

**Coaching and Mentoring**

**Instructor Guide**

**Global Courseware**

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# Thank you for choosing Global Courseware!

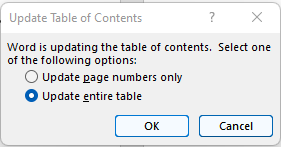
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide instructor guides, training manuals, PowerPoint slides, activities, exercises, quick reference sheets, and more. All you need to do is add your final preparations and deliver your training workshop!

Our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint (most word processing and presentation programs support these formats too). This means that you can customize the content, re-brand with your logo, change the color scheme and fonts and then easily print/e-mail your training materials as needed.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants’ industry, or additional information. You can also use all of your word processor’s other features, including text formatting and editing tools (such as cutting and pasting).

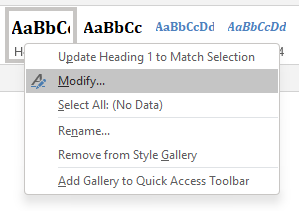
To remove modules, simply select the text and press **Delete** on your keyboard. Then, navigate to the **Table of Contents**, right-click, and click **Update Field**. You may see a dialog box; if so, click **Update entire table** and press **OK**. You will also want to perform this step if you add modules or move them around.



You can format any piece of text any way you want. However, to make it easy, you can use **styles** to update all the text at once.

In Word under the **Home tab**, right-click on your chosen style and click **Modify**. That will then produce the **Modify Style** options window where you can set your preferred style options.

For example, if you wanted to change our Heading 1 style, used for Module Titles, this is what you would do:



Now, you can change the formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to our Word Essentials course.

## Materials Required

All of our courses use a flip chart or whiteboard/chalkboard.

We recommend that each participant have a copy of the training manual and that you review each module before training to ensure you have any special materials required. Worksheets are included within the Appendix and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

* Laptop with projector, for PowerPoint slides
* Quick Reference Sheets for trainees to take with them
* Timer or watch (separate from your laptop)
* Masking tape
* Blank paper

## Maximizing Your Training Power

Our company is built for trainers, by trainers. Here are some of our tips to help you create an engaging and unforgettable experience for your participants.

* **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  + Use examples, case studies, and stories that are relevant to the group.
  + Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  + Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn through group discussions, and others need a hands-on approach. For more information, we suggest *Experiential Learning* by David Kolb.)
* **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of these tips and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
* **Make it relevant**. Participants are much more receptive to learning if they understand why they are learning it and how they can apply it to their work. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to the context of your participants’ jobs or daily lives.
* **Keep an open mind**. Many trainers find that they learn something each time they teach, so encourage two-way communication. Enjoy it, learn from it, and make the most of it in your workshops.

**And now, time for the training!**

# Module One: Getting Started

*What makes a good coach? Complete dedication.*

***George Halas***

You are in your office looking over your performance report and it happened again. Your low performing employee failed to meet quota this month even after you spoke with them about the importance of meeting goals. This employee has a great attitude and you know they can do better. You just do not know how to motivate them to reach the goal. Money used to work, but that has worn off. You are baffled and you know being frustrated makes matters worse. What do you do?

This workshop focuses on how to better coach your employees toward a higher performance. Coaching is a process of relationship building and setting goals. How well you coach relates directly to how well you are able to foster a great working relationship with your employees through understanding them and by creating strategic goals.

An easy-to-understand coaching model taught in this workshop will guide you through the coaching process. Prepare yourself to change a few things about yourself in order to coach your employees toward better performance.

## Housekeeping Items

Take a few moments to cover basic housekeeping items.

* If you need an opening or a way to introduce the participants to each other, utilize the Icebreakers folder to begin or between breaks during the day.
* Let participants know where they can find washrooms, break facilities, and fire exits.
* Ask participants to turn off their cell phones or at least turn them to vibrate. If they must take a call, request that they do it outside.
* Take this time to encourage the group to ask questions and make this an interactive workshop.
* Write the words Respect, Confidentiality, and Practice on a piece of flip chart paper and tape it to the wall. Explain to participants that in order to get the most out of this workshop, we must all work together, listen to each other, explore new ideas, and make mistakes. After all, that’s how we learn!

## The Parking Lot

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900057299[1].wmfExplain the concept of The Parking Lot to participants.

* The Parking Lot is a visible place where you will “park” ideas that arise which are not on the agenda, may be off topic, or are better addressed outside of the program.
* At the end of the session, we will review parked ideas and follow up, or make suggestions for your own investigation when you are back at work.

Suggestions for the trainer:

1. If you are working with a large group of participants, you may wish to nominate a recorder to park items as you are facilitating.
2. It’s a good idea to note the name of the contributor along with the parked item.
3. Items noted on the parking lot can be useful to you later as you plan future training sessions.

## Workshop Objectives

C:\Users\Kimmi\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\JVU559D0\MCj02934740000[1].wmfBefore you leave this session today, you should be more familiar with the topic of coaching your employees toward better performance. We have 10 objectives that will allow us to achieve the overall goal of becoming better coaches.

Here are our learning objectives for today:

* Define coaching, mentoring and the GROW model.
* Identify and set appropriate goals using the SMART technique of goal setting.
* Identify the steps necessary in defining the current state or reality of your employee’s situation.
* Identify the steps needed in defining options for your employee and turn them into a preliminary plan.
* Identify the steps to developing a finalized plan or wrapping it up and getting your employee motivated to accomplish those plans.
* Identify the benefits of building and fostering trust with your employee.
* Identify the steps in giving effective feedback while maintaining trust.
* Identify and overcome common obstacles to the growth and development of your employee.
* Identify when the coaching is at an end and transition your employee to other growth opportunities.
* Identify the difference between mentoring and coaching, using both to enable long-term development through a positive relationship with your employee.

## Action Plans and Evaluation Forms

Participant Action Plans and course Evaluation Forms are located on the following pages and in the Training Manual. Ask participants to fill these out throughout the day as they learn new things and have ideas on how to incorporate the topics discussed into their lives.

The action plan uses the SMART system. This means that your goals must be **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imely.

## Action Plan

| Module | Goal | Specific? | Measurable? | Achievable? | Relevant? | Timed? | Next Steps |
| --- | --- | --- | --- | --- | --- | --- | --- |
| One |  |  |  |  |  |  |  |
| Two |  |  |  |  |  |  |  |
| Three |  |  |  |  |  |  |  |
| Four |  |  |  |  |  |  |  |
| Five |  |  |  |  |  |  |  |
| Six |  |  |  |  |  |  |  |
| Seven |  |  |  |  |  |  |  |
| Eight |  |  |  |  |  |  |  |
| Nine |  |  |  |  |  |  |  |
| Ten |  |  |  |  |  |  |  |
| Eleven |  |  |  |  |  |  |  |
| Twelve |  |  |  |  |  |  |  |

## Evaluation Form

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Workshop Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | Workshop Instructor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
|  | | |  | | | | |  | | | | |
| Please rate the following items on a scale of one to ten, with one being abysmal, five being acceptable, and ten being perfect. | | | | | | | | | | | | |
| Workshop Room | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Workshop Facilities | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Instructor Knowledge | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Interactivity of Workshop | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Would you recommend this course to others? Why or why not? | | | | | | | | | | | | |
| Other thoughts you would like to share? | | | | | | | | | | | | |

## Pre-Assignment

Description: Description: C:\Program Files\Microsoft Office\MEDIA\CAGCAT10\j0234131.wmfThe purpose of the Pre-Assignment is to get participants thinking about the Coaching and Mentoring strategies they are already using and where they feel a need for improvement.

List three areas in relation to Coaching and Mentoring you feel you are strong.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List three areas in regards to Coaching and Mentoring where you would like to see improvement.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Pre-Test

1. What is coaching?
   1. Tutoring or instructing a person to achieve a specific goal or skill
   2. Tutoring or instructing a person to achieve general skills
   3. Teaching a person how to improve physical abilities
   4. Teaching a person how to improve skills using the sport analogy
2. Which of the following IS NOT one of the characteristics of coaches?
   1. They focus on one or two skills at a time
   2. Their interaction is planned and structured
   3. They are strict
   4. They are tutors and instructors
3. The key step of the GROW model is:
   1. Setting the goal
   2. Reality check
   3. Options developed
   4. Wrap it up with a plan
4. Which of the following IS NOT one of the benefits of setting goals?
   1. Coaching time is more efficient once goals are discussed upfront
   2. The coaching session is direct and avoids meandering
   3. The employees work faster
   4. Your message will come across clear, instilling confidence in your employees
5. Placing a marker at the starting point of your employee’s coaching journey is useful because:
   1. It enables you to determine and measure progress
   2. It enables your employee to determine and measure progress
   3. It enables both you and your employee to determine and measure progress
   4. It is just a formality
6. Which of the following questions is not useful for getting the picture of where you are?
   1. How often is this happening?
   2. When does it happen?
   3. What is the affect?
   4. Who is guilty for the problems?
7. Sharing the development of options will result in:
   1. B.A.G. results
   2. B.E.G. results
   3. B.I.G results
   4. B.U.G. results
8. In the acronym of the results of sharing the development of options, letter G refers to:
   1. Gaining
   2. Growth
   3. General
   4. Goals
9. What is the acronym of a process designed to approach the planning activity in a consistent and efficient manner?
   1. LAMA
   2. LANA
   3. LARA
   4. LADA
10. In the acronym of a process designed to approach the planning activity, the two A’s refer to:
    1. Applying and advising
    2. Applying and assessing
    3. Advantages and assess
    4. Advantages and assessing
11. Building trust must be:
    1. Established at least by force
    2. A sincere desire in you
    3. At least ostensibly if not sincere
    4. None of the above
12. Trust is accomplished by:
    1. Your thoughts
    2. Following certain rules
    3. Your actions
    4. Force
13. Which of the following statements is true?
    1. You are required to provide only the positive feedback
    2. You are required to provide only negative feedback
    3. You are required to provide both positive and negative feedback
    4. Feedbacks are not required, they are optional
14. A method of introducing feedback to your employee surrounded by praise is called:
    1. The feedback stew
    2. The feedback sandwich
    3. The feedback doughnut
    4. The feedback pizza
15. Which of the following IS NOT listed as the common obstacle we, as managers, create?
    1. Feels awkward
    2. Fear of confrontation
    3. Denial there is anything wrong
    4. Afraid employee will not respond
16. The basics of all needs are:
    1. The physical and the safety needs
    2. The physical and the social needs
    3. The safety and the social needs
    4. The physical and the growth needs
17. Which of the following statements IS NOT true?
    1. Determining if success is achieved is a crucial element to the coaching process
    2. If you fail to recognize success, you could hurt your coaching program
    3. Taking inventory of your employee’s accomplishments helps you to determine how well your employee has achieved success
    4. Regardless of the success, your employee should move into the next level after the coaching program
18. Which of the following IS NOT among the areas you should review when taking inventory?
    1. The behaviors your employee demonstrated during the coaching progress
    2. Your employee’s strengths
    3. Your expectations compared to how well your employee meets or exceeds your expectations
    4. Your employee’s speed of learning
19. Which of the following IS NOT a characteristic of coaching?
    1. The interaction usually is for a set amount of time
    2. Interaction is usually voluntary
    3. The goal is to produce a more immediate change or result
    4. The interaction is structured and meetings are typically confined to scheduled meetings
20. Which of the following IS NOT a characteristic of mentoring?
    1. The focus is on a particular job function developmental issue
    2. The goal is to develop areas that the protégé deems necessary for their development for future roles
    3. Interaction is less structured with more causal than structured meetings
    4. Relationship is usually long-term over an extensive period of time

## Pre-Test Answers

1. What is coaching?
   1. Tutoring or instructing a person to achieve a specific goal or skill
   2. Tutoring or instructing a person to achieve general skills
   3. Teaching a person how to improve physical abilities
   4. Teaching a person how to improve skills using the sport analogy

A coach tutors or instructs a person to achieve a specific goal or skill.

1. Which of the following IS NOT one of the characteristics of coaches?
   1. They focus on one or two skills at a time
   2. Their interaction is planned and structured
   3. They are strict
   4. They are tutors and instructors

Trainer, Instructor, Tutor, Focus on one or two skills at a time, Their interaction is planned and structured

1. The key step of the GROW model is:
   1. Setting the goal
   2. Reality check
   3. Options developed
   4. Wrap it up with a plan

The first step of the **GROW** model is the key step in the process. Setting the goal gives you and your employee direction and purpose.

1. Which of the following IS NOT one of the benefits of setting goals?
   1. Coaching time is more efficient once goals are discussed upfront
   2. The coaching session is direct and avoids meandering
   3. The employees work faster
   4. Your message will come across clear, instilling confidence in your employees

Setting goals are not intended to get your employee to work faster, but work better.

1. Placing a marker at the starting point of your employee’s coaching journey is useful because:
   1. It enables you to determine and measure progress
   2. It enables your employee to determine and measure progress
   3. It enables both you and your employee to determine and measure progress
   4. It is just a formality

Placing a marker at the starting point of your employee’s coaching journey enables both you and your employee to determine and measure progress.

1. Which of the following questions is not useful for getting the picture of where you are?
   1. How often is this happening?
   2. When does it happen?
   3. What is the affect?
   4. Who is guilty for the problems?

Asking who is guilty, or responsible for the problems, is not a useful question.

1. Sharing the development of options will result in:
   1. B.A.G. results
   2. B.E.G. results
   3. B.I.G results
   4. B.U.G. results

Sharing the development of options will result in B.I.G results

1. In the acronym of the results of sharing the development of options, letter G refers to:
   1. Gaining
   2. Growth
   3. General
   4. Goals

G= Growth

1. What is the acronym of a process designed to approach the planning activity in a consistent and efficient manner?
   1. LAMA
   2. LANA
   3. LARA
   4. LADA

LAMA is the acronym used to describe the planning activity.

1. In the acronym of a process designed to approach the planning activity, the two A’s refer to:
   1. Applying and advising
   2. Applying and assessing
   3. Advantages and assess
   4. Advantages and assessing

Applying and assessing

1. Building trust must be:
   1. Established at least by force
   2. A sincere desire in you
   3. At least ostensibly if not sincere
   4. None of the above

Building trust must be a sincere desire. It requires an investment in time and emotion. Anything less will not foster a trusting relationship between you and your employee.

1. Trust is accomplished by:
   1. Your thoughts
   2. Following certain rules
   3. Your actions
   4. Force

Trust is built over time and is accomplished through your actions.

1. Which of the following statements is true?
   1. You are required to provide only the positive feedback
   2. You are required to provide only negative feedback
   3. You are required to provide both positive and negative feedback
   4. Feedbacks are not required, they are optional

Although building trust is a personal investment you must make, you are still required to provide both negative and positive feedback.

1. A method of introducing feedback to your employee surrounded by praise is called:
   1. The feedback stew
   2. The feedback sandwich
   3. The feedback doughnut
   4. The feedback pizza

The Feedback Sandwich is a method of introducing feedback surrounded by praise.

1. Which of the following IS NOT listed as the common obstacle we, as managers, create?
   1. Feels awkward
   2. Fear of confrontation
   3. Denial there is anything wrong
   4. Afraid employee will not respond

The common obstacles mentioned were: Do not have enough time to coach properly. Lack of confidence in coaching. Fear of confrontation. Feels awkward. Fear of failure in coaching. Afraid employee will not respond.

1. The basics of all needs are:
   1. The physical and the safety needs
   2. The physical and the social needs
   3. The safety and the social needs
   4. The physical and the growth needs

The basics of all needs are the physical and safety needs. If a person is lacking in either of these areas, they will find it difficult to progress further into the higher needs.

1. Which of the following statements IS NOT true?
   1. Determining if success is achieved is a crucial element to the coaching process
   2. If you fail to recognize success, you could hurt your coaching program
   3. Taking inventory of your employee’s accomplishments helps you to determine how well your employee has achieved success
   4. Regardless of the success, your employee should move into the next level after the coaching program

Your employee should only move on when they have mastered the first step/goal.

1. Which of the following IS NOT among the areas you should review when taking inventory?
   1. The behaviors your employee demonstrated during the coaching progress
   2. Your employee’s strengths
   3. Your expectations compared to how well your employee meets or exceeds your expectations
   4. Your employee’s speed of learning

Everyone learns differently, and at different speeds. It would not be fair to judge your employee’s speed of learning.

1. Which of the following IS NOT a characteristic of coaching?
   1. The interaction usually is for a set amount of time
   2. Interaction is usually voluntary
   3. The goal is to produce a more immediate change or result
   4. The interaction is structured and meetings are typically confined to scheduled meetings

Voluntary interaction is a trait of mentoring.

1. Which of the following IS NOT a characteristic of mentoring?
   1. The focus is on a particular job function developmental issue
   2. The goal is to develop areas that the protégé deems necessary for their development for future roles
   3. Interaction is less structured with more causal than structured meetings
   4. Relationship is usually long-term over an extensive period of time

Focusing on a particular job function developmental issue is a trait of coaching.

# Module Two: Defining Coaching and Mentoring

*We are all capable of change and growth; we just need to know where to begin.*

***Blaine Lee***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900441521[1].wmfBefore getting deeper into the subject of coaching, it is prudent to discuss mentoring and its purpose. Understanding the difference between coaching and mentoring will help you be clear on your coaching objective. Many times, these two concepts are misunderstood.

