

# **COACHING CONVERSATIONS**



**INSTRUCTOR GUIDE**

**1/2-DAY COURSE**

**HRDQ<sup>®</sup>**

**COACHING CONVERSATIONS**

Copyright © 2008 TreeLine 2008

Published by HRDQ

2002 Renaissance Boulevard #100

King of Prussia, PA 19406

Phone: (800) 633-4533

Fax: (800) 633-3683

Web: [www.HRDQ.com](http://www.HRDQ.com)

No part of this publication may be reproduced or transmitted in any form or by any means except as permitted under HRDQ's End User License Agreement, and the 1976 United States Copyright Act (17 U.S.C.) sections 107 and/or 108. Inclusion in any publication, whether for commercial or non-commercial purposes, is prohibited. Requests for permission to reproduce or reuse this content outside the terms of the End User License Agreement should be addressed to [permissions@hrdq.com](mailto:permissions@hrdq.com) or (610) 279-2002

For additional Reproducible Program Library licenses please contact the HRDQ Client Solutions Team at (800) 633-4533

The material in this publication is provided "as is." HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

Version 1.0

Last updated November 2008

ISBN 978-1-58854-519-0

## Reproducible Program Library—End-User License Agreement

### IMPORTANT! PLEASE READ!

The following terms and conditions are a legal agreement between Organization Design & Development, Inc. DBA HRDQ (“HRDQ”) and You, Your organization, its subsidiaries, affiliates, and legal partners (“You”) regarding the Reproducible Program Library (“RPL”).

You may use the RPL only in accordance with the terms of this agreement as set forth below.

1. License Grant. HRDQ hereby grants You a non-exclusive and non-transferable license to download, reproduce, customize, and otherwise make use of the RPL within the terms of this agreement.
2. Proprietary Rights. The RPL is the sole and exclusive property of HRDQ and/or its authors including all right, title, and interest in and to the RPL. Except for the limited rights given to You herein, all rights are reserved by HRDQ.
3. Term. This Agreement is effective upon acceptance, and will remain in effect in accordance with the term of the license purchased. The specific term of this Agreement is defined on the sale invoice provided You at the time of purchase and available thereafter from HRDQ.
4. Authorized Use of Library. For the term of this license, You may:
  - (a) Store the RPL on a computer,
  - (b) Amend, edit, and change the RPL provided that all original copyright notices, and trade and service marks, remain intact and appear on this agreement and amended versions and reproductions thereof,
  - (c) Print and distribute paper copies of the RPL for educational or training activities, whether with direct employees, students, agents, or clients, and,
  - (d) Resell the RPL, in whole or in part, provided You have a current reseller agreement with HRDQ.

You may not:

- (a) Translate, reverse engineer, decompile, disassemble, or create derivative works based on the RPL,
  - (b) Include the RPL, in whole or in part, in any publication, product or service offered for sale,
  - (c) Lease or loan the RPL,
  - (d) Distribute the RPL through the means of a removable storage medium, such as CD-ROM or DVD,
  - (e) Copy or upload the RPL onto any bulletin board service or public Internet site, or,
  - (f) Sublicense or reassign this license.
5. Termination. Failure to perform in the manner required in this agreement shall cause this license to automatically terminate and HRDQ may exercise any rights it may have. Upon natural expiry of the term, unless renewed by You with HRDQ, access to the download site will be denied and all passwords rendered inactive. Upon termination, for whatever reason, You must destroy all original and amended versions of the RPL, in any and every format, and certify as such, in writing, to HRDQ upon request. All provisions of this license with regard to the protection of the proprietary rights of HRDQ shall continue in force after termination.
  6. Warranty. The RPL is provided “as is.” HRDQ warrants that the RPL does not violate any copyrights, trademarks, trade secrets, or patents of any third parties. HRDQ disclaims all other warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in the RPL. If any part of the RPL is defective in workmanship or materials, HRDQ’s sole and exclusive liability, and sole and exclusive remedy for You, shall be replacement of the defective material. HRDQ’s warranty shall survive the termination of this agreement. Some states do not allow exclusions or limitations of implied warranties or liability in certain cases, so the above exclusions and limitations may not apply to You.
  7. Permissions. Any other use of the RPL not defined in this agreement is subject to the written approval of HRDQ.

