Coaching Course 3

We want to extend a warm greeting to each of you and welcome you back to the third installment of this coaching training series. In course 1 we learned about coaching and what it is and how it compares to mentoring and managing. In course 2 we discussed what effective coaches do with their employees. We discussed positive work relationships built on trust and rapport. We dived into the effective communication techniques, and talked about the elements of an effective coaching session. We had an opportunity to discuss with each other all along the way, sharing ideas, tips, and successful strategies and ideas. Each of these two courses has prepared us for today. Today is designed to have fun practicing everything we discussed thus far.

In course 1 we talked about the purpose of coaching and how powerful it can be with our teams. For many of us today may be a bit uncomfortable. Uncomfortable because we are going to ask you to step outside your comfort zones for a brief moment. The purpose of today and in fact this entire training series is about skill development and enhancement. We want you to practice, practice, and when you are sick of practice, more practice. After all, championships are only won after a team has fully committed to learning the game plan, technique, and strategy in practice. When it's game time, we are able to rely on muscle memory from the repetition of these exercises.

Please have fun today. Please continue sharing what has worked for you and where you tried something that didn't go so well. Don't be afraid to put yourself out there and goof up. Goofing up and making mistakes is the purpose of practice. There is a promise inherent in practicing, and that is if we do it well, and often, we will have eventual success. Opportunity is where practice and preparation meet. You have our permission to make mistakes today.

Let's take a moment and review we've been, so we have an idea where we are going today.

---------Courses 1, 2 Follow Up & Review---------

Discussion: Facilitate a discussion with participants on what they remember from courses 1 and 2.

- *How do they define coaching? What is it and what is it not?*
- *What do participants remember from course 2?*

Quiz: During course 1 participants categorized their daily tasks into three areas: Coaching, Mentoring, and Managing. During this activity the activities were captured by the workgroup. The facilitator will receive a copy of the activities and will quiz participants.

Follow-up on Skill Building Activity – "Putting Coaching into Action"

At the conclusion of course 2 we asked each of you to participate in a skill building activity by practicing what you learned in course 2 with your team. Included in the handout provided to you were several questions for you to reflect upon. Please gather into your small groups and discuss the activity. Now that you've had an opportunity to discuss in your small groups, is there a volunteer or two willing to share with the group?

We have endeavored to integrate practice situations you face on a daily basis into the role playing activities today. We recognize you may be currently facing similar or different situations on your team. In your activities today please feel free to modify the scenario as you deem appropriate.

---------Coaching Process---------

We'd like to kick the day off by returning to the coaching steps we discussed in course 2. In course 2 we talked about Informal and Formal coaching and identified when each style may be used. As we go throughout the day practicing what we learned in courses 1 and 2, the scenarios you will see today will fall specifically into the informal style.

To refresh your memory, Informal coaching is day to day interactions with your employees. They are commonly done when a supervisor identifies where an employee may improve in a specific area, or a customer interaction that could have gone better. It is a focused conversation with the employee in their cubicle or yours.

As we review each of the scenarios and practice, be mindful of the coaching process and let the steps guide your conversation. Let's review together the coaching steps:

Review the Goals & Expectations: The first step in the skill development process is to review the current performance goals or expectations. Put simply, does the employee understand what is expected from them?

Assess the Performance: In informal coaching this is quickly accomplished by the observation of the supervisor. For example, a supervisor can quickly assess an employee's performance by listening in on a conversation or phone call, or by statements made by the customer.

Provide Feedback & Guidance: In this step the supervisor has an opportunity to discuss with the employee their individual performance in a specific area. The objective of the coach is to get the employee to self-identify their strengths and weaknesses and formulate their own action plan. For example, an interaction between a customer and an employment counselor didn't go so well. Through a series of questions a supervisor may help the employee review the interaction with the customer and identify where improvements can be made.

Establish an Action Plan: Successful coaches are able to engage their employees in developing an action plan that contains the following elements: Specific goal, Steps to achieving the goal, how to measure progress, resources and support needed, and target dates. In Informal Coaching, these steps do not necessarily need to be written down; although it may be helpful to write it down. An example of this is when a supervisor observes a meeting between a supervisor and employment counselor. The customer comes into the office visibly overwhelmed and on the verge of tears. She shares her frustrations and concerns with her employment counselor. Unfortunately, her concerns are not validated. The customer leaves the meeting feeling even more frustrated than before. The supervisor assists the employment counselor in identifying a goal to practice active listening and reading non-verbal cues with the next customer. They explore ways in which they can achieve the goal and agree that the supervisor will observe the next appointment.