The goal of this module is to define both concepts and introduce a coaching model that will allow you to focus on improving performance. Let’s begin by defining what coaching is.

## What is Coaching?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900056811[1].wmfA coach tutors or instructs a person to achieve a specific goal or skill. In baseball, a batting coach only focuses on the mechanics of hitting the ball. They spend time instructing the hitter how to change their swing to improve their performance. They give exercises and goals to the hitter that target the swing of the bat.

In the office environment, you may see similar coaches helping others improve a skill. They may be sales coaches or customer service coaches. No matter what the area of focus is, a coach specializes on improving one or two areas of development at a time.

Here is a recap of the characteristics of a coach:

* Trainer
* Instructor
* Tutor
* Focus on one or two skills at a time
* Their interaction is planned and structured

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify the characteristics of a coach. |
| **Lesson Summary** | Coaching is a tutoring and training process where specific behavioral or performance goals are reached. |
| **Materials Required** | * A deck of characteristic cards per table, some describing a coach and others describing mentor * Cut into two sections: [Worksheet 1: “A Coach is…”](#_Worksheet_1) for each table * Save the *Mentoring* half for the next exercise * Precut characteristics [Worksheets 2](#_Worksheet_2) and [Worksheet 3](#_Worksheet_3) * Power point slide or flip chart with instructions |
| **Planning Checklist** | * Make sure you have enough “Coach” cards for all tables |
| **Recommended Activity** | * Tell the participants that we they are going to be tasked in determining what coaching is by first defining a coach * Hand each table a “Coach” card * Hand each table a deck of [characteristics Worksheet 2](#_Worksheet_2) and [3](#_Worksheet_3) * Display the instructions * Give the teams 2 minutes to place however many characteristic cards they think belongs under the title card “A Coach is…” * Go over the answers below. A coach is :   + A tutor   + An instructor   + A trainer   + Focus on one or two skills at a time   + Interaction is planned and structured |
| **Delivery Tips** | Be sure to walk around the room, gauging participation, guiding participants and answering any questions they may have. Call time even if they were unable to determine which cards go under the coach category. |

## What is Mentoring?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900071116[1].wmfMentoring has a different purpose and goal. Mentoring is the act of guiding, counseling, and supporting. This is vastly different from coaching. It is fundamentally teaching. However, the objective is slightly different.

Mentorship is more voluntary in nature and is less formal than coaching. The mentor and protégé endeavor on a broad development goal, like becoming a leader. Mentoring encompasses many complex areas of development.

In your matching activity, we learned that coaching scenarios include the following:

* Sales
* Customer service
* Production work
* Behavioral issues like tardiness

Likewise, we learned that mentoring scenarios include the following:

* Networking
* Political strategizing
* Negotiation
* Managing

In this workshop, you will learn how to effectively coach; however, later, there will be a discussion on how to transition from a coach to a mentor. It should be a manager’s goal to develop their people in a way that furthers their career. Mentoring does this. For now, we are going to focus on coaching people for specific goals. The next lesson discusses an easy-to-remember coaching process.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify the characteristics of a mentor. |
| **Lesson Summary** | Mentoring is a guiding and support process where complex development goals are reached. |
| **Materials Required** | * Remaining cards from previous activity * A card for each table titled “A mentor is…” [Worksheet 1](#_Worksheet_1) |
| **Planning Checklist** | * Make sure enough mentor cards are printed for each table |
| **Recommended Activity** | * Hand out “A mentor is...” cards to each table * Tell participants to place the remaining card under the title card * After 5 minutes, Go over answers as a group |
| **Stories to Share** | *A round peg in a square hole needed a mentor*  *When I was in elementary school, I got interested in math because my teacher showed me how I could use it to build model airplanes. During high school, my interest developed further and when I went to university, I decided to study computer science and specialize in programming languages. Fortunately, I was involved in a few work experience terms and learned how I could apply my studies from university. The experience helped me to focus on the more specialized field of cross-platform technology and I was grateful for access to people who actually worked in the field. However, as I reflect back on my work as a student in the work place, I regret that I didn’t learn more about how the corporation worked, what they were trying to achieve, and how my work term fit in with their overall vision. I was good at the technical side of my job, but I pretty much felt like a square peg in a round hole. I wish that someone with experience at the corporation had taken me aside and talked about what I was learning, the future of my career there, and how what I was doing could be part of the larger picture.--D.K.* |
| **Delivery Tips** | If using story, say this is a comment made by a person who needed a mentor. |

## Introducing the G.R.O.W. Model

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900071371[1].wmfHaving a consistent and uniform approach to coaching enables you to coach more effectively with strategy and direction. Using a coaching model will also instill confidence in your employee, because they see a methodical approach. When we approach coaching haphazardly, we become disorganized and this creates frustrating coaching sessions.

The GROW model helps you organize your coaching process in a flow that identifies the goal first and ends with putting a plan together. Here are the details of the GROW model:

* **Goal setting**: a goal has to be set in order to give direction and purpose to the coaching session. Ambiguous goals are usually never achieved. Setting the goal first shapes your discussion with your employee and sets the tone.
* **Reality check**: both you and your employee must come to terms on the current state or level of performance or any issues that are causing breakdowns. Getting to the bottom of the problem begins with identifying it and claiming it. From there obstacles are better identified.
* **Options developed**: here you and your employee explore action steps that will help them improve their performance. Usually goals options that are prefabricated by an employee’s manager result in poor buy-in and missed goals. Allow your employee to explore options they develop.
* **Wrap it up with a plan**: once you nail down an option or two, it is time to strike it down on paper. If it is not written down, it won’t happen. Creating a well-defined plan is essential in order to know the direction you need to go and to demonstrate success or failure.

GROW is simple yet powerful. Following the GROW process consistently will develop a natural process for you. Coaching should be natural. This puts you and your employee at ease, making the process more valuable and rewarding. Let us unpack the GROW model over the next few modules and see how to incorporate it into our daily work lives.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will learn the meaning of the coaching tool acronym G.R.O.W. |
| **Lesson Summary** | GROW is a four phase process to coaching, which stands for the following:   * Goal setting * Reality check * Options developed * Wrap it up with a plan |
| **Materials Required** | * Sticky notes * Pens |
| **Planning Checklist** | * Make sure all tables have pens and sticky pads before session begins |
| **Recommended Activity** | * Have table groups choose a leader * Instruct groups to discuss challenges they currently face when coaching * Instruct leaders to jot down responses on a sticky note * Allow discussion for 4 minutes * Call time and have leader from each table share the team’s responses |
| **Delivery Tips** | When having the leaders share, go around each table round robin style. This way you give every table a chance to share before answers begin to repeat. |

## Practical Illustration

Sharon was assigned to coach a new employee named Brad who worked in the sales department. Brad had been promising as an applicant, yet his sales did not live up to expectations. Sharon decided to have a meeting to determine the problem and create a plan to resolve it. First they decided upon a goal, which was to boost his sales. Sharon found out from Brad that customers had a hard time understanding him through his accent, so they looked at their options. After weighing the choices, Brad decided to attend a speech class. They created a plan that outlined what his expected sales would be and how they correlate to his progress in speech class. Brad eventually was able to reach those expectations, and Sharon had successfully coached him.

## Module Two: Review Questions

1. What is coaching?
   1. Tutoring or instructing a person to achieve a specific goal or skill
   2. Tutoring or instructing a person to achieve general skills
   3. Teaching a person how to improve physical abilities
   4. Teaching a person how to improve skills using the sport analogy

A coach tutors or instructs a person to achieve a specific goal or skill.

1. Which of the following IS NOT one of the characteristics of coaches?
   1. They focus on one or two skills at a time
   2. Their interaction is planned and structured
   3. They are strict
   4. They are tutors and instructors

Trainer, Instructor, Tutor, Focus on one or two skills at a time, Their interaction is planned and structured

1. Which of the following statements IS NOT true?
   1. Mentoring is fundamentally teaching
   2. Mentorship is more voluntary than coaching
   3. Mentoring is less formal than coaching
   4. Mentoring is pretty much the same as coaching

A coach tutors or instructs a person to achieve a specific goal or skill. Mentoring is the act of guiding, counseling, and supporting.

1. Which of the following IS NOT included in mentoring scenarios matching your activity?
   1. Political strategizing
   2. Negotiating
   3. Behavioral issues like tardiness
   4. Managing

Coaching scenarios include the following: Sales, Customer service, Production work, Behavioral issues like tardiness.

1. In the GROW model, letter O refers to:
   1. Options developed
   2. Organization development
   3. Organizing
   4. Options revisions

**Options developed**: here you and your employee explore action steps that will help them improve their performance. Usually goals options that are prefabricated by an employee’s manager result in poor buy-in and missed goals. Allow your employee to explore options they develop.

1. The GROW model is a:
   1. Tutoring model
   2. Coaching model
   3. Mentoring model
   4. Universal teaching model

The GROW model helps you organize your coaching process in a flow that identifies the goal first and ends with putting a plan together.

1. The G in the GROW model is what?
   1. Growth
   2. Gain
   3. Goal
   4. Grasping

**Goal setting**: a goal has to be set in order to give direction and purpose to the coaching session. Ambiguous goals are usually never achieved. Setting the goal first shapes your discussion with your employee and sets the tone.

1. Understanding the difference between coaching and mentoring will help you be clear on your \_\_\_\_ objective.
   1. Mentoring
   2. Coaching
   3. A and B
   4. Neither A nor B

Understanding the difference between coaching and mentoring will help you be clear on your coaching objective.

1. As an example of coaching, a batting coach only focuses on the mechanics of \_\_\_\_\_\_\_\_\_\_.
   1. The player’s body
   2. The layout of the field
   3. Hitting the ball
   4. Running

In baseball, a batting coach only focuses on the mechanics of hitting the ball.

1. \_\_\_\_\_\_\_\_\_\_ is more voluntary in nature and is less formal than \_\_\_\_\_\_\_\_\_\_.
   1. Mentorship, coaching
   2. Goal setting, Coaching
   3. Coaching, goal setting
   4. Coaching, mentoring

Mentorship is more voluntary in nature and is less formal than coaching.

# Module Three: Setting Goals

*If you don’t know where you are going, you will probably end up somewhere else.*

***Lawrence J. Peter***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900055298[1].wmfWithout a goal, your chances of successfully coaching your employee to better performance are low. Defining specific, measurable, attainable, realistic, and time driven goals will plot a marker in the horizon that acts as your beacon. Without it, you are navigating blindly, causing frustration for both you and your employee, because you never seem to make any improvement. It becomes a constant cycle of failing to meet the goal and talking to your employee about it. This happens repeatedly without a well-defined goal.

This module will discuss setting **goals** with an easy-to-remember technique. This is the first component or the “G” of the **GROW** method of coaching. Let us explore what this is and how to develop it.

## Goals in the Context of GROW

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900354128[1].wmfThe first step of the **GROW** model is the key step in the process. Setting the goal gives you and your employee direction and purpose. You will find it very difficult if you were handed a bunch of tools and materials and told to build something without a clear vision or goal of what is to be built.

The same holds true for developmental goals. It is not good enough to tell your employee they must improve in sales or build widgets faster. These types of goals create more confusion because employees do not know where to start. Back to the building analogy, you may end up building a stool when what was really needed was as birdhouse. Clear goals are the cornerstone of the **GROW** model.

Here are some benefits to establishing goals upfront in the process:

* Both you and your employee have a better chance of starting in the right direction together.
* Coaching time is more efficient once goals are discussed upfront.
* You are able to plan ahead of the session and prepare targeted questions.
* The coaching session is direct and avoids meandering.
* Your message will come across clear, instilling confidence in your employees.

Now, since we established the importance and benefit of goal setting early in the coaching process, let us look at identifying appropriate goal areas.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will understand the benefits of developing the goal first in the  GROW model. |
| **Lesson Summary** | Developing the goal first sets a marker that will act as a guide for all future coaching activities. |
| **Materials Required** | * [Worksheet 4: Project Without a Goal](#_Worksheet_4)   + Worksheet contains following pictures     - Hammer, wood, paint, ruler, ladder and a drill   + Worksheet asks the following questions     - What are you building; how long will it take; where will it be located; how will you know you succeeded? * [Worksheet 5: Project With a Goal](#_Worksheet_5)   + Worksheet contains the same materials and questions as the previous worksheet.   + Project goal: develop shelter for a small aviary creature. |
| **Planning Checklist** | * Make enough copies of worksheets for all participants. |
| **Recommended Activity** | * Distribute worksheet *without* a goal and allow 2 minutes to complete * Ask, “How did not having a goal impact your ability to answer the questions?” * Encourage answers * Distribute worksheet *with* a goal and allow 2 more minutes * Ask, “How did having a stated goal impact your ability to answer the questions?” |
| **Delivery Tips** | Do not rush the debrief questions. This is the learning moment. |

## Identifying Appropriate Goal Areas

When coaching, it is a temptation for you to talk more because we have plenty to say. However, in order to gain information and identify appropriate goal areas, you must listen more. Remember, you have two ears and one mouth. Listen twice as much as you talk. Your objective here is to “catch” as much information as possible to help you determine what specific areas you can leverage and in which you can achieve results. Many times, allowing your employee to achieve even the smallest of goals begins the positive reinforcement of coaching. At some point before your actual coaching session, you want to engage in a brief discussion with your employee to determine their personal goals.

Here are some questions you should ask during your pre-coaching meeting. Remember to write down their answers for your reference later:

* What goals are you working on right now?
* Where are you in relation to those goals?
* What do you think is keeping you from reaching this goal?
* How will you know you reached that goal?

Asking these open-ended questions starts a conversation about your employee, which is what you want to achieve. Allowing your employee to speak more enables you to gather more information. Asking questions about their goals reveals their desires and this is something you can tie in to your coaching goal. Maybe an employee is furthering their education by going to college at night. Understanding this, you may be able to motivate your employee to achieve better performance, leading them to make more money they could use to fund their educational needs.

Furthermore, understanding where they are in relation to their goals reveals needs that may need support from you. Helping your employee with their personal goals builds a great working relationship. Finally, determining what roadblocks are preventing them from reaching their goals will provide insight into their personal circumstances. Granted, you may not solve all of your employee’s problems, but demonstrating empathy goes a long way and helps to form goals for you that take into consideration your employee’s personal situation. Remember, your employee does not care how much you know until you show how much you care. Listen more and talk less.

One final note, at first you may find asking questions challenging. This is normal. Give it time and do not give up. You may even have to let your employee know that you are interested more in their personal goals as a way to help them reach goals at work.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand the importance identifying appropriate goal areas. |
| **Lesson Summary** | Asking questions and listening to their employee’s desires and goals in a pre-coaching session helps to develop goals that are more meaningful and have a better chance of being met by the employee. |
| **Materials Required** | * [Worksheet 6: Pre Coaching](#_Worksheet_6) * Power point, or write it on flip chart   + What goals are you working on right now?   + Where are you in relation to your goals?   + What do you think is keeping you from reaching this goal?   + How will you know you reached that goal? |
| **Planning Checklist** | * Print two pre-coaching worksheets per participant * If using flip chart, have it prepared before class |
| **Recommended Activity** | * Hand out pre-coaching worksheet * Show questions on power point or flip chart * Instruct the participants to write the name of the employee they wish to coach immediately after the workshop. * Have participants pair up and take turns asking each other the questions on the, writing responses on second worksheet * Ask the following debrief question :   + What kind of answers did you get? (target; More details, reveal life circumstances that could impede achieving goal)   + What benefit do you get from asking questions of your employee? (Target: I listen more than talk) |
| **Delivery Tips** | Walk around room and encourage the person asking questions to talk less and listen more. |

## Setting SMART Goals

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\39XQYYJK\MC900335661[1].wmfWriting goals can be a daunting task if done without a particular format or process. After you have your pre-coaching meeting with your employee, you are ready to meet again with your employee and write a clear goal, starting the GROW process. Having a clear format and goal development process will enable you to create an effective goal. SMART is the technique you want to use when building the goal with your employee. It outlines your goal in an easy and clear format that your employee will find useful.

SMART stands for the following goal characteristics:

* **Specific**: What needs to be done? The goal must be clear. It cannot be a general statement like be better at sales or be more organized. Use action verbs like increase sales or use a calendar. Next, we need to put some measurement in place.
* **Measurable**: Place some form of measurement that is easily verifiable to the goal. For example, continuing with the last example, increase sales by 3 percent or use a calendar two times a week. When you have a number incorporated to the goal, it makes it easier to check progress and hold your employee accountable.
* **Attainable**: Make sure the goal is not too much at one time to complete. Setting huge goals will lead to failure because the employee will see it as impossible. In addition, assess your employee’s attitude. Use the information gained from your questions to help make this goal relevant. Irrelevant goals are not done. Make the goal manageable yet challenging.
* **Realistic**: Take in to consideration any learning, mentoring that has to take place or habits that have to be broken first before you set your employee’s goal. If you are asking your employee to do something better, make sure they have the basics down first. Assess them, determine any gaps, and set your goals according to their skills and abilities.
* **Timely**: Always set a time limit or timeframe. Do not allow your employee’s goal to wander aimlessly. Schedule follow up meetings and keep them. Your employee looks forward to these meetings especially when they are moving towards the goal. Do not set too much time between intervals. This may send the message to your employee that they have time to make the adjustment. You want to set short specific timeframes.

