REPRODUCIBLE TRAINING LIBRARY
Customizable Soft-Skills Courseware

Coaching Conversations

PREVIEW

Instructor Guide

Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SMEs)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- **Learning objectives** provide effective tools for managing, monitoring, and evaluating training
- **Meaningful connections** between the topic and students' past, present, and future
- **Appropriate organization** of essential ideas helps students to focus on what they need to know in order to learn
- **Modeling techniques** demonstrate useful behaviors and problem-solving skills
- **Active application**, the cornerstone to learning, helps students immediately apply what they have learned to a real-life situation
- **Consistent** instructions and design help students learn and retain new information
- **Accelerated learning techniques** create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course to appeal to all learning styles and ensure that the ideas and information will be retained.

Contents

Introduction: Coaching skills can be applied to a variety of situations. The most common situations involve the "big picture" view of identifying a satisfying life path and the narrower view of improving performance in specific areas.

This course reviews some of those basic situations and then expands upon them to give participants a chance to practice applying the skills in different situations.

The focus of this course is on establishing the context of a situation, then allowing the participants a chance to practice or evaluate a portion of a coaching session.

Course objectives
- Identify the four steps of a coaching session and how they are applied in various contexts
- Recognize the correct application of inquiry and advocacy in a coaching session
- Apply basic coaching techniques to coaching for:
  - Performance improvement
  - Career development
  - Training for specific skills
  - Coaching a business team

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After introducing these concepts, review the learning objectives of this course.

Course objectives

Successful completion of this course will increase your knowledge and ability to:

◊ Identify the four steps of a coaching session and how they are applied in various contexts

◊ Recognize the correct application of inquiry and advocacy in a coaching session

◊ Apply basic coaching techniques to coaching for:

  o Performance improvement

  o Career development

  o Training for specific skills

  o Coaching a business team

Context: Coaching for Performance Improvement

Set the stage

◊ Schedule a meeting to conduct a performance conversation

    o Name the objective: To help the employee improve and become or stay successful

Define the opportunity or problem

◊ Focus on actual behavior

    o Gain agreement on what the behavior has been

◊ Compare the behavior to what is expected

    o Identify areas of strength and areas for improvement

◊ Encourage the individual to think through the actions that lead to this behavior

◊ Ask, "What is preventing you from doing the things we've talked about?"

◊ Ask the individual, "What can you do to improve or ensure that you are doing the right thing?"

Analyze the options

◊ List the options

◊ Discuss the pros and cons of each

◊ Identify the best options

We are leading up to our first coaching conversation. It will involve coaching for performance improvement.

Here is an illustration of how the four steps of a coaching session are adapted to performance improvement.

This description addresses an individual with a performance problem, but the same approach can be applied to a situation where an individual wants to improve on already good performance to make it even better.
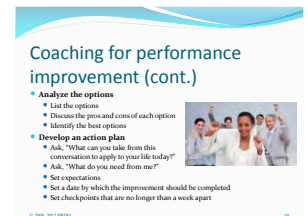
The fourth step appears on the following page.

Conversation: Define the Opportunity or Problem

Situation: The employee is always the last to adopt and integrate a new procedure into her workflow. This consistently results in errors immediately after a new procedure is implemented.

Most recent incident: The employee failed to use the new cover sheet when distributing TPS reports. (The new cover sheet has a new distribution list and highlights four key results in the report. Several vice presidents did not get the report, and those who received it had to dig through the report to find the key information.)

Upcoming change to procedures: The due date for report distribution is moving from Friday at 4:00 pm to Friday at noon. You are concerned that the report may not go out on time.

Coaching Conversation: The stage has already been set. We pick up the conversation at the "define the opportunity or problem" phase.

A volunteer participant, using inquiry and advocacy techniques, must identify the unacceptable behavior and help the employee understand how the behavior happens.

The rest of the participants should use a scorecard to note instances of inquiry and advocacy, to identify positive aspects of the conversation, and where the coach could have done better.

Coaching Scorecard					
Inquiry skill	**Frequency of use**				**Notes**
Probing	1	2	3	4	
Confirming	1	2	3	4	
Acknowledging	1	2	3	4	
Encouraging	1	2	3	4	
Advocacy skill	**Frequency of use**				
Expressing clearly	1	2	3	4	
Using "I" language	1	2	3	4	
Seeking questions	1	2	3	4	
Building	1	2	3	4	

.

