniques for Presenting Information

The following techniques may prove helpful in presenting information during the performance appraisal. You may reference the attachment entitled "Cause and Effect Relations in Three Types of Appraisal Interviews." (C.O.R.E. Corp., 1987)

At this point of the appraisal, the employee has presented his or her assessment. There will be areas of agreement and (perhaps) disagreement. The areas of agreement are easy; the challenge comes in communicating areas of disagreement in such a way that the employee will accept your recommendations. The following approaches, or combinations thereof, may be helpful:

- The Tell-and-Sell Technique. This is used to persuade an employee to improve. This may be used nicely in skill areas where both parties have agreement. The employee is aware of developmental areas and wishes to correct them. You provide evidence and counsel on how the employee can change behavior for the better.
- 2. **The Tell-and Listen Technique**. The employee is defensive and may disagree with an aspect of the evaluation. Use listening rather than selling skills. People will change if defensive feelings are released. Make a statement to the employee about the behavior; allow employee to comment; ask probing questions; summarize feelings. Once both parties understand each other, then agree on a way to correct the issue.
- 3. *The Problem-Solving Technique*. A helper of sorts. The employee does not recognize a problem in behavior or asks for your assistance in correcting. You will jointly analyze the problem together; probe for reasons; ask questions; make and ask for suggestions. Essentially, you jointly solve the problems together and develop an action plan to correct it.

<u>Note</u>: These techniques may work in tandem; that is, a tell-and-listen technique may work into problem solving. Or, a tell-and-listen may work into a tell-and-sell if there is no agreement. It all depends. *(See attachment 3)* 

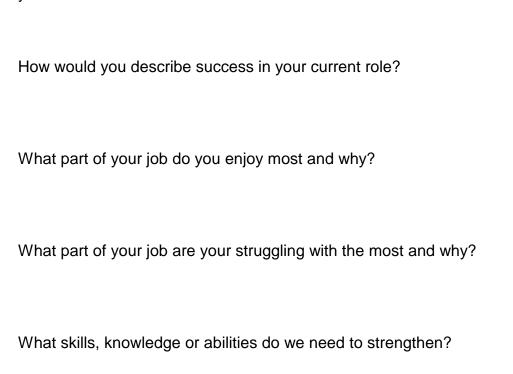
Suggestion: We are finding the motivational coaching, problem solving checklist has proven to be another powerful tool as well. Please refer to attachment 5. This line of questioning has proven most effective in engaging the employee in collaborative development solutions.

Notes: Special, challenging issues (to be discussed in workshop)

#### Step Eight: Discuss Career Development Objectives

This is perhaps the most important part of the session. It is time to focus on the person and their career needs and aspirations. Before you move to pure goal setting, ask these questions of the employee. Suggestion: You may also decide to have the employee's complete this self assessment form before the appraisal event. This collaborative process outlined below enhances the coaching and career development process by ensuring successful alignment of the manager-employee relationship.

How can I improve my effectiveness as your supervisor ensuring your success in your current role?



Looking down the road, let's say three years or so, what do you think would be the perfect role for you? Why?

Given you stated desires and growth objectives, what steps can we take today and what resources can we provide to you to your personal and professional objectives with the company? (This question is the basis for starting the action plan development)

It is important to close the interview on a positive note. Set the date for the next review and set up a monitoring system for goal achievement. Advise the employee that you will be transferring information to a new form, and they will be allowed to offer comments.

#### Step Nine: Set Objectives and Develop Action Plans

You have now reviewed the forms, discussed ratings, agreed on some initial action and hopefully engaged in some career discussions. Once you have reviewed each skill area and reached some form of consensus, you are ready to establish developmental goals. Do not be disappointed if the employee does not agree with your recommendations despite all of these wonderful strategies I shared. You may have to change the focus and simply provide direction on what you expect. Try and turn things into a positive format by demonstrating your sincere willingness to help them strengthen any developmental areas.

(See Constructive Conversation Catalysts, Attachment 1).