SMART goals are easy to do, but require a commitment on your part to use the process consistently. Now that you have an idea how to develop your goal, we are going to see why understanding the reality is essential to the coaching process.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | The participant will identify the components of making a SMART goal. |
| **Lesson Summary** | SMART goals stand for the following process:   * Specific * Measurable * Attainable * Realistic * Timely |
| **Materials Required** | * [Worksheet 7: SMART Goal Setting](#_Worksheet_7) |
| **Planning Checklist** | * Print enough sheets for all participants. |
| **Recommended Activity** | * Go over each area of the SMART worksheet * Instruct each participant to write the name of the employee from the last activity on the SMART worksheet * Have them fill out the worksheet * Encourage questions. |
| **Delivery Tips** | Be prepared and understand how to write SMART goals before facilitating the workshop. |

## Practical Illustration

Cory worked in the customer service department of the company he worked for. He had no defined goals except to help the customers with whatever problems they may have. Alex, the manager, approached Cory and asked for his satisfaction rating and other statistics relating to his work performance. While Cory worked hard, he had not been made aware that he needed to keep up with those statistics. Alex explained the process and set forth the goals that Cory would be expected to both reach and track. After that, Cory always had his performance reports ready and knew he was doing well.

## Module Three: Review Questions

1. The key step of the GROW model is:
   1. Setting the goal
   2. Reality check
   3. Options developed
   4. Wrap it up with a plan

The first step of the **GROW** model is the key step in the process. Setting the goal gives you and your employee direction and purpose.

1. Which of the following IS NOT one of the benefits of setting goals?
   1. Coaching time is more efficient once goals are discussed upfront
   2. The coaching session is direct and avoids meandering
   3. The employees work faster
   4. Your message will come across clear, instilling confidence in your employees

Setting goals are not intended to get your employee to work faster, but work better.

1. Which of the following IS NOT among the common questions that help in setting goals?
   1. Where are you in relation to those goals?
   2. How will you know you reached that goal?
   3. What do you think is keeping you from reaching this goal?
   4. How much will the reaching of this goal cost?

Cost is not usually a factor in establishing SMART goals.

1. Which of the following statements IS NOT true?
   1. Determining what roadblocks are preventing employees from reaching their goals will provide insight into their personal circumstances
   2. You will solve all the employee’s problems through the questions
   3. Allowing your employee to speak more enables you to gather more information
   4. You should let your employees know that you are interested more in their personal goals as a way to help them reach goals at work

You will not solve employees’ problems by asking questions.

1. In SMART technique, letter S refers to:
   1. Smart
   2. Strong
   3. Specific
   4. Steady

**Specific**: What needs to be done? The goal must be clear. It cannot be a general statement like be better at sales or be more organized. Use action verbs like increase sales or use a calendar.

1. In SMART technique, letter T refers to:
   1. Timely
   2. Talkative
   3. Tolerant
   4. Trending

**Timely**: Always set a time limit or timeframe. Do not allow your employee’s goal to wander aimlessly.

1. Without a \_\_\_\_, your chances of successfully coaching your employee to better performance are low.
   1. A follow-up meeting
   2. Goal
   3. A and B
   4. Neither A nor B

Without a goal, your chances of successfully coaching your employee to better performance are low.

1. Which of the following is a benefit to establishing goals upfront?
   1. You and your employee have a better chance of starting in the right direction together.
   2. Coaching time is more efficient once goals are discussed upfront.
   3. The coaching session is direct and avoids meandering.
   4. All of the above

All of the above are benefits to establishing goals upfront.

1. When coaching, it is a temptation for you to \_\_\_\_\_\_\_\_\_.
   1. Talk
   2. Listen
   3. A and B
   4. Neither A nor B

When coaching, it is a temptation for you to talk more because we have plenty to say.

1. The A in SMART goals is:
   1. Approachable
   2. Attainable
   3. Action
   4. Application

Attainable: Make sure the goal is not too much at one time to complete.

# Module Four: Understanding the Realities

*Reality is that which, when you stop believing in it, doesn’t go away.*

***Philip K. Dick***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OVV8IZ9R\MC900090432[1].wmfIn the last module, you plotted a marker in the horizon as a beacon, guiding your employee to a specific, measurable, attainable, realistic, and timely goal. This is a great start, but there is also a need to know where your journey began. Placing a marker at the starting point of your employee’s coaching journey enables both you and your employee to determine and measure progress. The goal in the offing may never seem to get any closer, because you have no point of reference to gauge your progress.

In this module, you will learn how to place that stake in the ground, marking the beginning of the coaching journey. Examining the current **realities** is the second component or the “R” of the GROW model. Let us delve into this concept to learn more about it.

## Getting a Picture of Where You Are

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900383224[1].wmfFraming the reality of the situation for your employee is an important step to accepting the coaching process. It is easier for you to outline your employee’s performance problem, but this does not create the most receptive environment. In order to gain acceptance of the problem, it is best to let the employees come to the realization themselves. Neglecting to do this could result in a non-responsive employee. They may feel apprehensive or defensive and shut down. They may go along with your coaching, but their attitude is that of just getting the coaching session over with in the least amount of time. Involving your employee is easy if you are willing to ask questions, listen, and guide your employee to where they are in their performance. Here are four simple questions you can ask:

* What is happening now?
* How often is this happening?
* When does it happen?
* What is the affect?

These questions help you to guide your employee to a place where they can see their performance affect the organization. When they realize the impact on their own, more buy-in is created. In addition, more information may be obtained about why your employee is not performing at the level they should be.

The realization of the problem marks the starting point. It also serves as a marker on performance. For instance, an employee may discover that they are not reaching production goals because they are taking extra time doing something incorrectly. By understanding this, you are able to refer to this issue when improvements occur.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify the benefits of having employees identify themselves where they are in terms of their performance. |
| **Lesson Summary** | Through a group discussion, participants will discover that the employee will see the effect of their performance not only to themselves, but also to the entire organization. |
| **Materials Required** | * Flip chart * Markers * [Worksheet 8: Getting a picture](#_Worksheet_8) with following questions:   + What is happening now?   + How often is this happening?   + When does it happen?   + What is the affect? |
| **Planning Checklist** | * Print enough worksheets for all participants. |
| **Recommended Activity** | * Distribute worksheets to all participants * Have table teams elect a leader * Have the team discuss a time when they received coaching and were told of the problem without their input. What reactions did you have? * Instruct table leader to jot down group answers to share with the rest of the class. * Write down responses from table leaders on flip chart. * Debrief by giving benefits of allowing employee self-identify their current performance issue. |
| **Delivery Tips** | Go around the room to each team in round-robin format, allowing all tables to share before answers begin to repeat. |

## Identifying Obstacles

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900389034[1].wmfWhen coaching, obstacles may arise; you should be prepared so each is handled with efficiency. The last thing you want is to be faced with an obstacle you cannot address because you are not prepared to handle the problem with a consistent response.

Using the IRA steps to obstacle identification and removal, is vital to the coaching process. Here is the breakdown of the process.

* **Identify the obstacle**: Have a frank discussion with your employee and determine what is blocking their performance. Waiting for them to give you the information voluntarily will probably not happen.
* **Root out the cause**: Many times, underlying emotions or problems may be the cause of the obstacles. Ask probing questions and jot down answers. You might realize they have a fear that must be addressed.
* **Antidote given**: A remedy to the situation is needed in order to get past this obstacle. Brainstorm with your employee ways to remove the obstacles. In some cases, you may have to try several different antidotes. Be patient if the cause is genuine.

No matter what the perceived obstacles are, do not let it stifle your coaching objective. Rarely, you may encounter an employee that throws obstacles constantly your way in an effort to derail you. Identify this and address it with that employee, documenting every conversation.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | The participants will understand the steps to identifying obstacles and removing them. |
| **Lesson Summary** | Participants will use the IRA steps to identify and remove them. IRA stands for:   * **Identify** obstacle * **Root out** cause   + Sample causes: fear, denial, lack of resources, complacency and entrenched culture * **Antidote** given   + Sample antidote: fear/knowledge; denial/acknowledge; lack of resources/give information, procedures; complacency/re-focus; entrenched culture/realign to vision |
| **Materials Required** | * [Worksheet 9: IRA](#_Worksheet_9) * IRA worksheet |
| **Planning Checklist** | * Print enough worksheets for all participants. |
| **Recommended Activity** | * Distribute IRA worksheets to all participants * Have participants work with their table groups * Allow five to seven minutes for them to complete * Go over the answers with the class * Have groups come up with their own obstacles, causes and antidotes * Go around room and have teams share their answers * Once complete ask how did the IRA process helped them. |
| **Delivery Tips** | Stress the fact that obstacles come in various forms with various causes. They must be keen to their employee’s situation. |

## Exploring the Past

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900354126[1].wmfExploring your employees past performance and development is a great way to develop the reality of today’s performance. Of course, you want to avoid belaboring a past mistake to the point where it makes the session ineffective. On the other hand, focusing on previous achievements helps to encourage your employee.

Here are some things to focus from the past:

* Goals that were met
* Great behaviors
* Great attitudes
* Problems solved

Using the past helps to recap where your employee is at today. It is like telling a story but the end has not yet been determined. Use this time to speak positively to your employee. Avoid being negative or emphasizing the consequences to failure. This will leave an impression on your employee that could hinder their success.

Setting a positive environment opens the door for the next part of the GROW model. Developing options is an essential step both you and your employee must take in order to continue toward meeting your development goals.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | The participants will understand the benefits of exploring the past to determine future steps. |
| **Lesson Summary** | A brief lecture on exploring the employee’s past will help the participants understand the benefits of reviewing past performance and behavior in shaping the future of their employee. |
| **Materials Required** | Flip chart, markers |
| **Planning Checklist** |  |
| **Recommended Activity** | Discuss as a large group the reasoning behind exploring the past. |
| **Stories to Share** | Of course, we do learn from history, but it is how we apply the learning that matters. I remember in Arthur Koestler’s The Act of Creation (1964) how he talked about creativity being like being faced with a canyon you wish to cross. Your first step it to find a bridge. You might find a bridge that nearly fits but then some extra effort is required to completely span the gap. These bridges are our patterns, which we develop through experience or by hearing stories about other people’s adventures. While we are good at recalling past patterns we must remain mindful of the need to reshape these patterns according to the context and needs of the issue at hand.  Anecdote by Dave Snowden |

## Practical Illustration

Gary worked as a receptionist. He had been told that he needed improvement by his supervisor Jenna, but not on what he needed to improve specifically. After a while, he was assigned a coach named Dan. Dan helped Gary map out what his current situation was, and then they set goals for improvement in the areas Gary might be lacking in. After a while, Gary felt a little better about his work, though he wasn't sure if he was really improving. Dan came back to assess Gary after the goals were set. When he compared the results to his original assessment, Gary was happy to find that he had improved as he had thought, and he had Dan to thank for that reassurance.

## Module Four: Review Questions

1. Placing a marker at the starting point of your employee’s coaching journey is useful because:
   1. It enables you to determine and measure progress
   2. It enables your employee to determine and measure progress
   3. It enables both you and your employee to determine and measure progress
   4. It is just a formality

Placing a marker at the starting point of your employee’s coaching journey enables both you and your employee to determine and measure progress.

1. Which of the following questions is not useful for getting the picture of where you are?
   1. How often is this happening?
   2. When does it happen?
   3. What is the affect?
   4. Who is guilty for the problems?

Asking who is guilty, or responsible for the problems, is not a useful question.

1. What is the acronym for three steps process for identifying the obstacles?
   1. IPA
   2. IRA
   3. IDA
   4. INA

The acronym is IRA.

1. Letter A in the acronym of three steps process for identifying the obstacles refers to:
   1. Advantages
   2. Accidents
   3. Antidote given
   4. Avoiding problems

A=Antidote given

1. Why is exploring your employee’s past performance and development important?
   1. You need to know all the ‘dirty laundry’
   2. It helps you develop the reality of today’s performance
   3. It can confirm your authority
   4. It is not so important – it is optional

Exploring your employee’s past performance and development is important because It helps you develop the reality of today’s performance.

1. Which of the following IS NOT among the primary things you should know about your employee’s past?
   1. Great behaviors
   2. Problems solved
   3. Problems caused
   4. Great attitudes

Focus on the positive

1. Placing a marker at the starting point of your employee’s coaching journey helps \_\_\_\_\_\_\_\_\_ progress.
   1. Determine
   2. Measure
   3. A and B
   4. Neither A nor B

Placing a marker at the starting point of your employee’s coaching journey enables both you and your employee to determine and measure progress.

1. In order to gain acceptance of the problem, it is best to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
   1. Explain to the employee what the problem is.
   2. Let them come to their own realization of the problem.
   3. Have a peer explain the problem to them.
   4. None of the above

In order to gain acceptance of the problem, it is best to let the employees come to the realization themselves.

1. What is the result when employees realize the impact on their own?
   1. More buy-in is created
   2. They will feel embarrassed
   3. Their chances of success are reduced
   4. None of the above

When they realize the impact on their own, more buy-in is created.

1. Using \_\_\_\_\_\_\_ helps to recap where your employee is at today.
   1. Goals
   2. The past
   3. Schedules
   4. Peer evaluations

Using the past helps to recap where your employee is at today.

# Module Five: Developing Options

*When a person acts without knowledge of what he thinks, feels, needs, or wants, he does not yet have the option of choosing to act differently.*

***Clarke Moustakas***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900055284[1].wmfThis module discusses how to explore **options** that will enable your employee to move towards the goal that was set before them. This is the next component or the “O” in the GROW model. This is the pivotal step in the coaching process. If done correctly, you will engage your employee and create a desire for them to improve. If done incorrectly, your employee will disengage and they probably will fail again. It is the coach’s job to create this participative environment. Let us look and see how.

## Identifying Paths

Many times, we feel that we have to outline the specific actions the employee has to take, in order to reach the stated goal. While this may make you feel better, the likely hood of this action becoming meaningful to your employee is close to nil. Let us quickly review what we have done so far. You established what the goal is. There is usually very little wiggle room when it comes to a performance goal. It is the plain, unchangeable business reality. Next, we established the current state of affairs with respect to your employee’s performance. This historical and factual reality is also unchangeable.

Now, let us take it from the employee’s perspective. How in control do they feel? Would they shut down if we, as their coach, solely determine the action steps they are going to take? They might. It is imperative to keep the employee engaged. If not, the rest of the coaching session is just a one-way discussion, leaving your employee powerless in their own development.

When you allow your employee to participate in the development of their options, you get B.I.G. results. B.I.G. stands for the following:

* **Buy-in** by your employee, because the options developed were a collaborative effort
* **Innovation**, because more creativity is possible when two work at it
* **Growth**, because the options developed will have more meaning and lasting commitment

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand the benefits of allowing their employee participate in developing options. |
| **Lesson Summary** | Sharing the development of options will result in B.I.G. results. B.I.G. results stands for the following benefits:   * Buy-in by your employee * Innovation when two participate in developing options * Growth |
| **Materials Required** | * B.I.G. developing options template * [Worksheet 11: Coaching scenario](#_Worksheet_11) |
| **Planning Checklist** | * Print enough templates for all participants. |
| **Recommended Activity** | * [Worksheet 10: B.I.G. Developing Options](#_Worksheet_10) template and coaching scenario * Have each participant brainstorm options * Advise participants not to complete the APAC portion of template * Give 2-3 minutes * Once done, have participants share their options with their tablemates * Instruct participants to write down new options shared by each tablemate that they did not have on their list * **Ask:** What are some benefits to sharing you options (Target answer: more options, new and different options) |
| **Delivery Tips** | Go around the room and have the participants share several of the options they developed for the coaching scenario, complementing them on their ability to draft options. |

## Choosing Your Final Approach

Deciding on which option to implement could be frustrating. The best thing to do is to implement a consistent method to determining the best possible option. The APAC section of the B.I.G. template is designed to help you come to a quick decision on which option to implement. Here is how it works:

After you have brainstormed your options with your employee, assess the pros of each option. Determine the benefits and possible rewards for selecting that option. Write those benefits in the template. Next, assess the cons for each option. Here are some things to consider:

* Resources needed
* Cost
* Time
* Return on investment
* Disruption of the business

All of these factors could rule out an option. Once you identify the cons, place those in the corresponding area on the template. Next, determine the top five options that are feasible to implement. Use a rating scale from 1-5 and place that in the rating column. Now, you are ready to rate the relevancy of the options identified as feasible. Rate the relevancy of the options to the goal. Here are some things to consider when rating this category:

* Does this option build new supporting skills?
* Does this option meet the time requirement of the goal?
* Is this option measurable?

Once you determine the relevancy, you are able to multiply the feasibility rating with the relevancy rating. The highest number is possibly your best option. Remember to gain consensus from your employee on this option.