HRDQ, 2002 Renaissance Blvd. #100, King of Prussia, PA 19406, 610.279.2002, [www.hrdq.com](http://www.hrdq.com).

# 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.

# Course Timing

## Module One: Coaching for Performance Improvement

Type of Activity	Segment	Time
	Course Objectives	5
	Overview of Coaching and Conducting a Coaching Session	15
	Communication Skills and Techniques	15
	Context: Coaching for Performance Improvement	10
	Conversations: Define the Opportunity or Problem Analyze Options Develop an Action Plan	45

## Module Two: Coaching for Career Development

	Context: The Career Coaching Process	5
	Context: Finding Energy, Joy, and Passion	10
	Conversation: Finding Your Passion	15
	Conversation: Setting SMART goals	10



Reading



Written Exercise






Facilitation



Group Activity

## Course Timing (cont.)

### Module Three: Coaching for Training Specific Skills

Type of Activity	Segment	Time
	Context: Implementing the Steps to Effective Coaching	10
	Conversation: Brainstorming Around a Task	20
	Example: Coaching the Skill of Active Listening	10

### Module Four: Coaching a Business Team

	Context: What Makes for an Effective Business Team Coach?	10
	Conversation: Empowering Team Members	20
	Conversation: Rewards and Recognition as a Springboard to Improvement	15
	Summarize and Close	10



Reading



Written Exercise



Facilitation



Group Activity

# Contents

Module One: Coaching for Performance Improvement .....	1
Course Objectives .....	2
An Overview of Coaching .....	3
Context: Conducting a Coaching Session .....	4
Communication Skills: Expert Questioner .....	5
Communication Techniques: Inquiry and Advocacy .....	6
Context: Coaching for Performance Improvement .....	7
Conversation: Define the Opportunity or Problem .....	9
Conversation: Analyze Options .....	10
Conversation: Develop an Action Plan .....	11
Module Two: Coaching for Career Development .....	13
Context: The Career Coaching Process .....	14
Context: Finding Energy, Joy and Passion .....	15
Context: What Next? .....	16
Conversation: Finding Your Passion .....	17
Conversation: Setting SMART Goals .....	18
Module Three: Coaching for Training Specific Skills .....	19
Context: Implementing the Steps to Effective Coaching .....	20
Conversation: Brainstorming Around a Task .....	21
Example: Coaching the Skill of Active Listening .....	22
Module Four: Coaching a Business Team .....	23
Context: What Makes an Effective Business Team Coach? .....	24
Coaching Techniques: Empowering Team Members .....	25
Conversation: Rewards and Recognition as a Springboard to Improvement .....	27
Summary and Close .....	28

Appendix .....	29
Action plan.....	30
Course review.....	31
Suggested resource list.....	33
Course evaluation .....	34
Solutions for every training challenge .....	36

## Module One



# ***COACHING FOR PERFORMANCE IMPROVEMENT***

**Note to Instructor:** This course is designed to build upon the concepts learned in *The Art of Successful Coaching*. If participants have completed that course, the discussion of coaching techniques and tools can be covered as a review and more time can be spent on the conversations, allowing more than one student to practice the skills. The course was also designed to work as a stand-alone program, in which case more time can be spent on the techniques and tools, using the conversations to demonstrate them.

**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.



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:

- Performance improvement
- Career development
- Training for specific skills
- Coaching a business team

# An Overview of Coaching

## General definition of coaching:

A method and technique that can be used to guide an individual to new learning within defined time frames

## Goals of coaching:

- Motivate and inspire individuals to do more and reach higher
- Support clients in breaking down large goals into manageable steps
- Hold individuals accountable to their commitments to quickly produce results

## Over time, a coach guides a discovery process:

- Assessing skills, personality traits, and learning styles
- Defining vision and successful outcomes
- Creating an inspiring mission statement
- Establishing annual goals with objectives to meet along the way.