Instructor notes for role play:

Initial response: The vice presidents are lazy. The information is on the first two pages. I don't really see the need for the new cover sheet.

Roots of behavior: I'm better than this job. I'm being wasted in this position. I can't be bothered with these small details, but I want to move ahead.

Scorecards: Direct participants to their workbooks.

Debrief this phase of the conversation before continuing.

Suggestions for Handling Conversations Differently:

If a "coach" is having difficulty, that participant or you can ask for a volunteer to step in. You can refer to it as "tag-team coaching," generally not available in real life, but quite useful in the classroom.

Repeating a conversation with a different coach using what he or she learned from observing the first conversation can be a valuable teaching tool.

Use these variations when appropriate.

Module **Two**

COACHING FOR CAREER DEVELOPMENT

Context: Finding Energy, Joy, and Passion

Questions to ask to help find energy, joy, and passion:

◊ Are you truly happy?

o If not, what is wrong with your life?

◊ Think about a time when you were truly happy. What was the cause of that happiness?

o What were you doing then that is now missing from your life?

◊ What will make you happy now?

o Does gaining happiness require you to step out of your "comfort zone"?

o What is the worst that could happen if you took action to pursue that happiness?

◊ What makes you smile?

◊ What do you find easy to do?

◊ What would you do for free?

◊ What do you like to talk about?

Background: Careers that align with an individual's energy, joy, and passions are the most dynamic. These careers answer an individual's "calling."

In the absence of this alignment, people come into conflict with themselves and do not work to their optimum capabilities.

Individuals often need assistance to connect with their "callings."..

When people are connected to their "callings," they can find the motivation to stretch beyond previously self-imposed limits, and the energy to achieve at unprecedented levels.

Finding energy, joy, and passion
- Are you truly happy?
- What makes you happy?
- What would make you happy now?
- What makes you smile?
- What do you find easy to do?
- What would you do for free?
- What do you like to talk about?

Here is a starting point, listing types of questions that can be asked to guide an individual in determining his or her passion. Remember not to treat this list as a checklist. A coach needs to respond to the individual's needs and base each question on the information that the individual has already shared.

Coaching to learn specific skills
- Identify the specific skill
- Identify the employee's level of comfort and current skill level
- Explore the specific areas that need to be learned or improved
- Brainstorm with the employee
- Embrace all of the ideas

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Coaching to learn specific skills (cont.)
- Develop an action plan
- Practice the new task
- Provide feedback
- Repeat for each additional task

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Context: Implementing the Steps to Effective Coaching

Recall the four steps of a coaching session:

◊ Set the stage

◊ Define the opportunity or problem

◊ Analyze options

◊ Develop an action plan

The ongoing coaching process also includes:

◊ Continuous Evaluation

◊ Providing feedback

Coaching to learn specific skills:

◊ Identify the specific skill, broken down to the smallest task.

◊ Identify the employee's level of comfort and current skill level with performing this task.

◊ Explore the specific areas that need to be learned or improved.

◊ Brainstorm with the employee regarding how these areas could be addressed.

◊ Embrace all of the ideas that come from the brainstorming session.

◊ Develop an action plan to implement these ideas.

◊ Practice the new task.

◊ Provide feedback.

◊ Repeat for each additional task.

Conversation: Brainstorming Around a Task

Situation: The employee is a customer service representative who has a tendency to match emotions with irate callers. The employee realizes that this is a problem and has sought coaching help.

Most recent incident: An angry man used profanity during a call and the employee hung up on the caller without saying a word.

Coaching Conversation: The stage has already been set. The problem has been defined as the employee's difficulty in refraining from matching callers' emotions. The employee's comfort level and skill level are below expectations.

A volunteer participant acting as the coach must use inquiry and advocacy techniques to explore the areas that need improvement, with the facilitator acting as the employee.

After determining areas for improvement, the coach leads a brainstorming session to help the participant identify how these areas can be improved.

The rest of the participants should use a scorecard to note instances of inquiry and advocacy, to identify positive aspects of the conversation, and where the coach could have done better.

Here is a chance for participants to coach a brainstorming session around a specific task. In this example, the task is conducting a conversation with a customer without matching the customer's negative emotions.

Instructor notes for role play:

Part 1 – Areas for improvement

When exploring the areas that need to be improved, the volunteer's responses to the coach's questions ultimately reveal that:

You match emotions: getting sad when the caller is sad, but more importantly getting angry when the caller is angry, and giving any verbal abuse right back to the caller. You realize that this gets in the way of your job performance.