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| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will use an objective approach to determine which option to use for developing their employee. |
| **Lesson Summary** | Completing the APAC portion of the B.I.G. template will help determine which option to use. APAC stands for the following steps:   * Assess the Pros for each option * Assess the Cons for each option |
| **Materials Required** | * [Worksheet 10: B.I.G.](#_Worksheet_10) (already distributed in last activity) * APAC definition written on board or flipchart |
| **Planning Checklist** |  |
| **Recommended Activity** | * Instruct participants to define the pros and cons for each option they have listed on the template * Next, have them rate the top five options for feasibility, using a scale of 1-5, with five being the best rating, and have them place that rating in the Rate column. * Next, have them rate the top five options identified in the last step for relevance to the development goal using a scale of 1-5 with five being the most relevant, and have them place it in the Relevancy column. * Have the participants multiply the numbers in each both columns for an overall rating. * The option with the highest score is possibly the best option |
| **Delivery Tips** | Guide the participants on how to use this tool. In addition, remind them this is a helpful tool for determining which option to select. They should gain consensus from their employee before making a final decision. |

## Structuring a Plan

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900363650[1].wmfSince you have your employee’s attention, it is best to begin the planning process. Structuring a plan as soon as possible sends the message to your employee that you mean business when it comes to implementing the option. For example: your SMART goal may be to increase the sales attempt rate from five percent to seven in 30 days. Next, you and your employee may have agreed that focusing on asking open-ended questions during a sales call is the method they choose to achieve this goal. Be definitive, and ask: When are they going to start asking those questions? How many are they going to ask? These are action items you want document in a preliminary plan.

The **3T** questioning technique helps you document three major milestones. You ask, “What are you going to do:

* Tomorrow?
* Two weeks from today?
* Thirty days from today?

You may need to guide your employee when answering the first question. Remember, the more time you let pass from the time you coach them, to the time you implement your first action step, the more information could be lost. Here is an example of how the earlier scenario could be developed:

Coach: “You said you wanted to ask more open-ended questions to help you attempt better sales. Great, what steps are you going to take tomorrow to begin that process? "

Employee: “I can try asking an open ended question on every few calls.”

Coach: “Do you think you can ask a question on every third call?”

Employee: “Okay, I will try to ask on every third call.”

Coach: “Let’s look ahead two weeks from now. Do you think you can increase the frequency to every other call?”

Employee: “That sounds fair.”

Coach: “Great, now, let’s shoot to ask questions on every call 30 days from now. What do you think?”

Employee: “I believe I can do this, or at least get really close.”

Coach: “Let’s write this down on paper and put a final plan together.”

Once you get to this point, you are ready to begin drafting your final plan. Let’s see what this involves.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will create a quick plan with the chosen option. |
| **Lesson Summary** | Use the 3-T questioning technique to help structure a preliminary plan. Ask the employee, “What they are going to do…   * Tomorrow? * Two weeks from today? * Thirty days from today? |
| **Materials Required** | * [Worksheet 12: 3T form](#_Worksheet_11) * Option from previous lesson activity |
| **Planning Checklist** | * Prepare enough forms for all participants * Be familiar with the 3T questioning technique |
| **Recommended Activity** | * In their groups, have the team answer the three questions * Have groups select a table leader * Distribute worksheet * Allow 2-3 minutes, then have the table leaders share their three responses with the class * Ask the participants how they felt using these questions in structuring a plan. |
| **Delivery Tips** | Recommended approaches for delivering the lesson. |

## Practical Illustration

Darren was assigned to help Perry by coaching him. Perry didn't have a big enough budget for marketing. Darren decided it would be best to hear Perry and his ideas on options to solving the issue. After they both collaborated and pulled together some viable options, they had to make a decision. They compared the costs in both time and resources of each option, while also taking the potential return on the investments into consideration. They eventually came to the decision to focus the marketing strategy on a central medium rather than spread it out more thinly. The marketing venture was a success, and it was because of the collaboration of the two of them.

## Module Five: Review Questions

1. Sharing the development of options will result in:
   1. B.A.G. results
   2. B.E.G. results
   3. B.I.G results
   4. B.U.G. results

Sharing the development of options will result in B.I.G results

1. In the acronym of the results of sharing the development of options, letter G refers to:
   1. Gaining
   2. Growth
   3. General
   4. Goals

G= Growth

1. Which of the following IS NOT among the things you should consider when choosing the final approach?
   1. Cost
   2. Time
   3. How challenging it is
   4. Disruption of the business

Resources needed – Cost – Time - Return on investment - Disruption of the business are what you should consider.

1. Which of the following IS NOT something you should consider when you are rating the relevancy of the options to the goal?
   1. Does this option require more employees?
   2. Does this option build new supporting skills?
   3. Is this option measurable?
   4. Does this option meet the time requirement of the goal?

Things to consider when you are rating the relevancy of the options to the goal: Does this option build new supporting skills? Does this option meet the time requirement of the goal? Is this option measurable?

1. The 3Tasking technique DOES NOT refer to what are you going to do:
   1. Tomorrow
   2. In two weeks
   3. In thirty days
   4. In three months

The 3Tasking technique refers to Tomorrow, In two weeks, In thirty days.

1. When it comes to the first question of the 3T technique, you:
   1. Are going to get the answer easily
   2. May need to guide your employee when answering it
   3. May need to force the employee to come up with something
   4. None of the above

You may need to guide your employee when answering the first question.

1. The “O” in the GROW model is the \_\_\_\_\_\_step in the coaching process.
   1. Easiest
   2. Pivotal
   3. Final
   4. None of the above

The “O” in the GROW model is the pivotal step in the coaching process.

1. It is imperative to keep the employee \_\_\_\_\_\_\_\_.
   1. Entertained
   2. Excited
   3. Engaged
   4. Employed

It is imperative to keep the employee engaged. If not, the rest of the coaching session is just a one-way discussion, leaving your employee powerless in their own development.

1. Once you determine the relevancy, you are able to multiply the feasibility rating with the \_\_\_\_\_\_\_\_\_ rating.
   1. Relative
   2. Relatable
   3. Reference
   4. Relevancy

Once you determine the relevancy, you are able to multiply the feasibility rating with the relevancy rating.

1. The more time you let pass from the time you coach them, to the time you implement your first action step, the more\_\_\_\_\_\_\_\_\_\_\_\_ could be lost.
   1. Information
   2. Time
   3. A and B
   4. Neither A nor B

Remember, the more time you let pass from the time you coach them, to the time you implement your first action step, the more information could be lost.

# Module Six: Wrapping it All Up

*A good plan today is better than a perfect plan tomorrow.*

***Chinese Proverb***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900055563[1].wmfIn the last module, your goal was to get your employee participating in the coaching process by identifying actions steps together. It is time now to solidify what has been said and established as actions steps, or simply stated—wrapping it all up.

In this module, you are going to learn how to finalize your employee’s plan in a way that motivates them to take action immediately. **Wrapping** up the coaching session is the final component or the “W” in the GROW model to coaching. This step is crucial, because it should set things in motion quickly, which is your goal. Let us see how:

## Creating the Final Plan

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900363638[1].wmfWhen creating a development plan, there must be consistent steps outlined, allowing your employee the opportunity to learn, apply measure, and assess their development. The LAMA process is designed to approach the planning activity in a consistent and efficient manner.

Each component of the LAMA process is time sensitive and is anchored by your overall SMART goal, meaning the entire process should be complete by the goal day you set. Here is the breakdown of LAMA and a description of each of the components:

* **Learn**: some form of learning should take place. It could be a variety of activities. Mentoring with a peer, reading a book, or taking a course, are some examples of learning opportunities you may implement.
* **Apply**: implement what was learned soon after learning is completed.
* **Measure**: agree on a method of measuring when and how the new learning is used on the job. You can perform observations, or have your employee track it on a worksheet you developed. The idea is to monitor the use of the new knowledge.
* **Assess:** review the impact of the new skill on the performance metric being improved. Any success should be attributed to the new skill, and encouraged.

As mentioned earlier, each component must have a start and an end date. The assessment date should correspond to the SMART goal date. If your SMART goal timeframe is greater than 30 days, you should plan more assessment dates and coach according to the performance results.

Since you now have a basic idea how to create that final plan, let’s look at how to determine the first step.

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| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will understand how to create a final plan. |
| **Lesson Summary** | Use the LAMA model to help build a detailed development plan. LAMA stand for the following steps:   * Learn the new skill * Apply the new skill * Measure the performance * Assess the results |
| **Materials Required** | * [Worksheet 13: LAMA](#_Worksheet_13) * Flip chart * Markers |
| **Planning Checklist** | * Prepare enough worksheets for the participants * Have enough flip chart paper and markers for all the table groups * Be familiar with the LAMA process |
| **Recommended Activity** | * In groups, have the team develop a LAMA plan * Have the team write their plan on a piece of flip chart paper * Allow 3-5 minutes, then go around the room and have teams share their ideas as a group |
| **Delivery Tips** | Remind the groups to model the structure of the flip chart example to that of the LAMA worksheet for consistency. |

## Identifying the First Step

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900291950[1].wmfThe first step to any development activity is to learn. Allowing the employees to learn something new is essential to their overall development. There are many benefits to making learning a deliberate practice in the coaching process.

Here is a summary of benefits:

* Employee feels valued because of the investment you are making in them
* You demonstrate that you care, which helps to foster a better working relationship
* You offer the chance for a role model to become a mentor to your employee
* New skills learned could be shared with other employees

Now you understand some of the benefits to learning. Let’s look at ways you are able to motivate your employee.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand the benefits of allowing learning to be the first step to development. |
| **Lesson Summary** | Facilitate a discussion on the benefits of making learning the first step. |
| **Materials Required** | * [Worksheet 14: Learning resource sheet](#_Worksheet_14) * Power point/flip chart describing benefits |
| **Planning Checklist** | * Have power point tested and ready before facilitation. * Prepare description on flip chart * Have enough sheets ready |
| **Recommended Activity** | * Present slides * Go over benefits * Encourage questions * Distribute resource sheet |
| **Delivery Tips** | Do not take too long going over presentation. |

## Getting Motivated

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900437000[1].wmfMotivating your employee is an essential part of coaching. Many times, motivating by money alone is not enough. Employees prefer to have a great working environment and a good relationship with their manager. It is the manager’s job to create this environment. Here is a helpful way to create the supportive and motivating environment your employees need to thrive.

The process is called the five B’s. This process requires you to re-think the way you manage. If you find yourself challenged by this topic, seek out additional resources that will help you develop the skills and behaviors necessary to foster a motivating atmosphere.

The five B’s are the following:

* **Be consistent** in your coaching. Coach all of your employees. Do not reserve coaching for only your “problem “employees.
* **Be respectful** toward your employees. Being a manager does not give you the right to insult or berate your employees.
* **Be caring** and watch your employees’ behavior for signs of personal issues. The goal is to guide them when they are experiencing problems both in and outside of work. Of course, you are not going to get personally involved, but you want to lend an empathetic ear and guide them to resources that my help them.
* **Be flexible** and find ways to reward your employees with non-monetary items. Perhaps some downtime away from their desk doing something else, or cross training, is a possibility.
* **Be a cheerleader** and celebrate even the smallest of successes. Give recognition the way your employees prefer. Some may like public recognition while others prefer a low-key approach. Find out what your employees prefer and use it strategically.

Taking the time to motivate your employees is a worthwhile investment. Make sure you plan it and implement it without fail or else your coaching efforts will be in vain. Next, let’s look at the importance of trust in the coaching environment.

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| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify techniques to motivating their employees. |
| **Lesson Summary** | Use the five B’s to help keep your employees motivated. The five B’s are:   * Be consistent * Be respectful * Be caring * Be flexible * Be a cheerleader |
| **Materials Required** | * [Worksheet 15: Get them motivated](#_Worksheet_15) * Flip chart * Markers |
| **Planning Checklist** | Make sure enough materials are available for all groups. |
| **Recommended Activity** | * Distribute worksheet * In their groups, have them brainstorm things they can do under each of the five B’s. * Allow 3-5 minutes and then go around room and have them share |
| **Delivery Tips** | If you have five groups, assign each group a category and have them brainstorm only that category. |

## Practical Illustration

Aaron was an office worker for a paper sales company. He had been nearly stagnant until his coach Windy came along. After the identification of the problem and a collaborated plan of action, Aaron was nearly ready. Windy first made sure he had learned to better organize, and then she finalized the plan with a call to action. Aaron had specific goals and deadlines he needed to adhere to, so he began working to meet those goals immediately. After a follow up assessment, Windy determined that Aaron had shown substantial improvement, and made sure to congratulate him.

## Module Six: Review Questions

1. What is the acronym of a process designed to approach the planning activity in a consistent and efficient manner?
   1. LAMA
   2. LANA
   3. LARA
   4. LADA

LAMA is the acronym used to describe the planning activity.

1. In the acronym of a process designed to approach the planning activity, the two A’s refer to:
   1. Applying and advising
   2. Applying and assessing
   3. Advantages and assess
   4. Advantages and assessing

Applying and assessing

1. What is the first step to any developing activity?
   1. Practicing
   2. Working
   3. Learning
   4. Each activity has its own first step

The first step to any development activity is to learn.

1. Which of the following IS NOT one of the mentioned benefits of learning?
   1. You give a chance for a role model to become a mentor to your employee
   2. New skills learned could be shared with other employees
   3. Employee feels valued with the investment you are making in them
   4. You establish a whole new level of your own authority

The benefits mentioned: Employee feels valued because of the investment you are making in them - You demonstrate that you care, which helps to foster a better working relationship - You offer the chance for a role model to become a mentor to your employee - New skills learned could be shared with other employees.

1. Which of the following statements is true?
   1. Motivating by money is usually enough
   2. Many times, motivating by money alone is not enough
   3. Motivating by money is always enough
   4. Motivating by money is never enough

Many times, motivating by money alone is not enough. Employees prefer to have a great working environment and a good relationship with their manager.

1. Which of the following IS NOT one of the five B’s for keeping the employees motivated?
   1. Be a cheerleader
   2. Be respectful
   3. Be strict
   4. Be flexible

The Bs are: Be caring, be consistent, be a cheerleader, be flexible, respectful

1. The M in LAMA stands for:
   1. Mastering
   2. Measuring
   3. Mock-up
   4. Mindfulness

**Measure**: agree on a method of measuring when and how the new learning is used on the job. You can perform observations, or have your employee track it on a worksheet you developed. The idea is to monitor the use of the new knowledge.

1. The goal in caring for your employees is to:
   1. Cheer them on
   2. Respect them
   3. Guide them
   4. Be flexible

The goal is to guide them when they are experiencing problems both in and outside of work.

1. The LAMA assessment date should correspond to the \_\_\_\_\_\_\_.
   1. SMART goal
   2. Last day of work
   3. End of the pay period
   4. None of the above

The assessment date should correspond to the SMART goal date.

1. Offering your employee time away from the desk is considered being:
   1. A cheerleader
   2. Respectful
   3. Strict
   4. Flexible

**Be flexible** and find ways to reward you employees with non-monetary items. Perhaps some downtime away from their desk doing something else, or cross training, is a possibility.

# Module Seven: The Importance of Trust

*Without trust, words become the hollow sound of a wooden gong. With trust, words become life itself.*

***Anonymous***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900367808[1].wmfIn your coaching session with your employees, you will discover many times, things about your employee that are personal and sensitive in nature. This is normal and demonstrates your employee’s level of trust in you. As their coach, establishing and maintaining trust is the most essential ingredient to the entire process. If your employee determines that your purpose of improving their performance is to further your career, then they will not trust you. Without trust, whatever you say and do will be subject to skepticism.

This module discusses the meaning of trust, and its relationship to coaching and building trust. Building trust must be a sincere desire. It requires an investment in time and emotion. Anything less will not foster a trusting relationship between you and your employee. First, let us begin by defining what trust is.

## What is Trust?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900332500[1].wmfIn the next couple of lessons, we are going to discuss trust. Coaching should be a time when you and your employee can discuss things openly. Having a trusting relationship with your employees is essential to the coaching process. Without trust, you will seldom get to the root cause of issues that could be hindering an employee’s performance.

Trust is built over time and is accomplished through your actions. Trust, in the realm of coaching, could be defined as the ability to instill confidence, and reliance by being fair, truthful, honorable, and competent in what you do as a manager.

Let’s look at how trust works in coaching.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will be able to define the meaning of trust. |
| **Lesson Summary** | Trust is the ability to instill confidence and reliance in someone by being fair, truthful, honorable, and competent in what you do as a manager. |
| **Materials Required** | * Flip chart * Markers * 3X5 Index cards * Power point slide or flip chart with the meaning of trust |
| **Planning Checklist** | * Have pieces of flip chart paper ready to distribute to the groups * Have enough index cards on the table for all participants |
| **Recommended Activity** | * In their groups, have each participant think of a manager they trust * Have the participants write down on the index card the attributes or behaviors that makes them trustworthy * Encourage the participants to share their notes with the rest their tablemates * Have a table leader collect an attribute from each participant at the table * Ask table leaders share a couple of attributes and go around the room * Once done, display the slide or flip chart with the meaning of trust * Encourage questions |
| **Delivery Tips** | Make sure the table leader is chosen at the beginning of the activity so they can have enough time to collect responses from their tablemate to share with the rest of the class. |

## Trust and Coaching

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900090662[1].wmfIn order for you to be able to inspire your employees to perform better, they have to trust you. Your coaching session is an opportunity to demonstrate that employees can trust you. Effective coaching is done in a trusting environment; you use the coaching session as a tool for building up employees.

Avoid using your coach session as a venue to deliver reprimands, sanctions, bad news, etc. This is not the place for that kind of information. Coaching should be a purposeful event that happens regularly and is void of negative information. This is not to say you cannot discuss performance issues. It just has to be presented in a way that speaks of development rather than of punishment.