- 1. Allow the employee to discuss the goals they had set prior to the evaluation. Have the employee explain:
  - What is their goal (in specific terms)?
  - How can it be achieved?
  - When do they expect to achieve it?
  - Why it is important to their continued success?
- 2. Once the employee identifies the goals (some may not), then proceed with an explanation of your goals. Avoid directive phrases such as "you will." Use phrases like "I would like," "How do you feel about?" "What is your best estimate, Mary, on when we can achieve this?" If they agree, terrific. If not, present your goals. (Refer to attachment 2 entitled "Checklist for Setting Good Objectives." All goals should satisfy the four-step criteria established above.

#### Step Ten: Set date for next review and deliver what you promise

Monitor performance regularly to ensure goals are achieved. Don't wait until next year. Performance is evaluated daily. It has been said that feedback is the breakfast of champions!

Note: For challenging employee situations, please refer to the author's article, Rehabilitating the Problem Employee. You may request via email to larry@bienati.com.

## **ATTACHMENTS**

- **♦** Attachment 1: Constructive Conversation Catalysts
- ♦ Attachment 2: The Checklist for Good Objectives
- ◆ Attachment 3: Cause-Effect for Different Types of Appraisal Interviews
- ♦ Attachment 4: Common Performance Appraisal Errors
- ◆ Attachment 5: Motivational Coaching/Problem Solving Checklist
- ♦ Attachment 6: Coaching/Career Development Pre-Questions
- ♦ Attachment 7: Sample Action Plan: Sam Biotech

#### CONSTRUCTIVE CONVERSATION CATALYSTS

#### (Developed by Larry Bienati, Ph.D.)

The old phrase, "It's not what you said, but how you said it," probably accounts for a majority of verbal/nonverbal communication challenges. Here are some catalyst phrases to improve the communication event. Good luck.

#### For Giving Feedback and Suggestions

- "Would you be interested in discussing how...?"
- "May I share a few thoughts (feelings) with you about...?"
- "How do you feel about...?"
- "Would you be interested in the way I feel about..?"
- "Do you have any questions (concerns) about...?"
- "Are you aware that...?"
- "Would you like some input (feedback) about...?
- "Is this a good time to ask you about...?"
- "Do you have a few minutes to discuss...?"
- "Would you like me to elaborate on...?"
- "Does this information seem...?"
- "Am I making sense about...?"
- "Has anyone else expressed similar thoughts about...?"
- "Do you have any idea why...?"
- "Have you considered...?"
- "Do you think it might help if...?"
- "Would you prefer that I (or that I not)...?"
- "Is it possible that...?"
- "Have I said something that may have caused you to...?"
- "Am I sensing that you feel...?"
- "Would you like to think about what we've been discussing?"

#### For Receiving Feedback and Suggestions

- "Would you share your observations (feelings) with me about...?"
- "May I get your ideas on...?"
- "Would you mind letting me know how...?"
- "Are you saying that...?"
- "Do I understand that the point is...?"
- "Could you help me understand...?"
- "Is there anything else that...?"
- "Do you think it would help if...?"
- "Do you have any particular suggestions regarding...?"
- "Is it likely that...?"
- "Do you think this may be because I...?"
- "How do you feel about...?"
- "How do you think you (he/she/they) feel about...?"
- "Would I sound defensive if I said (asked)...?"

#### **Checklist for Good Objectives**

When preparing your list of possible objectives, when recording objectives, consider the following points:

- 1. Do the objectives contain the five critical elements? Are they (S.M.A.R.T) objectives?

  - ←Measurable
  - ←Attainable

  - ←Time-bound, result oriented dates
- 2. Is each objective stated as a result to be achieved?
- 3. Is the objective traceable to the goals and your responsibility?
- 4. Have you assessed the degree of difficulty for each objective? Do you have a reasonable balance of high risk and low risk objectives?
- 5. Have you thought about the major actions to be taken to achieve the objectives?
- 6. Completion dates: Have you identified potential problems and developed contingency plans?
- 7. Have you identified the consequences that your achievement of these objectives will have? (See attachment 7 for a comprehensive action plan sample)

# The Key to Good Performance Objectives v. Goals? (Sample approach)

A well written objective will state what results you expect to accomplish, how and by when.