Part 2 – Brainstorming session:

- Possible brainstorming ideas: Post a reminder to smile while talking.
- Place a mirror so that you can see your face when on the phone.
- Pin up a picture of your grandmother to remind you how you would like someone to respond to her.

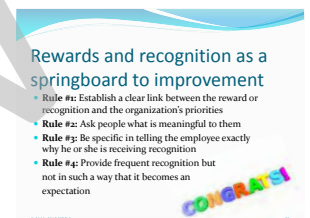# Conversation: Rewards and Recognition as a Springboard to Improvement

◊ **Rule #1:** Establish a clear link between what people are rewarded for and the organization's priorities.

- o Priority: Reduce absenteeism. Reward: Employees who have perfect attendance for the month receive a handwritten certificate of recognition, and their names go into a monthly drawing for a gift certificate.

◊ **Rule #2:** Ask the people you want to reward what is meaningful to them.

- o Public versus private praise
- o Tangible items versus intangible opportunities

◊ **Rule #3:** Be specific in telling the employee exactly why he or she is being rewarded or receiving recognition.

- o Less effective: "Nice job on the Evans Project."
- o More effective: "The customer loved the organization of the report and has requested that we produce others for them."

◊ **Rule #4:** Provide frequent recognition, but not with such sameness or consistency that it becomes an expectation.

Coaching Conversation: Two volunteers play the roles of employee and coach. The coach determines what type of reward is meaningful to the employee. Then the coach communicates an appropriate reward to the employee, following the guidelines of Rule #3.

The rest of the participants should provide feedback on what the coach did well and how the interaction could have been improved.

Ideally, employees should see a connection between meeting or exceeding their personal goals, and the organization's priorities and success.

A study of incentive plans in 144 U.S. companies by consulting firm Towers Perrin concluded that plans with the highest levels of effectiveness also have the highest levels of employee involvement.

Rewards and recognition as a springboard to improvement
- Rule #1: Establish a clear link between the reward or recognition and the organization's priorities
- Rule #2: Ask people what is meaningful to them
- Rule #3: Be specific in telling the employee exactly why he or she is receiving recognition
- Rule #4: Provide frequent recognition but not in such a way that it becomes an expectation

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CONGRATS!

Recognition should be given as close to the event or behavior as possible.

When recognition becomes an expectation or entitlement, it loses its effectiveness because it no longer makes the employee feel special. An example: A department manager provided lunch for her staff on Fridays to encourage team building and positive work relationships. All interested employees voluntarily attended the lunches. She was shocked when a group of employees asked to be reimbursed to cover the cost of the lunch on days they did not attend. The lunches had become an expected portion of their compensation and benefits. Sincere recognition had turned into entitlement.

Debrief after the conversation.

Course review

1. List the four steps of a coaching session.
    _____
    _____
    _____
    _____

2. Fill in the blanks. When coaching for performance improvement and defining the opportunity or problem, you should focus on _____, and compare the _____ to what is _____.

3. When a coach helps people find their passion and explore areas within their organization where they can test and embrace it, what steps of the coaching session are being addressed?

    _____

4. Which of the following questions or statements are examples of inquiry skills? Select all that apply.

    a. Describe for me exactly what happened.

    b. What do you think about what I've just said?

    c. Tell me if I understand this correctly.

    d. I get the feeling that this is more than you think you can handle.

5. "I have observed that the TPS reports have gone out with the wrong coversheet for the last two Fridays" is an example of which advocacy skill?

    _____

6. In coaching for performance improvement, what is involved in setting the stage? Select all that apply.

    a. Scheduling a meeting to discuss performance

    b. Determining the objective, which might be to help the employee improve and become successful

    c. Encouraging the individual to think through what might be causing negative behaviors

    d. Define specific steps with definite time frames for completion

1. Set the stage, define the opportunity or problem, analyze options, and develop an action plan.

2. When coaching for performance improvement and defining the opportunity or problem, you should focus on **actual behaviors**, and compare the **behavior** to what is **expected**.

3. Analyze options and develop an action plan.

4. The correct answers, **a**, **c**, and **d** are examples of the inquiry skills of probing, confirming and acknowledging while **b** is an example of the advocacy skill of seeking.

5. Using "I" language.

6. **a** and **b**

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