When coaching, we should avoid being a DOPE, or

* **Degrading** your employees
  + Using negative words like stupid, lazy, slacker, etc.
* **Ostracizing** your employee
  + Using coaching sessions only as a means of disciplinary action
* **Punishing** your employee
  + Using sessions to deliver sanctions or firing them
* **Evaluating** your employee
  + Telling employees that they are the worst performer,
  + Why can’t they be like the other good employees, etc.

Make coaching a haven for encouragement and development and not a place for stress and discouragement. Without trust, you will not be able to coach well.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will understand how coaching and trust work together. |
| **Lesson Summary** | Creating a negative experience in your coaching sessions will hinder your ability to build trust. While coaching your employee, do not be a DOPE.  Do not:   * Degrade your employee * Ostracize them * Punish them * Evaluate them |
| **Materials Required** | * Flip chart * Power point or flip chart with DOPE defined * Marker |
| **Planning Checklist** | * Make sure flip chart is removed of used sheets * Have power point or flip chart ready with definition |
| **Recommended Activity** | * Ask the participants, “What are some ways you can make the coaching experience negative?” * Go around the room and collect answers and write the on flip chart * Stop when you have several items listed on the flip chart * Tell participants that in order to foster a trusting relationship during the coaching process we must avoid being a DOPE * Display the slide or flip chart with definition * Encourage questions |
| **Stories to Share** | There was once a manager I knew that only “coached” people when it was a serious issue. The word “coaching” meant you were in trouble. Employees feared their manager, because they never knew if they were going to be called in for a “coaching” session, which was always a negative event. |

## C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900055273[1].wmfBuilding Trust

Building trust takes practice and dedication to being sensitive to your employee’s needs. Here are eight steps to building trust with your employees in and out of the coaching session:

1. Maintain positive body language
2. Listen to them intently and speak less
3. Always respect your employees
4. Keep things confidential
5. Keep your promises
6. Be honest and transparent
7. Be confident
8. Tell them you believe in them

Next, let’s look at ways to provide feedback in a positive, yet serious manner.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will define the steps to building trust with their employees. |
| **Lesson Summary** | There are 8 steps to building trust with your employees. |
| **Materials Required** | * [Worksheet 16: 8 Steps to Building Trust](#_Worksheet_16) |
| **Planning Checklist** | * Have enough worksheets for all participants * Be familiar with the 8-Step process |
| **Recommended Activity** | * Have table teams discuss ways they can build trust * After 3-4 minutes, encourage participants to share randomly * Distribute worksheet and review the process * Encourage questions |
| **Delivery Tips** | Walk around the room when brainstorming to lend guidance when necessary |

## Practical Illustration

Ringo was an active sales coach for the company, and knew how to gain and keep the trust of other employees. He knew that without it, the entire coaching process would be compromised. He never spoke harshly or negatively to the employee he was coaching, and was always completely honest with them. He found that the more he respected and trusted the employee, the more the employee respected and trusted him. This genuine attitude helped make Ringo a more effective and helpful coach to the employees and made them better employees as well.

## Module Seven: Review Questions

1. Building trust must be:
   1. Established at least by force
   2. A sincere desire in you
   3. At least ostensibly if not sincere
   4. None of the above

Building trust must be a sincere desire. It requires an investment in time and emotion. Anything less will not foster a trusting relationship between you and your employee.

1. Trust is accomplished by:
   1. Your thoughts
   2. Following certain rules
   3. Your actions
   4. Force

Trust is built over time and is accomplished through your actions.

1. The acronym of things you should avoid when coaching is:
   1. DOME
   2. DORE
   3. DODE
   4. DOPE

DOPE

1. In the acronym of things you should when coaching, letter D stands for:
   1. Defending
   2. Degrading
   3. Dictating
   4. Dismissing

D=Degrading

1. Which of the following statements IS NOT true?
   1. There are nine easy steps for building trust
   2. Building trust takes practice
   3. You need to be sensitive to employee’s needs to build trust
   4. All the statements are true

There are eight steps to building trust with your employees in and out of the coaching session.

1. Which of the following IS NOT one of the easy steps for building trust?
   1. Be confident
   2. Maintain positive body language
   3. Keep things confidential
   4. Taking the authoritative attitude

The 8 steps mentioned are: Maintain positive body language. Listen to them intently and speak less. Always respect your employees. Keep things confidential. Keep your promises. Be honest and transparent. Be confident. Tell them you believe in them.

1. Coaching should be a time when you and your employee \_\_\_\_\_\_\_\_\_\_\_\_.
   1. Leave the office
   2. Maintain positive body language
   3. Discuss things openly
   4. None of the above

Coaching should be a time when you and your employee can discuss things openly.

1. Trust is defined as:
   1. The ability to instill confidence
   2. The ability to instill reliance
   3. A and B
   4. Neither A nor B

Trust, in the realm of coaching, could be defined as the ability to instill confidence, and reliance by being fair, truthful, honorable, and competent in what you do as a manager.

1. Avoid using your coach session as a venue to deliver \_\_\_\_\_\_\_\_\_\_.
   1. Accolades
   2. Reprimands
   3. A and B
   4. Neither A nor B

Avoid using your coach session as a venue to deliver reprimands, sanctions, bad news, etc.

1. Building trust takes \_\_\_\_\_\_\_\_\_\_\_\_.
   1. Practice
   2. Dedication
   3. A and B
   4. Neither A nor B

Building trust takes practice and dedication to being sensitive to your employee’s needs.

# Module Eight: Providing Feedback

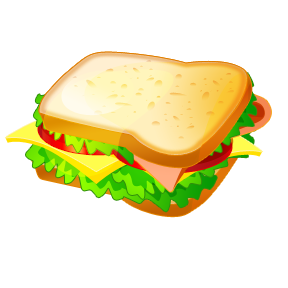
*I’ve learned that mistakes can often be as good a teacher as success.*

***Jack Welch***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900233020[1].wmfIn the last module, we discussed the importance of establishing trust and its relation to the coaching process. Although building trust is a personal investment you must make, you are still required to provide both negative and positive feedback.

Understanding how to structure feedback is essential in balancing trust with the need to discuss desired and undesired behaviors with your employee. In this module, you are going to learn techniques for delivering feedback well.

## The Feedback Sandwich

Initiating the feedback process could be a stressful situation if done incorrectly. However, as managers, we have to make tough discussions with our employees. In the world of giving feedback, time is of the essence. You want to be comfortable when giving feedback. When you are comfortable, your employee will be comfortable.

The Feedback Sandwich is a method of introducing feedback surrounded by praise. Start the conversation by briefly reviewing a positive aspect that your employee is currently demonstrating. It could be a good attitude; a well-executed sales pitch, etc. Be careful not to spend too much time praising at the beginning, because your “meat” of the feedback message will be diluted. Remember, the reason for speaking to your employee at this time is to deliver feedback.

Next, deliver the opportunity for growth in a positive tone. Avoid accusing your employee, but remain focused on the message you must deliver. In the next lesson, we will discuss how to structure constructive criticism. For now, remember this is the largest part of your dialogue.

Finally, close the feedback session on a positive note. Praise the employee on a strength they have or tell them you are confident they are going to adjust and be successful. This helps the employee overcome the embarrassment that is associated with receiving feedback.

To review, you want to structure your feedback sandwich by starting with praise, then delivering the opportunity for growth and closing with praise again. This is easy to remember if you recall the acronym **POP**.

Here is a sample delivery:

**Praise:** *John, your sales attempts this month are doing well because you are asking good probing questions up front and I appreciate your work*.

**Opportunity for growth:** *Here is something I noticed. When a customer says, “No” to your attempt, you immediately stop selling and abandon the sales attempt. This is where you should use more questions. As a result, your sales percentage is one of the lowest on the team.*

**Praise:** *I know you are capable of asking more questions because you build good rapport with our customers.*

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand how to introduce and give negative feedback with a positive tone. |
| **Lesson Summary** | The Feedback Sandwich is a method of giving negative feedback amidst praises, in the following order:   * Praise * Opportunity for growth * Praise   Alternatively, just remember POP. |
| **Materials Required** | * [Worksheet 17: Feedback Sandwich scenario](#_Worksheet_17) |
| **Planning Checklist** | * Have enough worksheets for participants. * Have a couple of examples of how to use the technique to share with the class |
| **Recommended Activity** | * Distribute worksheets * Have participants read each scenario * Have them write a POP response * Have participants share their response with their tablemates * Encourage questions |
| **Delivery Tips** | Start the activity off with an example from your experience of using the feedback sandwich technique. Let them know this will take time and practice to perfect. |

## Providing Constructive Criticism

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900082311[1].wmfProviding constructive criticism is a skill that requires you to focus on four key areas.

First, focus on one issue at a time. Avoid addressing multiple issues. This will only cause confusion and frustration. Identify the issue and create a plan to address this.

Second, focus on being timely. Once you identify an issue, make sure you do not wait too long to deliver the critique. The more time passes, the less affective it will be. Your employee may even forget what they did.

Third and most importantly, focus on observable actions or behaviors. Avoid generalities. For example, do not say, “You have an issue with time management.” This statement is lacking an observable action or behavior. Instead, you might want to say, “I notice you spend extra time talking to other employees on your way to meetings, making you late to most of them.” The observable behavior is “talking to other employees.” With this behavior identified, you are now able to focus on the next point.

Fourth, focus on a plan to change the behavior. Depending on the extent of change that must happen, your plan may be a simple adjustment. However, if it is complex, then use your SMART goal writing technique to help your employee set successful goals.

Now, let’s learn how to encourage growth and development.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will define the focal points of providing constructive criticism. |
| **Lesson Summary** | There are four focal points to providing constructive criticism. They are:   * Focus on one issue at a time * Focus on being timely * Focus on observable actions or behaviors * Focus on a plan to change behavior |
| **Materials Required** | * [Worksheet 18: Constructive Criticism](#_Worksheet_18) * [Worksheet 19: Constructive Criticism Job Aid](#_Worksheet_19) * Power point or flip chart with four focal points |
| **Planning Checklist** | * Have enough worksheets for all participants * Prepare power point or flip chart in advance |
| **Recommended Activity** | * Distribute worksheets * Have tablemates elect a table leader * Instruct participants to recall a time when they received great constructive feedback. * Have them write down the elements that made it great * Have them share with their tablemates * Have table leader jot down one response from each person at the table * Have table leaders share their summary with the class * Display power point or flip chart and go over points * Distribute job aid worksheets * Encourage questions |
| **Delivery Tips** | Monitor activity by walking around room ensuring all participate. |

## Encouraging Growth and Development

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900071368[1].wmfEncouraging growth and development is really providing opportunities to learn. When we give our employees opportunities for growth, we send the message that we value them and are willing to invest time, effort, and sometimes money into their development.

As managers, we should foster an environment of learning. Here are some ways to provide learning opportunities for your employees:

* Develop a peer mentorship process
* Use your internal training department
* Send your employee to another department to learn something new
* Start a book of the month club where your employees read, on company time, a few pages at a time
* Use your team meeting as a venue for team learning
* Send your employees to seminars, if your budget allows

A good approach is to create a menu of opportunities for your employees to learn. Remember that learning styles vary among adults. Therefore, try different approaches.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand how to encourage and develop their employees by providing opportunities to learn. |
| **Lesson Summary** | Investing and providing opportunities to learn for your employees is a way to encourage growth and development. |
| **Materials Required** | * Power point or flip chart with lesson summary on it * Flip chart * Markers |
| **Planning Checklist** | * Have clean flip chart ready before lesson begins * Have enough blank flip chart paper for each table prepared before the lesson |
| **Recommended Activity** | * Display power point slide or flip chart * Ask for ways to provide opportunities for employees to learn * Distribute a piece of flip chart paper to each table * Have the participants discuss learning options for their employees * Have them write their ideas on the flip chart paper * Have each table present their ideas * Instruct other tables to scratch off any repeats on their list * Go around the room until all tables shared * Encourage questions |
| **Delivery Tips** | When participants are writing down their answers, go around the room watching for those participants that are not involved. Encourage them to share their thoughts with the team. |

## Practical Illustration

Mary was a good coach, but she found it difficult to give feedback when an employee's work was less than expected or they didn't reach the goals that were set. Mary knew that when she needed to mention something for the employee to work on, it was often a good idea to let them know of the areas they have improved on or excel at. When constructive criticism has to be given, Mary remembers to always weigh the good with the bad to ensure that the employee understands their value and is more receptive to the negative aspects of the criticism.

## Module Eight: Review Questions

1. Which of the following statements is true?
   1. You are required to provide only the positive feedback
   2. You are required to provide only negative feedback
   3. You are required to provide both positive and negative feedback
   4. Feedbacks are not required, they are optional

Although building trust is a personal investment you must make, you are still required to provide both negative and positive feedback.

1. A method of introducing feedback to your employee surrounded by praise is called:
   1. The feedback stew
   2. The feedback sandwich
   3. The feedback doughnut
   4. The feedback pizza

The Feedback Sandwich is a method of introducing feedback surrounded by praise.

1. The method of introducing feedback starts with:
   1. Reviewing a positive aspect your employee is currently demonstrating
   2. Reviewing a negative aspect your employee is currently demonstrating
   3. Casual conversation for breaking the ice
   4. Accusing the employee for the mistakes

Start the conversation by briefly reviewing a positive aspect that your employee is currently demonstrating.

1. The feedback session should be closed in a:
   1. Warning note
   2. Neutral note
   3. Positive note
   4. Serious note

Close the feedback session on a positive note.

1. Providing constructive criticism is a skill that requires you to focus on:
   1. Everything at once
   2. The key areas
   3. A couple of topics
   4. None of the above

Providing constructive criticism is a skill that requires you to focus on four key areas.

1. Which of the following statements IS NOT true?
   1. Providing constructive criticism requires you to focus on being timely
   2. Providing constructive criticism requires you to focus on one issue at a time
   3. Providing constructive criticism requires you to focus on observable actions or behaviors
   4. Providing constructive criticism requires you to focus on anything you want at the moment

Providing constructive criticism is a skill that requires you to focus on four key areas.

1. Understanding how to structure feedback \_\_\_\_\_\_\_\_\_.
   1. Not imperative
   2. Is essential
   3. Is up to the employee
   4. Is up to everyone

Understanding how to structure feedback is essential in balancing trust with the need to discuss desired and undesired behaviors with your employee.

1. How should you begin the Feedback Sandwich?
   1. By describing all the issues you have with your employee
   2. By briefly reviewing a positive aspect of the employees behavior
   3. A and B
   4. Neither A nor B

Start the conversation by briefly reviewing a positive aspect that your employee is currently demonstrating.

1. When providing constructive criticism, focus on \_\_\_\_\_\_\_\_\_\_\_\_\_.
   1. What you will say
   2. Observable behavior
   3. Specific actions of the employee
   4. B and C

When providing constructive criticism, focus on observable behaviors and actions, don’t generalize.

1. As managers, we should foster an environment of \_\_\_\_\_\_\_\_\_.
   1. Working
   2. Discipline
   3. Learning
   4. None of the above

As managers, we should foster an environment of learning.

# Module Nine: Overcoming Roadblocks

*Obstacles are those frightful things you see when you take your eyes off your goal.*

***Henry Ford***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\OVV8IZ9R\MC900367648[1].wmfRoadblocks manifest in many different forms. You should expect roadblocks to occur. It is common to encounter them during the coaching process. Roadblocks, however, should not spell an end to the coaching process. It is natural for it to happen because we are expecting behavioral change, which in and of itself, is a task for your employee.

In this module, we will discuss ways to overcome roadblocks. Some of the topics to be covered will include identifying common roadblocks, re-evaluating goals and focusing on progress. Roadblocks are not dead ends. They are warning signs that will help you identify when you need to intervene and get your employee back on track.

## Common Obstacles

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900389038[1].wmfCoaching is a two-way street. The manager must be just as engaged as the employee. A lack of zeal and honesty creates roadblocks that will hinder your employee’s ability to reach their goals. Here are some common obstacles we as managers create:

* Do not have enough time to coach properly
* Lack of confidence in coaching
* Fear of confrontation
* Feels awkward
* Fear of failure in coaching
* Afraid employee will not respond

Now, from the employee’s perspective, here are some common obstacles they may encounter:

* Home/life issues are blocking progress
* Fear of losing their job
* Lack of confidence reaching the goal
* Denial there is anything wrong
* Poor relationship with the coach

Obstacles come in many different forms. However, the root of the obstacles typically comes from a personal deficiency in their life situation. Maslow’s theory of needs outlines basic needs we all must have in order to reach higher order needs. Here is brief overview of the needs.

* Physical need
* Safety need
* Social need
* Esteem need
* Growth need

The basics of all needs are the physical and safety needs. If a person is lacking in either of these areas, they will find it difficult to progress further into the higher needs. For example, if you know your employee is having issues at home, their physical or safety need may be at risk, creating an obstacle to reaching a goal, which is a higher order need. When faced with a needs issue, try your best to acknowledge the need and guide them to a qualified resource to assist them with this issue.