#### **Example:**

**WHAT** (Specific) Mary, I feel you need to strengthen your public speaking ability.

**HOW** (Measurable) Attend a Toastmasters Course.

WHEN (*Time Bound*) By September 25, 2012

WHY (Result Oriented) This seminar will help you communicate more effectively with your

employees and increase your confidence in making presentations.

This approach should be followed when setting objectives on the performance appraisal form. This will ensure that the goal is properly communicated and completed.

# Cause and Effect Relations in Three Types of Appraisal Interviews

METHOD	Tell-and-Sell	Tell-and-Listen	Problem Solving
ROLE OF INTERVIEWER:	Judge	Judge	Helper
Objective	-To communicate evaluation -To persuade employee to improve	-To communicate evaluation -To release defensive feelings	-To stimulate growth and development in employee
Assumptions	-Employee desires to correct weaknesses if he knows them -Any person can improve if he so chooses -A superior is qualified to evaluate a subordinate	-People will change if defensive feelings are removed	-Growth can occur without correcting faults -Discussing job problems leads to improved performance
Reactions	-Defensive behavior suppressed -Attempts to cover hostility	-Defensive behavior expressed -Employee feels accepted	-Problem solving behavior
Skills	-Salesmanship -Patience	-Listening and reflecting feelings -Summarizing	-Listening and reflecting feelings -Reflecting ideas -Using exploratory questions -Summarizing
Attitude	-People profit from criticism	-One can respect the feelings of others if one understands them	-Discussion develops new ideas and mutual interests
Motivation	-Use of positive or negative incentives or both (Extrinsic in that motivation is added to the job itself)	-Resistance to change reduced -Positive incentive (Extrinsic and some intrinsic motivation)	-Increased freedom -Increased responsibility (Intrinsic in that interest is inherent in the task)
Gains	-Success most probable when employee respects interviewer	-Develops favorable attitude to superior which increases probability of success	-Almost
Risks	-Success most probable when employee respects interviewer	-Develops favorable attitude to superior which increases probability of success	-Almost assured of improvement in some respect
Values	-Perpetuates existing practices and values	-Permits interviewer to change his view in light of the employee's responses -Upward communication	-Both learn since experience and views are pooled -Change is facilitated

#### Common Evaluation Errors

In any evaluation process there is a tendency to make certain errors that can lead to inaccurate ratings. The following paragraphs present the six errors that evaluators are most likely to make when rating a participant.

#### 1. Contrast Effect

This is a tendency to compare an employee against other employees instead of according to the specific requirements of the job. To avoid contrast effect, concentrate on how the employee's performance compares to the behaviors listed in the skill guide.

#### 2. The Halo Effect

This is a tendency to allow one good (or bad) skill or characteristic about the employee to influence the overall evaluation. Remember that because one skill is good or poor, it does not necessarily follow that others will be the same. When evaluating a skill or competency, focus only on the employee's performance in that particular area.

#### 3. Stereotyping

This is a tendency to "over-generalize" about the characteristics of capabilities of a specific group. The evaluator must rate each employee solely on his or her observed performance.

#### 4. Similar-To-Me-Effect

This is a tendency to give some employees higher ratings (regardless of their qualifications) because they are similar to the evaluator. Alternatively, giving employees a lower rating because they are different than the evaluator can also be problematic. To avoid the similar-to-me-effect, rely solely on observed performance in making evaluations.

#### 5. Central Tendency

This is a tendency to play it safe and rate in the middle of the scale because you are not sure of your evaluation of the employee. Make sure you get the information you need to make confident rating decisions.

#### 6. Negative and Positive Leniency

This is a tendency to be too hard or easy in evaluations across all skills or competencies. To avoid this error, use frequent and distinct behavioral examples to both classify and rate dimensions.