Follow-Up & Measure Progress: The next step in the skill development process is to follow up and measure progress. This step is crucial in the process. It is an opportunity for the supervisor to

demonstrate their commitment to the employee and their growth. Using the example from Establishing an Action Plan, following the next appointment with a customer, the supervisor sits down with the employment counselor and they discuss what went well and areas for additional growth. If necessary, the process is repeated.

---------Asking Questions---------

As we discussed in course 2, open-ended questions are a great way to start a conversation and to keep it going. Open-ended questions encourage deeper conversations and provide an opportunity for self-reflection. They allow us to gather more information. After asking an open-ended questions, we may need to wait quietly and allow the employee to think about their answer.

The right open-ended question can help guide a conversation. In some cases, asking an open-ended question can help you get more information and know how to proceed.

<u>Characteristics of an open-ended question:</u>

- Requires more than a “yes” or a “no” answer
- Requires more than a short answer, such as a specific fact or number
- Often start with “What…” “How…” “Who…” “Where/when…”
- May take the employee a few second to think about their answer
- There are no right or wrong answers
- Comes from a place of curiosity, rather than judgement – with no expectation about what is the correct or the best answer

Examples Comparing Close-Ended and Open-Ended Questions

Closed – Your last conversation with your customer seemed to go well.
Open – How did you feel your last conversation with Angela go?

Closed – Did you return your customer's phone call yet?
Open – How did you conversation go with John?

Important Elements of Asking Questions –

- Silence is golden – Employees may take a little longer to answer open-ended questions. It may take several moments for them to formulate their answer before they respond. This is normal, and silence after a question likely signals the employee is thinking about their response. If the employee is taking too long, check for understanding, offer to rephrase the question, or provide an example, if appropriate.
- Follow-Up Listening – After asking a question, remember to actively listen to the participant's response. Because of time constraints, we often feel rushed and are already thinking of our next question while the participant is answering. Remember back to Course 2 where we discovered our brains think 1,000 to 3,000 words per minute. Giving employees our full attention is a sign of respect and may help them share more open and honest information. Listening carefully to the employee's response will often guide your next response or question.
- Follow Up for More Information – When asked a question, employees will frequently give a short or partial response initially. Follow up a brief response with additional open-ended questions.
- Ask Why…Get a Lie – Although not intended, beginning a questions with the word "why" will sometimes be taken by employees to imply judgement. This may lead some to give an answer they think you want to hear or the 'right" answer. Instead, try asking questions that begin with "how" or "what."

Activity: Part 1. We are going to play a game you have likely played before. In a moment we are going to place a piece of paper on your back. On the piece of paper there will be written the name of a person, either real life or fictional. You'll need to find out who your person is by asking only questions that can be answered with a "yes" or "no," such as, "Am I a woman?" "Am I famous?" etc. Participants will circulate around the room with the written names on their backs. They need to discover who they "are" by asking only "yes" or "no" questions. After everyone has figured out their person or when 10 minutes is up, bring the group back together and process with the following questions:

- *How easy or difficult was it to discover who you were?*
- *What made it difficult?*
- *How did you feel while doing this activity?*

Part 2 of the activity – Using the same idea behind the activity, place a new name on the participants' backs and have them again circulate with each other. This time you should only ask questions that are open-ended to find out who you are. If someone asks you a "yes" or "no" question, do not answer them.

After time is up or everyone has discovered who they are this time, bring the group back and process the following questions:

- *How was this time different from the last time?*
- *What made it easier?*
- *What made it harder?*
- *How many people found themselves asking closed-ended questions?*
- *How does this activity relate to coaching employees?*

<u>Activity</u> – Using a list of scenarios participants will practice forming open-ended questions. Divide participants into small groups. Allow them time to read through the scenario. Each group will create a list of questions they would ask the counselor in each scenario based on Who, How, What, Where/When, and descriptor questions. After each group has had a chance to pick three of the scenarios, ask each group to pick one of the scenarios and be prepared to discuss with the entire group.