Let us look at how to re-evaluate goals and redirect the employee back to achieving the goal.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will identify the most common obstacles to reaching goals. |
| **Lesson Summary** | Obstacles to coaching come from both the employee and the manager. |
| **Materials Required** | * [Worksheet 20: Obstacles activity](#_Worksheet_20) |
| **Planning Checklist** | * Have enough copies of activity for all participants * Have the answer key ready |
| **Recommended Activity** | * Distribute activity to all the participants * Instruct them to either place an E, for employee, or M, for manager, next to the obstacle listed on the paper * Give them 5 minutes then go over the answers * Encourage questions |
| **Stories to Share** | Many times when I am about to coach an employee, I tend to have to check my attitude. Sometimes I may be the one that puts obstacles in place. We as managers must ensure that the coaching activity is guarded against what is going on in the rest of the world. Failing to do so, lessens the importance to the coaching process for both you and your employee. |
| **Delivery Tips** | Make sure you walk around the room and help those who are not participating. Guide them and encourage them to participate. |

## Re-evaluating Goals

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900215880[1].wmfAs time passes from the original coaching session, you want to check in on your employee and see where they are at, in respect to the goal that was set. It is at this point, where you may want to re-evaluate the goal and determine if it is still SMART.

There are several things you want to take into consideration when re-evaluating goals. First, re-evaluating does not mean that you have to change it. Re-evaluating is an opportunity to check on the goal and to determine how your employee is doing in achieving this goal. Here are some steps you want to take when re-evaluating a goal:

* Revisit the starting point. You want to review where you began, this way you are able to see if progress has been made and your employee is moving towards the goal.
* Determine what has been accomplished. Look at what the current performance level is and compare it to the starting point determined earlier.
* Review the amount of time left in respect to the goal date. You want to see if the amount of improvement is aligned with how much time has passed or how much time is left before the goal date is reached.
* Determine if the time remaining before the goal date is adequate to fulfill the goal. Here you want to see if there is still enough time to improve and reach the goal.
* If not enough time is left to accomplish the goal by the goal date, then set a new goal and goal date based on how much improvement has been accomplished and the time it took to get there.
* If there is still enough time, set smaller goals to help the employee move towards the established general goal.

In overcoming roadblocks, you may need to be more flexible. Perhaps the goal originally seemed like a viable goal, but when put into practice it becomes apparent that you will not be able to reach it. Do not become frustrated. Be flexible and understanding if you have to reset a goal.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify the steps to re-evaluating goals |
| **Lesson Summary** | The essential steps to re-evaluation goals are:   * Review the starting point * Determine what has been accomplished * Review how much time has passed or is left in respect to the goal date * Determine if the time left is adequate to continue * If not enough time, then set a new goal and goal date * If enough time, then set smaller goals to help employee move on |
| **Materials Required** | [Worksheet 21: Goal Re-evaluation](#_Worksheet_21) |
| **Planning Checklist** | * Have enough worksheets for all participants * Become familiar with the steps to re-evaluating goals |
| **Recommended Activity** | * Distribute worksheet * Have participants identify a goal that must be re-evaluated. It could be a working or personal goal. * Have them work through the worksheet * Give them about 5 minutes to complete * Encourage volunteers to share their re-evaluation. * Encourage questions. |
| **Delivery Tips** | Walk around room and monitor participation. Help those who are struggling and give them ideas they can use to help with the activity. |

## Focusing on Progress

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900324764[1].wmfIf you find yourself with an employee struggling with reaching their goals, you may be tempted to pull them aside and discuss how they are missing the mark and what the related consequences may be.

Focusing on the negative aspects will only create more obstacles. Refer to the hierarchy of needs mentioned earlier. If you start making the coaching session feel more negative, the employee may feel that their job is threatened. If this happens, they will become more fearful; adding to the already existing roadblocks.

Instead of focusing on the negatives, focus on the progress. Tell your employee that you see progress and that you believe that they are able to meet their goals. Speaking positively expands the employee’s belief about themselves. Use encouraging phrases like the ones here:

* I know you are not quite there yet, but you managed to improve this much in such a short amount of time.
* Your progress is steady and you are showing promise that you will reach that goal.
* You showed definite improvement since our last discussion. I am confident you are going to meet this goal.

The benefits of focusing on progress could reap the following:

* Increased communication between you and your employee
* Increased trust
* Increased motivation
* Goal is reached
* Build good relationship with your employee
* Employee’s confidence is boosted

You reap what you sow: if you speak positively, then positive things surface, but if you speak negatively, you will get a negative reaction.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand how to leverage progress in keeping their employees motivated. |
| **Lesson Summary** | Focusing on the positive progress your employee is making helps them overcome obstacles. |
| **Materials Required** | * Paper to write on * Pens |
| **Planning Checklist** | * Make sure participants have something to write on * Be familiar with the talking points in the lesson below before class |
| **Recommended Activity** | * Instruct participants to be ready to note ideas on a piece of paper * Cover ideas and concepts mentioned in the lesson below * Have participants reflect on their own what actions steps they can take to focus more on progress * Have them write this down on their action plan sheet * The participants do not have to share this * Encourage questions. |
| **Stories to Share** | I noticed that the conversation goes much smoother when I focus on the progress than on the negative aspects. The employee is more open to discussion and receptive to my coaching. |
| **Delivery Tips** | Tell participants to be ready to jot down ideas as you discuss the benefits of focusing on the progress. |

## Practical Illustration

Bob knew that as a coach, he and the employee he works with may face obstacles. Upon first meeting Rory, Bob had feelings of doubt in his ability to coach him. Regardless, Bob continued without a hitch. Rory and Bob developed a good relationship. Bob eventually had to re-evaluate the goals that he and Rory had originally made. He found that while Rory was making progress, he was not making the progress in a timely fashion. After a few adjustments to their original options, they came to a solution that continued Rory's progress and allowed him to reach his goal in time. Bob also gained confidence in himself as a coach.

## Module Nine: Review Questions

1. Which of the following IS NOT listed as the common obstacle we, as managers, create?
   1. Feels awkward
   2. Fear of confrontation
   3. Denial there is anything wrong
   4. Afraid employee will not respond

The common obstacles mentioned were: Do not have enough time to coach properly. Lack of confidence in coaching. Fear of confrontation. Feels awkward. Fear of failure in coaching. Afraid employee will not respond.

1. The basics of all needs are:
   1. The physical and the safety needs
   2. The physical and the social needs
   3. The safety and the social needs
   4. The physical and the growth needs

The basics of all needs are the physical and safety needs. If a person is lacking in either of these areas, they will find it difficult to progress further into the higher needs.

1. Which of the following IS NOT one of the steps you should take when re-evaluating your goals?
   1. Determine if the time remaining before the goal date is adequate to fulfill the goal
   2. Revisit the starting point
   3. Changing the goal
   4. Determine what has been accomplished

Re-evaluating does not mean that you have to change it.

1. If there is enough time for accomplishing the goal, you should:
   1. Set smaller goals to help the employee move towards the established general goal
   2. Make the general goal more complicated and challenging
   3. Congratulate the employee and wait for the goal to be accomplished
   4. Not do anything

If there is still enough time, set smaller goals to help the employee move towards the established general goal.

1. If you find yourself with an employee struggling with reaching their goals, you should:
   1. Focus on the negative aspects to detect the problems
   2. Focus on the progress
   3. Change the goals
   4. Modify the goals

Instead of focusing on the negatives, focus on the progress.

1. Which of the following IS NOT one of the benefits when you focus on progress?
   1. Building trust
   2. Increasing motivation
   3. Establishing the faster tempo of working
   4. Increasing the communication

Establishing a faster tempo of working was not mentioned as a benefit.

1. According to the information in this module, \_\_\_\_\_\_\_ is a two-way street.
   1. Goal-setting
   2. Coaching
   3. Overcoming obstacles
   4. Progress

Coaching is a two-way street.

1. Which of the following is considered an obstacle for an employee?
   1. Home/life issues are blocking progress
   2. Fear of losing their job
   3. Denial there is anything wrong
   4. All of the above

All are considered potential obstacles for any employee.

1. If not enough time is left to accomplish the goal by the goal date, then \_\_\_\_\_\_\_.
   1. Start over
   2. Set a new goal
   3. A and B
   4. Neither A nor B

If not enough time is left to accomplish the goal by the goal date, then set a new goal and goal date based on how much improvement has been accomplished and the time it took to get there.

1. The root of obstacles typically comes from a personal deficiency in real life situations.
   1. True
   2. False

The root of the obstacles typically comes from a personal deficiency in their life situation. Maslow’s theory of needs outlines basic needs we all must have in order to reach higher order needs.

# Module Ten: Reaching the End

*The reason goals are not reached is that we spend time doing second things first.*

***Robert J. McKain***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900058904[1].wmfIdentifying the end of the coaching process is a step that helps both you and your employee acknowledge you have both reached a particular goal. Failing to acknowledge the achievement of a goal could result in disappointment for your employee. Many times, they are anticipating the end and perhaps expect some form of celebration or kudos. No matter how you do it, as a coach, you must know when your employee has reached their goal, and acknowledge it.

In this module, you will learn to recognize success, transition your employee from this coaching goal to another, and wrapping it up.

## How to Know When You’ve Achieved Success

Determining if success has been achieved is a crucial element to the coaching process. If you fail to recognize success, you could hurt your coaching program. Your employee worked hard to reach their goals and it is your job to recognize when they have been achieved.

Taking inventory of your employee’s accomplishments helps you to determine how well your employee is doing. This inventory could also help you determine if your employee is ready to move into the next level of their development.

Here are some areas to review when taking inventory:

* Review the goals and compare them to if/how they were met
* Review where your employee was at the beginning of the coaching process and how far they have progressed
* List the behaviors your employee demonstrated during the coaching progress
* List your employee’s strengths
* List your employee’s weaknesses
* List your expectations and compare them to how well your employee meets or exceeds your expectations
* If applicable, determine if your employee is ready for the next level of their development

If you noticed, there are two levels of success. The first level is creating the immediate goal. During the course of your employee’s development, you will probably set various goals. You may use this inventory to determine if those goals are successful, and then move on to the next goal.

On the other hand, you may use this to help you determine if your employee has achieved overall success and is ready to move on to more development in other areas, like management.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand when success is achieved. |
| **Lesson Summary** | Once you have reached the goal date, it is time to compare the beginning metrics with end metrics, determining if success is reached. It is time to take inventory of your employee’s performance. |
| **Materials Required** | * [Worksheet 22:](#_Worksheet_22) Blank coaching inventory checklist worksheet * [Worksheet 23](#_Worksheet_23): Sample completed coaching inventory checklist |
| **Planning Checklist** | * Prepare enough worksheets for all participants |
| **Recommended Activity** | * Give [Worksheet 22](#_Worksheet_19_1) to a participants * Have them review it for 3 minutes * Give completed sample-[Worksheet 23](#_Worksheet_23) * Allow them to review it for 2 minutes * Encourage questions. |
| **Delivery Tips** | Walk around room while the participants review worksheets and be ready to answer questions. |

## Transitioning the Coachee

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900367520[1].wmfTransitioning is moving your employee to the next level of development. You may also transition your employee to the next developmental goal. In any case, it is a good practice to make a clear transition. Making it clear tells the employee they achieved success and are ready to take on new challenges.

Failure to transition may frustrate the employee over time. Transitioning closes one door and opens the next. Below are the steps to making a good transition:

* Make a statement of success. This is a purposeful announcement you make to your employee as a way to mark the transition. Here is a sample:

*“John, you have accomplished a great deal over the last year. Today marks the beginning of a new phase of development for you.”*

* Overview of accomplishments given: here you review what your employee has accomplished and how well they did; express your pride in their achievements.
* Verify your employee agrees. You want to ensure that you and your employee are on the same page. They may not quickly understand that you are about to move them into another level of development. Use open-ended questions to help you determine if your employee is in fact ready to transition. If they are not ready, then set goals to help them address those concerns and coach them through it, using SMART goals and the GROW coaching process.
* Engage the employee with the next level of development. You should have a plan in place that outlines the transition. Share this plan with your employee and have them engage it as soon as possible. Perhaps you have to hand them off to another manager for development, then introduce the employee to that manager.

Always make sure your employee is ready for the next level of development. If you feel this employee is ready to move on to the next step in their career, encourage development of the next goal.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will identify the steps to transiting their employee to other areas of development. |
| **Lesson Summary** | Using the MOVE steps will help you transition your employee the next level of development by:   * **M**ake a statement of success * **O**verview of accomplishment * **V**erify your employee is in agreement * **E**ngage the employee with next level of development. |
| **Materials Required** | * [Worksheet 24: MOVE](#_Worksheet_24) |
| **Planning Checklist** | * Print enough MOVE worksheet |
| **Recommended Activity** | * Distribute worksheet * Have them review it for 2-3 minutes * Encourage questions |
| **Stories to Share** | One of the best experiences I ever had is when I helped an employee reach their goals and transition into the next level of development. Usually they come back to me and thank me for my help. |
| **Delivery Tips** | Move around the room and clarify any confusion you may see at the tables. |

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## Wrapping it All Up

Wrapping it all up is just a matter of organizing your employee’s coaching file and transitioning the file to the next manager for reference. Even if you do not plan to transition your employee to a new manager, wrap up the coaching file and keep it accessible for future use.

Here are some things you want to do so you can wrap this coaching file up:

* Have all the coaching documents related to your employee placed in a file folder. If it is electronic, do the same.
* Use the wrap-up worksheet and place that as the first page of the coaching file. The Wrapping it up worksheet outlines the following:
* Employee’s profile (i.e. name, years at organization, job title, etc.)
* List of achievements
* List of positive behaviors
* List of areas for further development
* List of goals your employee would like to achieve
* Your overall assessment
* Your recommendation
* Brief outline of the next events

Your employee’s coaching sessions are now transitioning into something else. Let us look at what mentoring is and how to leverage that in to a form of development for your employee.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will define the elements of wrapping up the employee’s coaching session for transitioning. |
| **Lesson Summary** | Writing a summary for your employee’s transition helps to document items for the next development resource like another manager or mentor. |
| **Materials Required** | * [Worksheet 25: Wrapping it up](#_Worksheet_25) |
| **Planning Checklist** | * Make sure each participant has a copy of this worksheet * Become familiar with the worksheet and its components. |
| **Recommended Activity** | * Distribute worksheet * Have participants review it for 3 minutes * Encourage questions * Have participants discuss at their tables how they plan to use this worksheet - give them 2-3 minutes * Encourage feedback from participants. |
| **Delivery Tips** | Walk around room, ensuring all students are participating and be ready to answer questions. |

## Practical Illustration

Rob coached John on his sales performance. Rob determined that John had completed his goal in the six month period they had agreed upon and was ready to start transitioning towards a new goal. Rob congratulated John on his vast improvement since the start of the coaching, and made sure John was ready for the transition. Rob was satisfied and made a positive recommendation when he turned in his overall report on John's progress. John had exceeded expectations and was ready for the next stage of development. Rob had improved as well in his experience and confidence in his own coaching abilities.

## Module Ten: Review Questions

1. Which of the following statements IS NOT true?
   1. Determining if success is achieved is a crucial element to the coaching process
   2. If you fail to recognize success, you could hurt your coaching program
   3. Taking inventory of your employee’s accomplishments helps you to determine how well your employee has achieved success
   4. Regardless of the success, your employee should move into the next level after the coaching program

Your employee should only move on when they have mastered the first step/goal.

1. Which of the following IS NOT among the areas you should review when taking inventory?
   1. The behaviors your employee demonstrated during the coaching progress
   2. Your employee’s strengths
   3. Your expectations compared to how well your employee meets or exceeds your expectations
   4. Your employee’s speed of learning

Everyone learns differently, and at different speeds. It would not be fair to judge your employee’s speed of learning.

1. Which of the following IS NOT a good step for making a transition?
   1. Making a statement of success
   2. Overview of accomplishes given
   3. Mentioning the employee’s weaknesses
   4. Engaging the employee with the next level of development

Always focus on the positive; focusing on weaknesses may make your employee lose confidence in their abilities.

1. The transitions need to be:
   1. Clear
   2. Fast
   3. Slow
   4. Perfect

It is a good practice to make a clear transition.

1. Which of the following statements IS NOT true?
   1. Wrapping it all up is just a matter of organizing your employee’s coaching file and transitioning the file to the next manager for reference
   2. Even if you do not plan to transition your employee over to a new manager, you should wrap up the coaching file and keep it accessible for future use
   3. You should have all your coaching documents related to your employee placed in a file folder
   4. All the statements are true

According to this module, all statements are true.

1. Which of the following IS NOT something that Wrapping it up outlines?
   1. List of achievements
   2. Your recommendation
   3. List of employee’s negative traits
   4. List of goals your employee would like to achieve

Always focus on the positive traits of your employee.

1. When reaching the end of the coaching process, who has achieved the goal?
   1. You, the manager
   2. Your employee
   3. A and B
   4. Neither A nor B

Identifying the end of the coaching process is a step that helps both you and your employee acknowledge you have both reached a particular goal.

1. Determining if \_\_\_\_\_\_\_\_ has been achieved is a crucial element to the coaching process.
   1. Transitioning
   2. Success
   3. A pay raise
   4. A lateral movement

Determining if success has been achieved is a crucial element to the coaching process.

1. You want to ensure that you and your employee are \_\_\_\_\_\_\_\_\_.
   1. Compatible
   2. On the same page
   3. Meeting weekly
   4. None of the above

You want to ensure that you and your employee are on the same page.

1. Failure to transition may frustrate the employee over time.
   1. True
   2. False

True: Failure to transition may frustrate the employee over time. Transitioning closes one door and opens the next.