**Coaching** – A method and technique that can be used for guiding an individual to new learning within defined time frames



Aspects of coaching are not standardized, but many descriptions contain common elements



Coaching is not therapy, as that leads to dependence

Coaching puts the responsibility on the individual to become more proactive in defining goals and reaching them.

**Intro:** Coaching is generally accomplished during a series of one-on-one sessions.



Setting the stage involves creating a private, non-threatening environment in which to conduct a conversation, then clearly stating the objectives of the session.

The conversation moves to defining the opportunity or problem, and gaining agreement from the individual.

By asking questions, the coach can help the individual to raise and evaluate options.

Once the individual has settled on an option to pursue, the conversation can focus on developing an action plan with specific goals, deadlines, and incremental steps to achieve the goals.

Since most coaching sessions are part of a coaching program, in the next session, participants should evaluate the individual's actions and the coach should provide feedback.

## Context: Conducting a Coaching Session

### A coaching session is a four-step process:

- Set the stage
- Define the opportunity or problem
- Analyze options
- Develop an action plan

### Ongoing coaching also includes:

- Continued Evaluation
- Providing feedback

# Communication Skills: Expert Questioner

## Coaching sessions include many questions:

Ask the right questions at the right time.

Ask questions that respond to the individual's needs (not a checklist).

Begin with non-challenging questions.

Ask thought-provoking and challenging questions after trust has developed.

Ask the questions individuals wouldn't ask themselves.

Ask questions that help individuals arrive at their own solutions.

A good coach can be described as an "expert questioner," with the ability to ask the right questions at the right time, responding to the needs of the individual being coached rather than just reading from a checklist of questions.

**Expert Questioner**

- Ask the right questions at the right time
- Respond to the needs of the individual
- Begin with non-challenging questions
- Ask challenging questions after trust has developed
- Ask questions individuals wouldn't ask themselves
- Use questions to help individuals arrive at their own solutions

© 2008 Trust-Less Training

The infographic includes a small photograph of a coach and a client sitting at a table, engaged in a conversation.

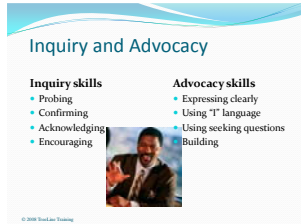
Coaches frequently ask non-challenging questions to encourage the individual to "open up" and begin a conversation.

Later, once trust has developed, coaches can ask deeper, more thought-provoking and challenging questions. These are questions that the individuals wouldn't ask themselves, which help the individuals come up with their own solutions.

When individuals arrive at their own solutions, they are better able to implement and stick to them than to solutions that others offer to them.

It is the coach's responsibility to keep the conversation moving and to achieve the desired outcomes.

Two key communication techniques used to accomplish this are inquiry and advocacy.



Inquiry skills follow a cycle of probing for information, confirming understanding, acknowledging the individual's feelings about the situation, and encouraging additional conversations.

While coaching involves many inquiry questions, advocacy questions and statements are also important.

Advocacy is how the coach interjects his or her insights into the conversation and builds upon what has been said. Asking questions can help the coach to determine the person's reaction and whether he or she "buys in" to what you are saying.

# Communication Techniques: Inquiry and Advocacy

## Inquiry skills

Probing

- "Tell me about ..."

Confirming

- "Let me see if I understand this correctly ..."

Acknowledging

- "I sense you're feeling overwhelmed by ..."

Encouraging

- "I see, please tell me more."

## Advocacy skills

Expressing clearly

- "Here's the situation we need to address."

Using "I" language

- "I have observed ..."

Using seeking questions

- "What do you think about what I've just said?"

Building

- "That's a good point. Let me also suggest that ..."