Scenarios

1. *You observe an appointment between the employment counselor and a customer. The customer appeared to be visibly upset during the appointment. After a few minutes they abruptly get up and leave the office.*
2. *A group of employment counselors are in the lunch room discussing their customers. The conversation changes into one of the employment counselors talking negatively of their customer. A Work Success participant is present in the lunch room.*
3. *During an appointment with a customer the employment counselor's phone rings. They stop their conversation with the counselor at their desk and begin discussing the situation of the customer on the phone. The conversation lasts 20 minutes.*

---------Active Listening---------

Listening is a valuable skill to effective coaching. It requires focus and attention. As managers and supervisors we are constantly communicating. We send emails and instant messages, we staff cases, and we conduct team meetings. One of the potential obstacles to active listening is our minds. In course 2 we shared a statistic with you about listening – we listen at a rate of 125-250 words per minute, but think at a rate of 1000-3000 words per minute. In course 2 we shared strategies that will help us listen more fully to our employees. A few of these strategies include: preparing yourself to listen; focusing on the speaker; and avoiding interruptions.

We'd like to demonstrate active listening in a fun way by participating in an activity.

<u>Activity</u> – Participants will divide into small groups of 3. One person will be the speaker, one person will demonstrate active listening, and one person will act as the observer. The person who is doing the talking will sit with their back to the front of

the room. The person doing the listening will sit so they are facing the front of the room. The person observing should sit in a position to observe both individuals. The person doing the talking will share a story with the person listening. They may choose their own story (favorite movie, a hobby they enjoy, a favorite book, what they did over the weekend, what they have planned for the holidays). During the conversation the presenter will display a cue card to the person listening. The person listening will demonstrate the activity displayed on the card. After a few rotations members of the group will switch roles.

---------Coaches Motivate and Inspire by Giving Praise---------

When it comes to motivating employees, offering praise and recognition for a job well done can be extremely powerful. It's no secret that being praised often makes people feel good. Pride, pleasure and increased feelings of self-esteem are all common reactions to being paid a compliment or receiving positive feedback

These positive effects are relatively short lived, and for praise to have an enduring impact on employee engagement, it needs to be offered regularly. Psychologists and researchers have long been fascinated by the effects of praise on workplace performance and behavior. In 2004 the Gallup Organization conducted a worldwide research project, surveying more than four million employees about the importance of praise and recognition. Gallup concluded that employees who receive regular praise are more productive, engaged and more likely to stay with their organization.

There is little doubt that praising and recognizing the efforts and achievements of others can bring about some very positive results in the workplace. Being praised makes the recipient feel good about themselves and this can help to boost their performance. Praise provides the kind of positive experience or uplift that can increase employee morale, motivation, and engagement. But it must be delivered effectively.

Here are some tips to consider on how to PRAISE your employees:

Personal – Who are you giving this to?; What are their interests?
Relevant – What are you recognizing?; Is there some unique recognition opportunity?
Appreciated – What kind of recognition does the individual or group value? Ask them how they are best motivated. Go out of your way
Informed – Know what happened and who should be recognized. Be timely. Reward employees as soon as possible after the desired behavior or achievement
Sincere – Only say what you mean. Communicate specifically: the attitude and behaviors. Don't fake it
Expressed – Be sure to express your appreciation even if it may appear obvious

Let's practice opportunities to recognize our employees for the great things they do and offer them meaningful praise.

<u>Activity</u>: Using a list of scenarios, participants will practice offering recognition and praise to employees. Divide participants into small groups. Allow them time to read through the scenarios. Each group will discuss how they can offer recognition and praise in each of the scenarios. After each group has had a chance to pick

three of the scenarios, ask each group to pick one of the scenarios and be prepared to discuss with the entire group.

Scenarios:

1. *Sally's customer leaves you a message expressing her appreciation for Sally and her hard work in assisting the customer in returning to work. She is highly complementary of Sally and wanted you to know.*
2. *Dale's customer comes into the office visibly upset about something. You observe that Dale is able to effectively address the customer's concerns and frustrations. By the time the customer leaves the office they are appear satisfied and content.*
3. *Judy has been participating in a state-wide workgroup for the past several months. The workgroup was successful in meeting its goals. Judy was successful in balancing her workload and the demands of this workgroup.*

Thus far today we've had an opportunity to practice asking open-ended questions, active listening, and recognizing and giving praise to our employees. These scenarios has prepared us to dive deeper into the coaching process and practice with specific scenarios.

<u>Activity:</u> Using a list of scenarios, participants will practice with the coaching steps. Divide participants into groups of three. Allow them time to read through the scenarios. One participant will play the role of the employment counselor and another person will play the role of the supervisor. One person will act as the observer. For each new scenario the roles should change. The person acting in the supervisor role should attempt to engage the employment counselor in the coaching steps as well as demonstrate asking open-ended questions, active listening, non-verbal cues, and recognizing and praising positive areas. At the end of each scenario engage the entire group on how the role playing went. Which questions did they ask the employee? Did the supervisor use each step of the coaching process? Was it challenging?