# Module Eleven: How Mentoring Differs from Coaching

*Mentoring is a brain to pick, an ear to listen, and a push in the right direction.*

***John Crosby***

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900071143[1].wmfEarlier in this workshop, we defined the terms coaching and mentoring. We learned that the concepts vary greatly in terms of the goal each sought to achieve. In this module, you are going to learn the practical differences and blend the two for a balanced development program. In addition, we will discover how to integrate the GROW model when you are mentoring your employee and finally, you will learn how to focus more on building relationships. Let us start by comparing the practical differences between coaching and mentoring.

## The Basic Differences

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900383516[1].wmfThere are differences between coaching and mentoring. Each typically has goals to accomplish, but the methods are vastly different.

Coaching has the following characteristics:

* Interaction is usually not voluntary
* The interaction usually is for a set amount of time.
* The interaction is structured, and meetings are typically confined to scheduled meetings
* The Coach does not necessarily have to be an expert on the coaching topic
* Generally, the interaction is short-termed and focuses usually in one or two areas of development
* The focus is on a particular job function developmental issue
* The goal is to produce a more immediate change or result
* Coaching is typically targeting specific opportunities for improvement

Mentoring has the following characteristics:

* Interaction is usually voluntary
* Relationship is usually long-term, over an extensive period of time
* Interaction is less structured and more causal than structured meetings
* The Mentor is usually regarded as an expert in their field and is a resource to the protégé
* Career development is the overall goal of mentoring
* The goal is to develop areas that the protégé deems necessary for their development for future roles
* Mentoring targets the entire career path of a protégé

Let us see how we can blend the two models for an effective development program for your employees.

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will identify the basic difference between coaching and mentoring. |
| **Lesson Summary** | Coaching an employee is usually involuntary, targeted one-on-one contact, and structured. Mentoring is usually voluntary and is less structured, but the contact may be more frequent. |
| **Materials Required** | * Flip chart paper * Markers * Paper to write on * Pens |
| **Planning Checklist** | * Have enough flip chart paper and markers for all tables * Make sure you are familiar with the differences before class |
| **Recommended Activity** | * Distribute a piece of flip chart paper to each table * Assign one table the concept of coaching * Assign the other the concept of mentoring * Alternate around the room until all tables either have coaching or mentoring as their category * Have the teams brainstorm the characteristics of their category * Allow them 5 minutes to do this * When time is up, go around the room and you go over each team’s paper * Make any necessary corrections by moving the listed item to either coaching or mentoring |
| **Delivery Tips** | When making corrections, be gentle about it and use positive reinforcement |

## Blending the Two Models

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900055102[1].wmfDepending on the type of working environment, and the overall goal of your employee, you may want to combine the characteristics of coaching with mentorship. What you decide to use depends on the current work environment, the type of advancement opportunity your employee has, and the time you or someone else have to give to develop the target employee.

There is no right or wrong answer when determining which characteristics you want to combine. Simply pick the ones that will help you achieve maximum results. For example, you may want to blend the more casual approach to meeting with your employee with a targeted area of development. On the other hand, you may want to blend the relationship-building aspect of mentoring to the planned meeting intervals.

The approach you determine is considered the best for your environment. Here is a list of benefits you realize when you combine coaching with mentorship:

* Increased flexibility
* Allows you to supervise your employee while acting autonomous
* Allows your employee to determine what they want to develop
* Your employee will feel more empowered in their development
* You can enlist the help of other managers in the development of your employee
* Greater satisfaction for both you and your employee

In essence, blending the two models provides more flexibility with the monitoring you need to ensure your employee is on the path to career development.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will understand the benefits of blending mentorship with coaching. |
| **Lesson Summary** | Creating a hybrid approach to development by combining the structured approach of coaching with the autonomy a protégé has while mentoring, reaps several benefits. |
| **Materials Required** | * Flip chart * Markers |
| **Planning Checklist** | * Make sure you have 2 pieces of clean flip chart for each table ready to distribute before the lesson begins |
| **Recommended Activity** | * Have the participants review the characteristics of coaching versus mentoring done in the previous lesson * In their teams, have them come up with a combined list of characteristics they feel would reap maximum results * Have them write the list on a piece of flip chart paper * Next, have the table brainstorm benefits to their approach * Allow 5-6 minutes for this to happen * Once done, go around the room and have the entire table stand up while one person presents their Hybrid strategy with the benefits to the class. * Go around the room until all tables have presented * Encourage questions |
| **Delivery Tips** | Creating a hybrid has no right or wrong answers. Try to remain neutral and not place one team’s idea over another. This may send the wrong message to the team you did not favor. |

## C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900215194[1].wmfAdapting the GROW Model for Mentoring

Adapting the GROW model to mentoring is very easy to do. When coaching, the GROW model is used as a guide for the coach to structure their dialogue with their employee. The coach develops the goal and guides the employee to reach a goal the coach selects.

In mentoring, the GROW model is used as a guide to questioning the protégé on which development path they want seek. Here, the mentor asks open-ended questions that form the basis of the mentoring program. Here are some questions you can use when you want to use GROW for mentoring purposes:

* **Goal**: What are your career goals? What do you want to accomplish in the next year?
* **Reality**: Where are you in relation to your career goal? What are you lacking that you need to have in order to reach that career goal?
* **Options**: What are activities you think will help you develop those missing skills? How do you want to go about developing the skills necessary to advance your career?
* **Wrap it up**: What is your plan? How do you want to implement this?

|  |  |
| --- | --- |
| **Estimated Time** | 10 minutes |
| **Lesson Objective** | Participants will understand how to adapt the GROW model to mentoring. |
| **Lesson Summary** | The GROW model is easily adapted to mentoring by allowing the employee to choose their goal, identify their reality, identify their options and draft their plan. |
| **Materials Required** | * Power point or flip chart with the lesson summary on it |
| **Planning Checklist** | * Make sure power point or flip chart is prepared before lesson begins |
| **Recommended Activity** | * Display the power point of flip chart * Have a participant read it to the class * Ask the class: “What skill or behavior must you have in order to get this information from your employee?” Target: **Questioning skills** |
| **Delivery Tips** | Avoid judging answers by saying, “That is wrong” or “That is correct”. Thank the participants for the answers they give and then share your target answer. Judging makes the participants less likely to volunteer answers. |

## Focusing on the Relationship

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900438083[1].wmfWhen you coach, the relationship is hierarchal, meaning that you are driving the process and the employee must respond. Mentoring is not meant to be set up that way. Mentoring is a shoulder-to-shoulder type relationship. In coaching your focus is on reaching a goal with a targeted development plan.

On the other hand, mentoring is sharing and guiding your protégé. It requires less structure but more relationship building. Being a mentor to someone creates a special relationship where the mentor watches over the protégé, guides them, and corrects them in different situations. There is not a set intervention. It is constant awareness, looking out for pitfalls and political traps that are common in the work environment.

Mentors also become more involved in the protégé’s life, demonstrating caring, understanding, and guiding them from an employment perspective. Deep personal issues should be taken care of by professionals; however, guiding them to that professional level is a mentor’s job.

Here are some behaviors that help to foster a good relationship between a mentor and a protégé:

* Demonstrate caring by listening for issues that are not readily disclosed to you. Perhaps you over hear a conversation where your protégé is struggling with something. Demonstrate care by encouraging your protégé to discuss it with you.
* Demonstrate understanding by acknowledging and empathizing with your employee’s situation. Take the time to fully grasp what is going on and acknowledge it is real and that you would feel the same if you were in their shoes.
* Demonstrate listening by giving your undivided attention and avoid interruptions when talking with them. Notate and mirror things back to your protégé to demonstrate you are listening.
* Demonstrate respect by keeping the relationship professional at all times. Avoid degrading your protégé or using causal language in front of others. Always show respect for your employee.

Keeping an eye on the relationship is just as important as keeping focus on the goal. The mentor-protégé relationship is delicate because the employee must see the value of the relationship. If they do not see a relationship, then the purpose for mentoring is gone.

We are near the close of this workshop, and it is time to wrap this class up. Let us here some words from the wise before we do close this session.

|  |  |
| --- | --- |
| **Estimated Time** | 15 minutes |
| **Lesson Objective** | Participants will understand the importance of focusing on the relationship when mentoring an employee. |
| **Lesson Summary** | Demonstrating caring, listening, understanding and respect are essential ingredients to a mentor-protégé relationship. |
| **Materials Required** | * Index cards * Pens * Two pieces of flip chart paper * Markers |
| **Planning Checklist** | * Make sure there are pens and index cards on all tables before lesson starts * Make sure you have a clean piece of flip chart paper ready before the lesson starts. |
| **Recommended Activity** | * Ask the class: *What are the basics to building a relationship?* * Select several participant’s answers * Write down answers on flip chart * Target answers: **caring, listening, understanding, respect** * Ask: *What are some of the ways we can demonstrate these in terms of our behaviors?* * Solicit answers from the group and write down their answers on another piece of flip chart paper * Encourage questions |
| **Delivery Tips** | When you are collecting answers, remember not to judge the answers. Thank the participants for sharing and focus on the target answers when you debrief the class. |

## Practical Illustration

Dave was the floor manager of a paper mill. He was asked to coach a sales representative named Jerry so that he may more effectively help the company. Dave wanted to devote more time to Jerry, but was still needed as the floor manager. Dave decided upon a blend of coaching and mentoring so that he could still remain the floor manager and coach Jerry at the same time. The combination of the two methods did more than that though. He soon realized that Jerry was benefiting as well. He had a sense of empowerment and confidence because he was more influential in his development, and he was receiving coaching from a variety of experienced managers and supervisors that gave him a bigger source of knowledge to draw from. Dave felt the compromise worked out for both of them.

## Module Eleven: Review Questions

1. Which of the following IS NOT a characteristic of coaching?
   1. The interaction usually is for a set amount of time
   2. Interaction is usually voluntary
   3. The goal is to produce a more immediate change or result
   4. The interaction is structured and meetings are typically confined to scheduled meetings

Voluntary interaction is a trait of mentoring.

1. Which of the following IS NOT a characteristic of mentoring?
   1. The focus is on a particular job function developmental issue
   2. The goal is to develop areas that the protégé deems necessary for their development for future roles
   3. Interaction is less structured with more causal than structured meetings
   4. Relationship is usually long-term over an extensive period of time

Focusing on a particular job function developmental issue is a trait of coaching.

1. Which of the following statements is true?
   1. Coaching and mentoring never combine
   2. Coaching and mentoring always combine
   3. Coaching and mentoring can be combined
   4. It is not good to combine coaching and mentoring

The premise of this module is that the two can be combined.

1. Which of the following can be the result of combining coaching and mentoring?
   1. Decreased flexibility
   2. Confusions about further development
   3. Losing authority
   4. Greater satisfaction for both you and your employee

One benefit to combining the two methods can be greater satisfaction for both you and your employee.

1. What is the acronym of the model used as a guide for the coach to structure their dialogue with their employee?
   1. GRAW
   2. GREW
   3. GROW
   4. GRUW

Option C - GROW

1. What does the letter R in the acronym of the model used as a guide for the coach presented in previous module?
   1. Rationalization
   2. Reality
   3. Reasoning
   4. Randomization

R= Reality

1. Basically, coaching and mentoring are very similar.
   1. True
   2. False

False: The concepts vary greatly in terms of the goal each sought to achieve.

1. The Coach is an expert on the coaching topic.
   1. True
   2. False

The Coach does not necessarily have to be an expert on the coaching topic.

1. \_\_\_\_\_\_\_\_\_ is used as a guide to questioning the protégé on which development path they want seek.
   1. Coaching
   2. Mentoring
   3. GROW
   4. None of the above

In mentoring, the GROW model is used as a guide to questioning the protégé on which development path they want seek.

1. There is no \_\_\_\_\_\_\_\_\_ answer when determining which characteristics you want to combine.
   1. Right
   2. Wrong
   3. A and B
   4. Neither A nor B

There is no right or wrong answer when determining which characteristics you want to combine. Simply pick the ones that will help you achieve maximum results.

# Module Twelve: Wrapping it Up

*Things do not change; we change.*

***Henry Davie Thoreau***

This is the last module of today’s session. We have learned many things about Coaching and Mentoring. Implementing what you have learned today immediately is the best way to start making changes. Remember that coaching plus mentoring is an equation that includes you. Your employees will respond better if they see you are willing to change to help them reach higher performance.

## Words from the Wise

Here are some quotes from wise leaders in the coaching field. Take a moment to listen and reflect on their words:

* **Lee Iacocca**: I have found that being honest is the best technique I can use. Right up front, tell people what you're trying to accomplish, and what you're willing to sacrifice to accomplish it.
* **John Wooden**: If you're not making mistakes, then you're not doing anything. I'm positive that a doer makes mistakes.
* **Pearl Buck**: I don't wait for moods. You accomplish nothing if you do that. Your mind must know it has got to get down to earth.
* **Warren Buffett**: I don't look to jump over 7-foot bars. I look around for 1-foot bars that I can step over.
* **George Allen**: People of mediocre ability sometimes achieve outstanding success because they don't know when to quit. Most men succeed because they are determined to.

## Lessons Learned

* Defined coaching, mentoring and the GROW model.
* Identified and set appropriate goals using the SMART technique of goal setting.
* Identified the steps necessary in defining the current state or reality of your employee’s situation.
* Identified the steps needed in defining options for your employee and turn them into a preliminary plan.
* Identified the steps in developing a finalized plan or wrapping it up and getting your employee motivated to accomplish those plans.
* Identified the benefits of building and fostering trust with your employee.
* Identified the steps in giving effective feedback while maintaining trust.
* Identified how to overcome common obstacles to the growth and development of your employee.
* Identified when the coaching is at an end and when it is time to transition your employee to other growth opportunities
* Identified the difference between mentoring and coaching

## Parking Lot

Review the items on the parking lot. Some items may need one-to-one participant follow up. You may be able to clear other items up now. Follow-up workshops may even be appropriate.

## Action Plans and Evaluation Forms

Do a quick round robin and ask everyone to share one thing that they learned today. Then, ask participants to make sure their Action Plans and Evaluation Forms are complete.

If possible, ask participants to buddy up and set up a follow-up system, so that they can check up on each other in the coming days, weeks, and months. If appropriate, provide your contact information in case they have any questions.

# Appendix

## Worksheet 1

***A Coach is/A Mentor is Cards***

|  |
| --- |
| j0439239[1]A Coach is… |
| bd19908_[1]A Mentor is... |

## Worksheet 2

***Coach Characteristics***

|  |
| --- |
| A Trainer |
| An Instructor |
| Involuntary Participation |
| Focuses on few skills |
| Structured Interaction |

## Worksheet 3

***Mentor Characteristics***

|  |
| --- |
| A Guide |
| An Advisor |
| Voluntary Participation |
| Career Development |
| Informal Interaction |

## Worksheet 4

***Project without Goal***

|  |  |
| --- | --- |
| j0292418[1] | j0440382[1] |
| pe02070_[1] | j0441279[1] |
| j0441290[1] | j0397628[1] |
| Goal | |
| None | |
| Questions | |
| * What are you building? * How long will it take? * Where will it be located? * How will you know you succeeded? | |

## Worksheet 5

***Project with Goal***

|  |  |
| --- | --- |
| j0292418[1] | j0440382[1] |
| pe02070_[1] | j0441279[1] |
| j0441290[1] | j0397628[1] |
| Goal | |
| Develop shelter for a small aviary creature. | |
| Questions | |
| * What are you building? * How long will it take? * Where will it be located? * How will you know you succeeded? | |

## Worksheet 6

***Pre-Coaching***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date | | DATE | | TIME |
|  | |  |
|  | | | | |
| What goals are you working on right now? |  | | | |
| Where are you in relation to your goals? |  | | | |
| What do you think is keeping you from reaching this goal? |  | | | |
| How will you know you reached that goal? |  | | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |
| Notes | | | | |
|  | | | | |

## Worksheet 7

***SMART Goal***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date & Time | | DATE | | TIME |
|  | |  |
| SMART | | | | |
| Specific  What needs to be done? |  | | | |
| Measurable  What numeric value can be placed on the goal? |  | | | |
| Attainable  Is this goal relevant to your employee? Explain |  | | | |
| Realistic  Is there learning that has to take place in order to reach goal? What is it? |  | | | |
| Timely  When will this goal be reached? Give specifics |  | | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |
| Notes | | | | |
|  | | | | |

## Worksheet 8

***Getting a Picture***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date & Time | | DATE | | TIME |
|  | |  |
|  | | | | |
| What is happening now? |  | | | |
| What should be happening? |  | | | |
| How often is it happening? |  | | | |
| When does it happen? |  | | | |
| What is the affect? |  | | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |
| Notes | | | | |
|  | | | | |

## Worksheet 9

***IRA***

|  |  |
| --- | --- |
| j0437797[1] | **Identify** the obstacle: Have a frank discussion with your employee and determine what is blocking their performance. |
| j0290764[1] | **Root out** the cause: Many times underlying emotions or problems may be the cause of the obstacles. |
| j0281042[1] | **Antidote** given: A remedy to the situation is needed in order to get past this obstacle. Brainstorm with your employee on ways to remove the obstacles. |

Sample issue/antidote:

* Fear/knowledge
* Denial/acknowledge
* Lack of resources/give information, procedures
* Complacency/re-focus
* Entrenched culture/realign to vision

**IRA**

|  |  |
| --- | --- |
| Scenario One | |
| Your employee seems to be distracted at work. You see them always on the phone on break and alone and pensive during lunch. Their performance is beginning to suffer. | |
| Identify |  |
| Root Out |  |
| Antidote |  |
| Scenario Two | |
| This employee comes into work with a bored look upon their face. They lack zeal with the customers, but when you talk to them, they say everything is okay. Their performance has always been on the borderline. | |
| Identify |  |
| Root Out |  |
| Antidote |  |

## Worksheet 10

***BIG Developing Options Template***

|  |  |  |  |
| --- | --- | --- | --- |
| Employee’s Name | | DATE | TIME |
|  | | | |
| Buy-In  What ideas or suggestions can my employee share in their development? | Idea 1: | | |
| Idea 2: | | |
| Innovation  What are some creative ways we can implement this idea? | Idea 1: | | |
| Idea 2: | | |
| Growth  Are these ideas aligned with the growth necessary to succeed? | Idea 1: | | |
| Idea 2: | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Assess Pros And Cons** | | | | | |
|  | **Pros** | **Cons** | **Feasibility Rank** | **Relevance Rank** | **Overall Rating** |
| Buy-In Idea 1 |  |  |  |  |  |
| Buy-In Idea 2 |  |  |  |  |  |
| Innovation Idea 1 |  |  |  |  |  |
| Innovation Idea 2 |  |  |  |  |  |
| Growth Idea 1 |  |  |  |  |  |
| Growth Idea 2 |  |  |  |  |  |
| Next Meeting Date and Time | | | | | |

## Worksheet 11

***Coaching Scenario***

You are ready to start developing your options with your employee. Review the summary and draft some options that you gather form your employee.