# Context: Coaching for Performance Improvement

## Set the stage

Schedule a meeting to conduct a performance conversation

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

## Define the opportunity or problem

Focus on actual behavior

- Gain agreement on what the behavior has been

Compare the behavior to what is expected

- 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.

## Develop an action plan

Ask, "What can you take from this conversation to apply to your life today?"

Ask, "What do you need from me?"

Set expectations

- "How will we know that it is working?"
- Identify improvement steps

Set a date by which the improvement should be completed

Set checkpoints which are no longer than a week apart

# 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.

Continue the discussion.

**Instructor notes for role play:**

During the conversation, the participants should come to understand that you need to succeed in the small details in order to get ahead.

Some possible solutions for the upcoming change:

You can set up a reminder on your Outlook or Lotus Notes calendar for first thing Friday morning and again for an hour before the reports are due.. (Con: an hour might not give you enough time.)

You could just force yourself to remember without relying on outside reminders, to make sure you internalize the message. (Con: while your effort is commendable, you can't risk being late.)

Do the report the day before to make sure it is done on time. (Con: all of the data may not be available by then.)

Distribute the report by 11:00 instead of noon. This will exceed expectations, which is one way to get ahead.

Debrief this phase of the conversation before continuing.

## Conversation: Analyze Options

**Situation:** Continue the previous conversation, with a new participant taking over for the coach.

**Coaching Conversation:** Using inquiry and advocacy techniques, help the employee identify options to address the behavior and then analyze the options, noting the pros and cons of each option.

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

## Conversation: Develop an Action Plan

**Situation:** Continue the previous conversation, with a new participant taking over for the coach.

**Coaching Conversation:** Using inquiry and advocacy techniques, help the employee develop an action plan based on the best option developed in the previous portion of the conversation.

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.

### A coaching session is a four-step process:

- Set the stage
- Define the opportunity or problem
- Analyze options
- Develop an action plan

Continue the conversation:

#### Instructor notes for role play:

The action plan could be a combination of the first and last ideas from the portion of the conversation on the previous page: to set a recurring reminder for every Friday morning at 7:00 and again at 10:00 to allow enough time to complete the report and distribute by 11:00, to exceed expectations.

Keep the reminder in place until getting the report out by 11:00 is just part of the Friday routine.

Debrief this phase of the conversation.

Summarize how these conversations illustrated the second, third, and fourth steps of the coaching session.








## Reproducible Training Library



## DELIVERING HIGH-QUALITY, CUSTOMIZED TRAINING HAS NEVER BEEN SIMPLER.

The Reproducible Training Library offers a full suite of training solutions, in three formats:

-  Instructor-led Classroom programs with reproducible instructor and participant guides
-  Self-study e-Learning with freely distributable self-study module in Microsoft PowerPoint© format
-  e-Books in freely distributable pocket book Microsoft Word© format

All formats can be easily customized so it's your training, your way. Why spend the time when we've done the work for you?

**Get started today!**

Download the Info Kit [hrdqstore.com/rtl-info](http://hrdqstore.com/rtl-info) or call our Customer Service Team at **800-633-4533**

### ABOUT US

HRDQ is a trusted developer of soft-skills learning solutions that help improve the performance of individuals, teams, and organizations. We offer a wide range of resources and services, from ready-to-train assessments and hands-on games to facilitator certification, custom development, and more. Our primary audience includes corporate trainers, human resource professionals, educational institutions, and independent consultants who look to us for research-based solutions to develop key skills, such as leadership, communication, coaching, and team building.

At HRDQ, we believe an experiential approach is the best catalyst for adult learning. Our unique Experiential Learning Model has been the core of what we do for more than 30 years. Combining the best of organizational learning theory and proven facilitation methods with an appreciation for adult learning styles, our philosophy initiates and inspires.

**DOWNLOADABLE,  
CUSTOMIZABLE, REPRODUCIBLE  
& AFFORDABLE**

For more information or to place an order, please call or visit us at:

**HRDQSTORE.COM | 800-633-4533**