Demonstration Scenario:

Sharene comes in for her appointment with her employment counselor, Jackie. The appointment seems to be going well up to the point where Jackie receives a phone call. She interrupts Sharene to answer the phone. It seems Jackie is speaking with another customer. The phone conversation lasts approximately 15 minutes. In the meantime Sharene sits quietly, looking around the office.

Hi Jackie. Do you have a free minute I can speak to you about an observation I made during your appointment with Sharene?

Sharene appeared to be engaged and talkative with you during her appointment. She was paying attention to you while you were offering her advice on how to improve her job searching efforts and seemed enthusiastic to try out the tips you had shared with her. It appeared the appointment was going well up until you answered your phone when it rang. I'm curious about the reason you answered

the phone during the appointment? It seemed as though Sharene disengaged with you after that phone conversation. How do you think Sharene felt as she sat there waiting while you were talking with your other customer? (Assess the Performance, and Provide Feedback)

Being accessible to all of your customers is important. What are some ways you can ensure you are accessible to your customers while still giving your full attention to the person sitting in front of you? What can you do to make sure you aren't tempted to answer the phone in non-emergency situations? (Review Expectations, Establish Action Plan)

I think your ideas are great and appear as though they will help you be successful in being accessible to all your customers while demonstrating the person in front of you is the most important. How do you think we can measure your progress in this area? When would you like me to follow up with you to see how your goal is coming along? (Follow Up)

Scenarios:

- Jessica came in for her appointment with Fred, her employment counselor. Jessica is currently struggling with several concerns, such as the lack of quality child care, transportation, and a stable living arrangement. In addition to these concerns she received a call from the school principal where her 12 year old son is attending. The principal informed Jessica if her son doesn't immediately correct his behavior he will be suspended. Jessica is visibly upset during the appointment and is on the verge of tears. Fred recognizes Jessica is consumed with worry. He acknowledges she has a lot going on and is concerned for her. He then tells Jessica he has several things he wishes to discuss with her during their appointment together. He goes on to outline five new things he wants to add to Jessica's employment plan. By the time Jessica leaves the office she is noticeably crying.
- Sarah recently applied for FEP. She was referred to an employment counselor as part of the eligibility requirements for financial assistance. Sarah comes into the office for the first time and bring her three small children. During her first meeting with Kristie, her new employment counselor, her three young children are very active and boisterous. Sarah appears distracted and upset at times. The appointment is running longer than anticipated due to her children's behavior. Finally Kristie tells Sarah she must conclude the appointment "because they can't get anything done with her children present." Sarah is asked to return next week and not bring her children with her. If she brings her children the appointment will have to be rescheduled.
- John is in the office today for his second appointment with Trudy. The goal for the appointment is to create the employment plan. During the appointment you observe Trudy with her back to John, typing away at her

computer. Once in a while Trudy will turn around in her chair to ask John a question or two. Except for these brief interactions, there doesn't appear to be a lot of dialogue between Trudy and John. Towards the end of the appointment Trudy proclaims the employment plan has been developed and asks John to add his signature that he agrees to participate in the activities. John appears confused and hesitant to sign the plan, but does so at the insistence of Trudy. Trudy hands John a copy of the employment plan, wishes him luck, and sends him on his way.

You may be wondering why we only talked about certain scenarios and did not concentrate our time on coaching performance issues. The answer has two reasons. The first is due to the upcoming trainings in the spring. Emphasis will be placed in developing skill building activities for you and your counselors. For you the activities will be in context of how to coach your employees to learn MI principles, for example. The second reason is the practice element (?)

---------Conclusion and Presentation of Whistle---------

We express our appreciation to each of you for your willingness to go outside of your comfort zones during our time together. So what's next? We want you to return to your office's knowing this is only the beginning. We want you to practice your coaching skills each and every day. We want you to call each other up when you're faced with a situation you're unsure how to handle and get expert advice. We want you to feel safe in practicing what you've learned, knowing you will get better and better. Practice is the key to skill development and confidence. Practice makes champions!