#### 7. Cultural Misconceptions.

The World is "Flat" as they say as we now live in a global environment. Be sensitive to culture norms, preferences and diversity in presenting information. We will discuss this in the workshop.

# The Coaching Conversation "Problem-Solving an Issue"

- 1. The conversation opens with the coach asking the person coached how they can help by specifically asking them to define the issue or problem that requires a conversation. The coach advises the person being coached that they may be asking a series of questions to develop some context for the issue
- 2. The Coach begins with some questions:
  - A. What are you trying to achieve?
  - B. Why is this important to you?
  - C. What have you tried so far?
  - D. How has it worked/not worked so far?
  - E. What options do you see going forward?
  - F. What input would you like from me?
  - G. What is your "go forward" plan?
  - H. How can I support you?
- 3. Coach asks persons being coached if there is anything else he/she can do…check-in? Follow-up perhaps, etc.

Special thanks to colleague Tom Crane, Author, <u>Heart of Coaching</u>, FTA Press, 2006 for sharing aspects of his excellent model with Larry Bienati so others can appreciate his good work. This book is an excellent resource for this invaluable coaching process.

## **Self Assessment Questions**

# **Pre-Appraisal Meeting**

How can I improve my effectiveness as your supervisor ensuring your success in your current role?
How would you describe success in your current role?
What part of your job do you enjoy most and why?
What part of your job are your struggling with the most and why?
What skills, knowledge or abilities do we need to strengthen?
Looking down the road, let's say three years or so, what do you think would be the perfect role for you? Why?
Given you stated desires and growth objectives, what steps can we take today and what resources can we provide to you to your personal and professional objectives with the company? (This question is the basis for starting the action plan development)

# Objective Achievement Action Plan (Another Model of Action Planning)

Name: Sam Biotech Office: SF Date: 2/2/18

#### **OBJECTIVE:**

State the objective to be accomplished. (An objective is specific, measurable, achievable result oriented and time bound.)

To improve the effectiveness of my leadership style with staff based on 360-degree survey results

#### **OBSTACLES:**

List all the obstacles standing in the way of achieving your objective.

- 1. Lack of clarity in knowing company mission and organizational direction
- 2. Some team members reporting that they are not happy with their jobs. Some are having difficulty adjusting to and managing multiple priorities.
- 3. Lack of commitment from other team members to take the initiative to want to change
- 4. Lack of time on my part to spend quality time with staff
- 5. Lack of understanding of performance expectations
- 6. Good working knowledge of staff motivators

7.

8.

9.

10.

#### **ACHIEVEMENT VERSUS NON-ACHIEVEMENT:**

List below some of the consequences of failing to achieve your objective. Then list the rewards of achievement, both personal and/or the organization.

Rewards of Achievement Consequence of Non-Achievement		
Higher productivity with motivated staff	Staff turnover; falling short of expectations	
Improved systems and accountability	Impacts to other departments	

#### **ACTION STEPS**

List the action steps required to achieve your objective. Remember to draw on your own strengths as you develop your action steps.

Action Steps When	
1. Perform an upward appraisal on my management style	2/2/18
2. Review results of survey and identify opportunities	3/15/18
3. Communicate results to staff and share commitment	4/15/18
4. Meet with each team members; ID expectations; motivators	5/15/18
5. Begin initiating coaching and career development sessions	6/15/18
6. Synthesize data from meetings; begin action plans	8/15/18
7. Meet with HR and determine training resources	9/1/18
8. Initiate team building sessions with staff (outside facilitator)	10/15/18
9.	

#### **SUPPORT SYSTEM (Mentoring)**

List the people who will be assisting you on the job to achieve your objective.		
Who	Relationship	Support Wanted
	HR	Training Resources/job desc.
Larry Bienati	Consultant	Survey synthesis; teambuilding
Mary Jones	Supervisor	Mentoring; resource support

#### **EVALUATION PROCESS**

Indicate when, by whom and how your progress will be evaluated.

