Coaching Card
A Template to Help with Assessments

LIFE CYCLE INSTITUTE

Process Audited:

Name: Position:

Coach's Name: Date:

Description of desired behavior:

Activities and Outcomes

1. Are the appropriate SMEs involved in the process?	Yes	No	Sometimes
2. Were Criticality scoring categories and ratings customized for site/company?	Yes	No	Sometimes
3. Are the Criticality levels matched with available levels in CMMS EAM?	Yes	No	Sometimes
4. Are updates audited to confirm accuracy in CMMS/EAM?	Yes	No	Sometimes
5. Was Asset Hierarchy information used to populate the Criticality Tool?	Yes	No	Sometimes
6. If SME scores vary widely, were the ratings discussed and reviewed for agreement and consistency?	Yes	No	Sometimes
7. Were category scores reviewed to verify that the entire scale of the category was used across the site (i.e. scores span the entire rating scale)?	Yes	No	Sometimes

Expected Results & Behaviors

	Yes	No	Sometimes
8. Have assets been ranked effectively?	Yes	No	Sometimes
9. Were assets updated correctly in the CMMS/EAM?	Yes	No	Sometimes

Recommendations

	Yes	No	Sometimes
10. Could this process be improved? (Follow-up notes)	Yes	No	Sometimes
11. Is the Criticality Assessment Tool performing as intended? (Follow-up notes)	Yes	No	Sometimes

Supporting Reports, Comments, Interviewer Notes