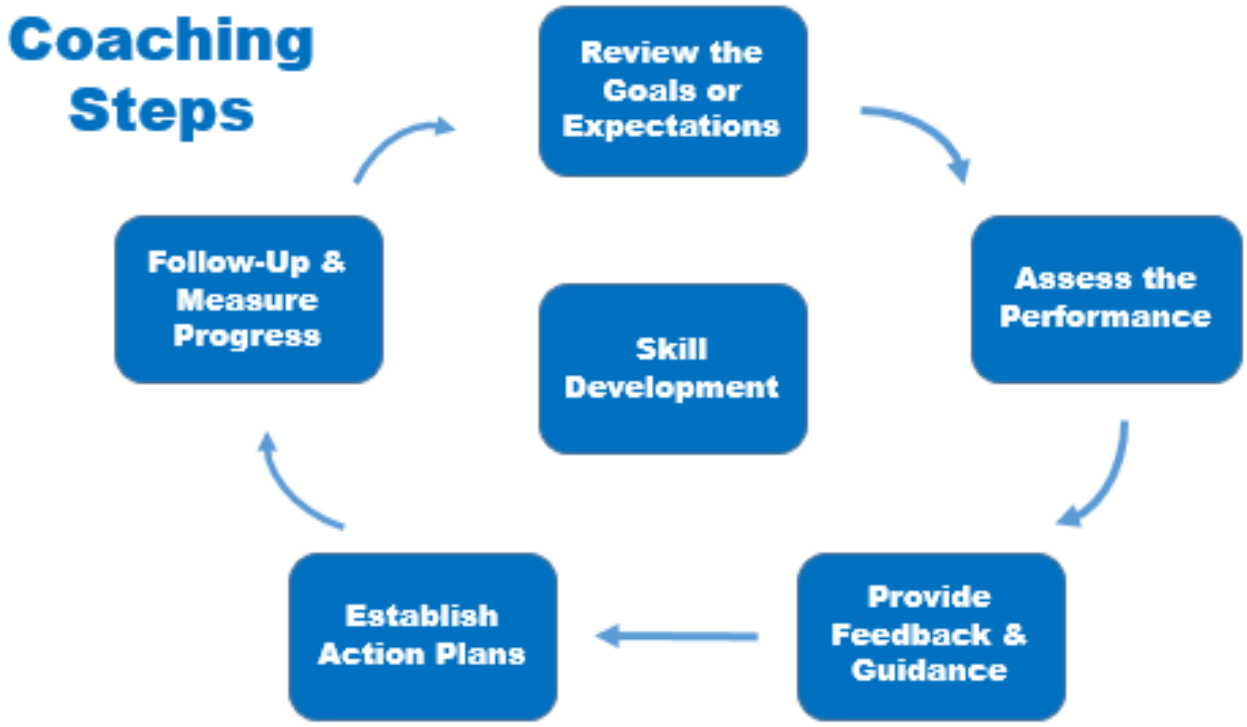
We have a take away assignment for you. We ask that you identify a specific goal related to coaching you want to work on as soon as you return to your offices. We want you to write down your one goal. Next capture the steps needed to accomplish your goal. After you've done that brainstorm ways in which you can measure your progress towards achieving that goal. List out the resources and support you need and finally, identify a target date. Once you've done that, we ask that you share your goal with your supervisor and enlist their support.

Our final activity will include the presentation of your Coaching Whistle. If you will all gather together in a circle at the front of the room.

> Activity: After the participants have gathered in a large circle, ask each participant to share with the group one thing they learned over the three courses and their goal when they return to their offices. After they shared, present them with the Coaches Whistle!

Let's Coach!

Coaching Steps



Review the Goals & Expectations: The first step in the skill development process is to review the current performance goals or expectations. Put simply, does the employee understand what is expected from them?

Assess the Performance: In informal coaching this is quickly accomplished by the observation of the supervisor. For example, a supervisor can quickly assess an employee's performance by listening in on a conversation or phone call, or by statements made by the customer.

Provide Feedback & Guidance: In this step the supervisor has an opportunity to discuss with the employee their individual performance in a specific area. The objective of the coach is to get the employee to self-identify their strengths and weaknesses and formulate their own action plan. For example, an interaction between a customer and an employment counselor didn't go so well. Through a series of questions a supervisor may help the employee review the interaction with the customer and identify where improvements can be made.