**Summary:**

You are talking with your employee about improving their written communication skills. Their written communication tends to be too long and it lacks focus. Here are some points your employee makes during your coaching session.

* They like to read books
* They admire how well a specific co-worker writes
* They do not like classroom settings
* They seem to be okay with online learning programs

From this information, use the BIG worksheet to develop a couple of options. Remember to weigh the pros and cons and any other factors that may help or hinder these options—good Luck.

## Worksheet 12

***3T Form***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date & Time | | DATE | | TIME |
|  | |  |
|  | | | | |
| SMART Goal |  | | | |
| **3 Timeframes** | | | | |
| Tomorrow |  | | | |
| Two Weeks from today |  | | | |
| Thirty Days from today |  | | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |
| Notes | | | | |
|  | | | | |

## Worksheet 13

***LAMA Worksheet***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date & Time | | DATE | | TIME |
|  | |  |
|  | | | | |
| SMART Goal |  | | | |
| **LAMA** | | | | |
| Learn  How are you going to learn new skill? |  | | | |
| Apply new skill  When and how you are going to apply what you learned. |  | | | |
| Measurement  How are you going to measure your progress? |  | | | |
| Assess results  What results do you expect to see and by when? |  | | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |

## Worksheet 14

***Learning Resource Sheet***

|  |  |  |  |
| --- | --- | --- | --- |
| Employee’s Name | |  | |
| Today’s Date & Time | | DATE | TIME |
|  |  |
| New Behavior or Skill to be Learned | | | |
|  | | | |
| **Learning Resources** | | | |
| Type | Resource | Availability | Cost |
| Book |  |  |  |
| Training |  |  |  |
| Person |  |  |  |
| Other |  |  |  |
| Notes | | | |
|  | | | |

## Worksheet 15

***Get Them Motivated***

|  |  |
| --- | --- |
| Five B’s to Motivating | |
| Area | How can I support this? |
| Be Consistent |  |
| Be Respectful |  |
| Be Caring |  |
| Be Flexible |  |
| Be a cheerleader |  |

## Worksheet 16

***8-Steps to Building Trust***

|  |  |
| --- | --- |
| j0334108[1] | |
| 1. Maintain positive body language 2. Listen more and speak less 3. Always respect your employees 4. Keep things confidential | 1. Keep your promises 2. Be honest and transparent 3. Be confident in your work 4. Tell them you believe in them |

## Worksheet 17

***Feedback Sandwich Scenario***

Lately, your employee has been caught being short with their responses to the customers. By using short responses and phrases, customers are put on the defensive. When not with the customer, your employee is a team player and is dedicated to their work.

|  |  |
| --- | --- |
| Your Response | |
| Praise |  |
| Opportunity |  |
| Praise |  |

## Worksheet 18

***Constructive Criticism***

|  |  |  |  |
| --- | --- | --- | --- |
| Employee’s Name | |  | |
| Today’s Date & Time | | DATE | TIME |
|  |  |
| **Determine One Constructive Criticism to be Delivered** | | | |
|  | | | |
| **Be Timely** | | | |
| When did it happen? | | When do you plan to tell employee? | |
|  | |  | |
| **List Observable Behaviors (avoid general descriptions)** | | | |
|  | | | |
| **Plan to Change Behavior** | | | |
| What is changing? | How is it going to change? | When is going to change? | Expectations going forward |
|  |  |  |  |
| **Notes** | | | |
|  | | | |

## Worksheet 19

***Constructive Criticism Job Aid***

When giving constructive criticism, focus on the following:

|  |  |
| --- | --- |
| bd09500_[1] | Focus on one issue at a time |
| Focus on being timely |
| Focus on observable actions or behaviors |
| Focus on a plan to change behavior |

## Worksheet 20

***Obstacles Activity***

Beside each statement place either an **E** for **e**mployee, or an **M** for **m**anager

|  |  |
| --- | --- |
| Do not have enough time to coach properly |  |
| Lack of confidence reaching the goal |  |
| Fear of failure in coaching |  |
| Fear of confrontation |  |
| Fear of losing their job |  |
| Lack of confidence in coaching |  |
| Home/life issues are blocking progress |  |
| Feels awkward |  |
| Poor relationship with the coach |  |
| Denial there is anything wrong |  |

**Obstacles Activity (Answer sheet)**

Place an E for employee or an M for manager

|  |  |
| --- | --- |
| Do not have enough time to coach properly | M |
| Lack of confidence reaching the goal | E |
| Fear of failure in coaching | M |
| Fear of confrontation | M |
| Fear of losing their job | E |
| Lack of confidence in coaching | M |
| Home/life issues are blocking progress | E |
| Feels awkward | M |
| Poor relationship with the coach | E |
| Denial there is anything wrong | E |

## Worksheet 21

***Goal Re-Evaluation***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee’s Name | |  | | |
| Today’s Date & Time | | DATE | | TIME |
|  | |  |
| **Revisit Goal** | | | | |
| Original  SMART Goal |  | | | |
| **Re-Evaluation Steps** | | | | |
| Review the starting point |  | | | |
| Determine what has been accomplished |  | | | |
| Review how much time has passed or is left in respect to the goal date |  | | | |
| Determine if the time left is adequate to continue |  | | | |
| If | | Then | | |
| Not enough time | | Set a new goal and goal date | | |
| Enough time | | Set smaller goals to help employee move on | | |
| Next Meeting Date and Time | DATE | | TIME | |
|  | |  | |

## Worksheet 22

***Sample Coaching Inventory***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employee’s Name | |  | | | |
| Today’s Date | | DATE | | | TIME |
|  | | |  |
| Beginning | | End | | | |
| Planned End Date | 11/30/XX | Actual End Date | | | 12/3/XX |
| Attempted Goal |  |  | | |  |
| Behaviors to be changed |  | | | | |
| Behaviors that actually changed |  | | | | |
| Strengths |  | | | | |
| Opportunities |  | | | | |
| Expectations |  | | X | Exceeded | |
|  | Met | |
|  | Below | |
| What’s Next | | | | | |
|  | | | | | |

## Worksheet 23

***Sample Coaching Inventory***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employee’s Name | | Jessica | | | |
| Today’s Date | | DATE | | | TIME |
| 12/5/XX | | | 2:00 P |
| Beginning | | End | | | |
| Planned End Date | 11/30/XX | Actual End Date | | | 12/3/XX |
| Attempted Goal | 15% Sales | Goal Achieved | | | 15.2 % |
| Behaviors to be changed | Increase number of attempts by 25% | | | | |
| Behaviors that actually changed | Increased attempts to 32% | | | | |
| Strengths | Great attitude | | | | |
| Opportunities | Need to ask more open-ended questions | | | | |
| Expectations | Increase attempts  Be open to feedback  Have fun doing this | | X | Exceeded | |
|  | Met | |
|  | Below | |
| What’s Next | | | | | |
| Jessica is ready to focus on asking more open-ended question, leading to more information that could help her offer the right product to our customers. | | | | | |

## Worksheet 24

***MOVE***

j0312438[1]

Make a statement of success

Overview of accomplishment

Verify your employee is in agreement

Engage the employee with next level of development.

## Worksheet 25

***Wrapping It up***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employee’s Name |  | Position | | |  |
| How long in this position |  | Current Manager | | |  |
| Coaching Profile | | | | | |
| Achievements |  | | | | |
| Positive Traits |  | | | | |
| Areas for further development |  | | | | |
| Goals this employee is seeking |  | | | | |
| Overall Assessment |  | | | | |
| Recommendations |  | | | | |
| Next Steps |  | | | | |
| Manager’s Signature |  | | Today’s Date |  | |
|  | | | | | |

## Post-Assessment

1. As an example of coaching, a batting coach only focuses on the mechanics of \_\_\_\_\_\_\_\_\_\_.
   1. The player’s body
   2. The layout of the field
   3. Hitting the ball
   4. Running
2. \_\_\_\_\_\_\_\_\_\_ is more voluntary in nature and is less formal than \_\_\_\_\_\_\_\_\_\_.
   1. Mentorship, coaching
   2. Goal setting, Coaching
   3. Coaching, goal setting
   4. Coaching, mentoring
3. When coaching, it is a temptation for you to \_\_\_\_\_\_\_\_\_.
   1. Talk
   2. Listen
   3. A and B
   4. Neither A nor B
4. The A in SMART goals is:
   1. Approachable
   2. Attainable
   3. Action
   4. Application
5. What is the result when employees realize the impact on their own?
   1. More buy-in is created
   2. They will feel embarrassed
   3. Their chances of success are reduced
   4. None of the above
6. Using \_\_\_\_\_\_\_ helps to recap where your employee is at today.
   1. Goals
   2. The past
   3. Schedules
   4. Peer evaluations
7. It is imperative to keep the employee \_\_\_\_\_\_\_\_.
   1. Entertained
   2. Excited
   3. Engaged
   4. Employed
8. Once you determine the relevancy, you are able to multiply the feasibility rating with the \_\_\_\_\_\_\_\_\_ rating.
   1. Relative
   2. Relatable
   3. Reference
   4. Relevancy
9. The LAMA assessment date should correspond to the \_\_\_\_\_\_\_.
   1. SMART goal
   2. Last day of work
   3. End of the pay period
   4. None of the above
10. Offering your employee time away from the desk is considered being:
    1. A cheerleader
    2. Respectful
    3. Strict
    4. Flexible
11. Avoid using your coach session as a venue to deliver \_\_\_\_\_\_\_\_\_\_.
    1. Accolades
    2. Reprimands
    3. A and B
    4. Neither A nor B
12. Building trust takes \_\_\_\_\_\_\_\_\_\_\_\_.
    1. Practice
    2. Dedication
    3. A and B
    4. Neither A nor B
13. When providing constructive criticism, focus on \_\_\_\_\_\_\_\_\_\_\_\_\_.
    1. What you will say
    2. Observable behavior
    3. Specific actions of the employee
    4. B and C
14. As managers, we should foster an environment of \_\_\_\_\_\_\_\_\_.
    1. Working
    2. Discipline
    3. Learning
    4. None of the above
15. If not enough time is left to accomplish the goal by the goal date, then \_\_\_\_\_\_\_.
    1. Start over
    2. Set a new goal
    3. A and B
    4. Neither A nor B
16. The root of obstacles typically comes from a personal deficiency in their life situation.
    1. True
    2. False
17. You want to ensure that you and your employee are \_\_\_\_\_\_\_\_\_.
    1. Compatible
    2. On the same page
    3. Meeting weekly
    4. None of the above
18. Failure to transition may frustrate the employee over time.
    1. True
    2. False
19. The Coach is an expert on the coaching topic.
    1. True
    2. False
20. \_\_\_\_\_\_\_\_\_ is used as a guide to questioning the protégé on which development path they want seek.
    1. Coaching
    2. Mentoring
    3. GROW
    4. None of the above

## Post-Assessment Answers

1. As an example of coaching, a batting coach only focuses on the mechanics of \_\_\_\_\_\_\_\_\_\_.
   1. The player’s body
   2. The layout of the field
   3. Hitting the ball
   4. Running

In baseball, a batting coach only focuses on the mechanics of hitting the ball.

1. \_\_\_\_\_\_\_\_\_\_ is more voluntary in nature and is less formal than \_\_\_\_\_\_\_\_\_\_.
   1. Mentorship, coaching
   2. Goal setting, Coaching
   3. Coaching, goal setting
   4. Coaching, mentoring

Mentorship is more voluntary in nature and is less formal than coaching.

1. When coaching, it is a temptation for you to \_\_\_\_\_\_\_\_\_.
   1. Talk
   2. Listen
   3. A and B
   4. Neither A nor B

When coaching, it is a temptation for you to talk more because we have plenty to say.

1. The A in SMART goals is:
   1. Approachable
   2. Attainable
   3. Action
   4. Application

Attainable: Make sure the goal is not too much at one time to complete.

1. What is the result when employees realize the impact on their own?
   1. More buy-in is created
   2. They will feel embarrassed
   3. Their chances of success are reduced
   4. None of the above

When they realize the impact on their own, more buy-in is created.

1. Using \_\_\_\_\_\_\_ helps to recap where your employee is at today.
   1. Goals
   2. The past
   3. Schedules
   4. Peer evaluations

Using the past helps to recap where your employee is at today.

1. It is imperative to keep the employee \_\_\_\_\_\_\_\_.
   1. Entertained
   2. Excited
   3. Engaged
   4. Employed

It is imperative to keep the employee engaged. If not, the rest of the coaching session is just a one-way discussion, leaving your employee powerless in their own development.

1. Once you determine the relevancy, you are able to multiply the feasibility rating with the \_\_\_\_\_\_\_\_\_ rating.
   1. Relative
   2. Relatable
   3. Reference
   4. Relevancy

Once you determine the relevancy, you are able to multiply the feasibility rating with the relevancy rating.

1. The LAMA assessment date should correspond to the \_\_\_\_\_\_\_.
   1. SMART goal
   2. Last day of work
   3. End of the pay period
   4. None of the above

The assessment date should correspond to the SMART goal date.

1. Offering your employee time away from the desk is considered being:
   1. A cheerleader
   2. Respectful
   3. Strict
   4. Flexible

**Be flexible** and find ways to reward your employees with non-monetary items. Perhaps some downtime away from their desk doing something else, or cross training, is a possibility.

1. Avoid using your coach session as a venue to deliver \_\_\_\_\_\_\_\_\_\_.
   1. Accolades
   2. Reprimands
   3. A and B
   4. Neither A nor B

Avoid using your coach session as a venue to deliver reprimands, sanctions, bad news, etc.

1. Building trust takes \_\_\_\_\_\_\_\_\_\_\_\_.
   1. Practice
   2. Dedication
   3. A and B
   4. Neither A nor B

Building trust takes practice and dedication to being sensitive to your employee’s needs.

1. When providing constructive criticism, focus on \_\_\_\_\_\_\_\_\_\_\_\_\_.
   1. What you will say
   2. Observable behavior
   3. Specific actions of the employee
   4. B and C

When providing constructive criticism, focus on observable behaviors and actions, don’t generalize.

1. As managers, we should foster an environment of \_\_\_\_\_\_\_\_\_.
   1. Working
   2. Discipline
   3. Learning
   4. None of the above

As managers, we should foster an environment of learning.

1. If not enough time is left to accomplish the goal by the goal date, then \_\_\_\_\_\_\_.
   1. Start over
   2. Set a new goal
   3. A and B
   4. Neither A nor B

If not enough time is left to accomplish the goal by the goal date, then set a new goal and goal date based on how much improvement has been accomplished and the time it took to get there.

1. The root of obstacles typically comes from a personal deficiency in their life situation.
   1. True
   2. False

The root of the obstacles typically comes from a personal deficiency in their life situation. Maslow’s theory of needs outlines basic needs we all must have in order to reach higher order needs.

1. You want to ensure that you and your employee are \_\_\_\_\_\_\_\_\_.
   1. Compatible
   2. On the same page
   3. Meeting weekly
   4. None of the above

You want to ensure that you and your employee are on the same page.

1. Failure to transition may frustrate the employee over time.
   1. True
   2. False

True: Failure to transition may frustrate the employee over time. Transitioning closes one door and opens the next.

1. The Coach is an expert on the coaching topic.
   1. True
   2. False

The Coach does not necessarily have to be an expert on the coaching topic.

1. \_\_\_\_\_\_\_\_\_ is used as a guide to questioning the protégé on which development path they want seek.
   1. Coaching
   2. Mentoring
   3. GROW
   4. None of the above

In mentoring, the GROW model is used as a guide to questioning the protégé on which development path they want seek.

## Recommended Reading

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