Who Relationship	How Evaluated	
Mary Jones	Supervisor	Feedback on performance
Larry Bienati	Consultant	Post survey; team building help
Staff	Staff	Feedback
HR	Support	Job descriptions; appraisals.

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#### Setting Effective Performance Objectives

By Larry Bienati, Ph.D.

I often ask managers to explain the difference between goals and objectives. Generally, confusion exists in these terms of art not only in the performance appraisal process but in the development and execution of a successful strategic business plan. In my opinion, the single failure in most performance appraisal discussions is a lack of understanding on how to establish effective performance objectives. Peter Drucker says, "What gets measured, gets done." It is time to cut through the MBA hype, the plethora of acronyms, or management flavor of the month, and get back to basics. We proceed.

**Scenario**: You are 45 minutes into the performance appraisal conversation and nearing the end. You have followed HR protocols and facilitated a successful appraisal in terms of the documentation, the conversation, the alignment of competencies and identified go forward development actions with your employee. You now move to the coaching part of the appraisal, generally listed on the back page of the form. Behold, you see a one-page descriptor that says, "Now, please identify three of four performance goals or objectives for the employee to work on in the next 6-12 months." Alas, what do you write? What do you say? Nirvana achieved: *Employee has accepted a need for continued improvement* yet the buck now stops with you and the employee to develop a relevant, meaningful, achievable and measurable development plan. But, where do you start?

What is a goal? The best way to describe a goal is simple: "It is a dream without a deadline." Most goals are stated in simple statements like:

Improve your project management skills

Increase our market share in the ASIA-PAC International Market

Become an employer of choice

Complete all engineering projects on time, on schedule and on budget

These goal statements are desirable and establish the 10,000 foot vision or idea of sorts. Even if you were developing a strategic business plan for example it is not uncommon to state a mission (your purpose), a goal (a desired direction) and an objective (measure to support the goal that is often a strategy supported by what, who when and why).

When it comes to successful performance appraisals, it is important to focus on developing objectives.

What is an objective? The best way to think of an objective is to ensure you meet the S.M.A.R.T. test. In simple terms:

S = Specific (stated in terms that both the employee and manager understand)

M =Measurable (a clear way to measure success)

A = Attainable (achievable but may have reach or stretch component to it)

R = Realistic (links to job description, expectation or mission of the business unit)

T = Time bound (has a date certain for completion and measurement)

Applying this S.M.A.R.T. process in developing performance objectives will ensure consistent, objective, verifiable and measurable improvement. An alternative to the S.M.A.R.T. model suggests answering four basic questions without getting lost in

translation of goals or objectives. Consider these questions in developing performance objectives:

- What needs to be done?
- How will it be done?
- When will it be done?
- Why is it important?

#### For example:

#### Development Goal #1

What? Improve your public speaking skills

**How**? Attend a Dale Carnegie Three Day Certification Process

When? By August 2018

Why? This will improve your self confidence, comfort in making group

presentations

#### Another example:

#### Development Goal #2:

What? Improve your interpersonal relations skills with coworkers and

customers

**How?** Attend a two-day seminar from Career Track on How to Handle

People with Tact/Skill

**When**? End of 1st Quarter 2018

**Why?** An essential part of your job description and our company core

values requires a commitment to building successful relationships, teamwork and respect. This program will help you strengthen these

areas for continued position success.

Finally, you may see concept of "outcome" appear on an appraisal. An outcome is simply another way of looking at a performance objective and drawing a conclusion on why it is of value. An outcome could be: "To save lives...To fulfill our corporate mission...to attract and retain the best in the industry." The outcome is "the why" of sorts as we explained in our 4-step model above.

Whether you have a programmed performance appraisal form with specific terms like goal, objective or even a blank sheet of paper, consider either setting SMART objectives or answer the four questions of what, how, when and why. Done correctly, you should see a dramatic improvement in the quality of the conversation, alignment of expectations, consistency, objectivity and more important, the development of a successful human resource. Good luck and stay in touch at <a href="mailto:larry@bienati.com">larry@bienati.com</a> or check in at 707.748.7550.