Establish an Action Plan: Successful coaches are able to engage their employees in developing an action plan that contains the following elements: Specific goal, Steps to achieving the goal, how to measure progress, resources and support needed, and target dates. In Informal Coaching, these steps do not necessarily need to be written down; although it may be helpful to write it down. An example of this is when a supervisor observes a meeting between a supervisor and

employment counselor. The customer comes into the office visibly overwhelmed and on the verge of tears. She shares her frustrations and concerns with her employment counselor. Unfortunately, her concerns are not validated. The customer leaves the meeting feeling even more frustrated than before. The supervisor assists the employment counselor in identifying a goal to practice active listening and reading non-verbal cues with the next customer. They explore ways in which they can achieve the goal and agree that the supervisor will observe the next appointment.

Follow-Up & Measure Progress: The next step in the skill development process is to follow up and measure progress. This step is crucial in the process. It is an opportunity for the supervisor to demonstrate their commitment to the employee and their growth. Using the example from Establishing an Action Plan, following the next appointment with a customer, the supervisor sits down with the employment counselor and they discuss what went well and areas for additional growth. If necessary, the process is repeated.

Rock Climbing Analogy

Climbing takes time, discipline and hard work. With correct planning and preparation, it can be an exhilarating adventure with spectacular views. We are able to climb safely as well as keep those in your team safe as we make sure knots are tied correctly, gear is in good shape and anchors are secure. Each step we take will lead us to our end goal and we support and anchor each other along the way.

- **Do your research –** Before you start out, learn as much as you can about coaching, read the provided articles, enjoy the training and become knowledgeable.
- **Assess your mental strength –** Identify your own strengths, personality and coaching style. Be authentic to that, you will be more effective.
- **Get fit –** Strengthen those areas you know will make you a better coach. Don't be afraid to push yourself out of your comfort zone.
- **Acquire the gear –** Know how to safely use the tools of coaching, including active listening skills, motivational interviewing, and empathy.
- **Learn –** Complete the follow-up training to continue to improve your skills. Learn about coaching, try new things and don't be afraid to fail.
- **Plan your first climb –** Plan how you want that first interaction to go and be prepared for the unexpected.
- **Keep improving your skills and trying harder mountains to climb –** Evaluate your coaching moments and start looking for and seeking out opportunities to coach your team.
- **Find a good guide –** Know where to go to find answers to difficult coaching questions. Have a support system which will help you be a better coach.
- **Descend with plenty of time to get back safely –** Give yourself plenty of time for coaching moments as needed. Some will be short others will need more planning and follow through.
- **Begin climbing –** Incorporate coaching into your everyday interactions with your team, as well as formal one-on-ones.

Adapted from Forbes, ***Know When to Manage and When to Coach, May 1, 2012,***
http://www.forbes.com/sites/work-in-progress/2012/05/01/know-when-to-manage-and-when-to-coach/

Let's Coach!

Practice Scenarios

Scenario 1.

Jessica came in for her appointment with Fred, her employment counselor. Jessica is currently struggling with several concerns, such as the lack of quality child care, transportation, and a stable living arrangement. In addition to these concerns she received a call from the school principal where her 12 year old son is attending. The principal informed Jessica if her son doesn't immediately correct his behavior he will be suspended. Jessica is visibly upset during the appointment and is on the verge of tears. Fred recognizes Jessica is consumed with worry. He acknowledges she has a lot going on and is concerned for her. He then tells Jessica he has several things he wishes to discuss with her during their appointment together. He goes on to outline five new things he wants to add to Jessica's employment plan. By the time Jessica leaves the office she is noticeably crying.

Scenario 2.

Sarah recently applied for FEP. She was referred to an employment counselor as part of the eligibility requirements for financial assistance. Sarah comes into the office for the first time and bring her three small children. During her first meeting with Kristie, her new employment counselor, her three young children are very active and boisterous. Sarah appears distracted and upset at times. The appointment is running longer than anticipated due to her children's behavior. Finally Kristie tells Sarah she must conclude the appointment "because they can't get anything done with her children present." Sarah is asked to return next week and not bring her children with her. If she brings her children the appointment will have to be rescheduled.

Scenario 3.

John is in the office today for his second appointment with Trudy. The goal for the appointment is to create the employment plan. During the appointment you observe Trudy with her back to John, typing away at her computer. Once in a while Trudy will turn around in her chair to ask John a question or two. Except for these brief interactions, there doesn't appear to be a lot of dialogue between Trudy and John. Towards the end of the appointment Trudy proclaims the employment plan has been developed and asks John to add his signature that he agrees to participate in the activities. John appears confused and hesitant to sign the plan, but does so at the insistence of Trudy. Trudy hands John a copy of the employment plan, wishes him luck, and sends him on his way.