

An Introduction To Coaching



Coaching And Skill Building

A mother wanted to encourage her daughter's interest in the piano and so took her to a local concert featuring an excellent pianist. In the entrance foyer the mother met an old friend and the two stopped to talk. The little girl was keen to see inside the hall and so wandered off, unnoticed by her mother.

The girl's mother became concerned when she entered the hall and could see no sign of her daughter. Staff were notified and an announcement was made asking the audience to look out for the little lost girl. With the concert due to start, the curtains drew aside, to reveal the little girl sitting at the great piano, focused in concentration, quietly picking out the notes of 'Twinkle Twinkle Little Star'.

The audience's amusement turned to curiosity when the pianist entered the stage, walked up to the little girl, and said "Keep playing." The pianist sat down beside her, listened for a few seconds, and whispered some more words of encouragement. He then began quietly to play a bass accompaniment, and then a few bars later reached around the little girl to add more accompaniment. At the end of the impromptu performance the audience applauded loudly as the pianist took the little girl back to her seat to be reunited with her mother. The experience was inspirational for everyone, not least the small girl.

It takes just a few moments to make somebody's day, to help someone with their own personal aims and dreams - especially someone who looks up to you for encouragement and support. This is the core of coaching. Small scale, impactful interventions that have a lasting motivational impact in the lives of our staff members.

Coaching As A Concept

Coaching is simple in concept: Show the person you are coaching what to do, then get them to do it.

The methodology you use may vary and the style, content and purpose will change, but essentially the basic coaching loop remains the same. When planning coaching, always consider this.

Coaching Staff Members

Coaching is intended to build and grow skills in staff members. To do this effectively, you must show the staff member what you want, get them to demonstrate that they can do what you want, and then reinforce this behaviours through repetition and positive reinforcement.

There are four stages of Coaching:

- The Coach articulates and/or provides a demonstration of the desired skill
- The staff member demonstrates the desired skill
- The Coach provides observational feedback
- Repeat the above steps until YOU are satisfied

The key to successful coaching is repetition.

Group Coaching 4

Coaching is not necessarily a one to one activity designed to upskill a single staff member. There will be opportunities for you to save time and resource with group coaching.

Be aware that for skill building to occur in a group, ALL members of the group need to demonstrate competency when demonstrating the skill back to you. This may take longer with more complex skills and so successive skill building is advised.

When agreeing actions post-coaching, there are two methodologies.

Staff members can write their own actions / activity plan at the end of the session, supervised by the coach. It is vital that these action plans are quality controlled by the coach and that the staff member leaves the session with appropriately crafted actions.

Coaching The Team

On a regular basis the business makes a small change to process or methodology that means staff need to change what they do. This is a perfect opportunity to coach the group to ensure the new action has embedded and ensure that each team member understands and can perform the new action.

Action

Take an action or behaviour that your team needs to demonstrate, or should be demonstrating, break this down for your team, show them or illustrate how this can be done and then have them repeat this back to you. Repeat until the behaviour is consistent across the team



Successive Skill Building

Some skills that you may want to develop are too complex or contain too many elements to effectively coach as a single session. In this instance successive skill building will be required.

Break the behaviour/ activity down into small skills that can be worked on individually and coach these one after another either in a single session and/or over time.

For example, Objection Handling as a skill contains elements of rapport building, empathy, product knowledge etc. We would not expect a single coaching session to improve all of the above and so we can break these down into individual sessions and gradually improve performance.

Additionally in breaking down a complex action or behaviour, you may find that only specific aspects of this skill needs improvement. During observations you will have recognised skill gaps with staff members. Break these larger skills down into smaller actions, and start to plan how an staff member would perform these actions with support.

Quick Wins

Quick wins are useful when the motivation of staff is key. With top performers, Quick Wins serve to keep them on their toes and top of the class by highlighting tiny tweaks you would like them to implement, you know they can implement, and when implemented, evidence a quick incremental improvement.

For developing staff, quick wins are good to throw into coaching as the staff member feels motivated through knowing they have achieved a small goal. This in turn ensures receptivity when you work on more complex skills.

For teams, quick wins are good to throw into feedback or group meetings to raise the profile of a particular behaviour or action and ensure all team members are on point.

Quick wins may not need a specific coaching session. They can be done in the moment, in passing or during a feedback session.

Action

Identify a 'tweak' a small action you can quickly roll out with your team in a short session and observe easily.

Roll out your 'tweak' in a team coaching session and ensure staff can perform this action or activity. Ensure you support this action with updates and follow up with individuals, reinforcing the positives.

Pre-Positioning And Investing Time Into Coaching

Fully informing a staff member of the intent of a coaching session, the structure or framework, and the aim or goal of the session will improve receptivity to the material or guidance you're about to provide.

Lay out the framework of what you want to do with a staff member prior to a session, coaching should not come as a surprise, and in fact should be something that a staff member feels confident going in to and may even proactively approach you to organise.

Pre-positioning also covers diarising coaching sessions. At the start of the month you will already know your focus areas, who isn't performing well and who is doing ok. This means you can book out your coaching early and ensure you will get time to coach the staff member in time to improve performance for the month.

Timing is everything! Knowing that you have coaching time pre booked and that the venue is available means you are free to plan effectively without worrying.

This also means that staff are fully aware of their next steps and helps reinforce that there is a structure in place, meaning more effective coaching.

Book your weeks coaching activity in advance and communicate this to your team at the start of the week.

Professional Sports Coaching For Business



Step 1: The Coach Demonstrates

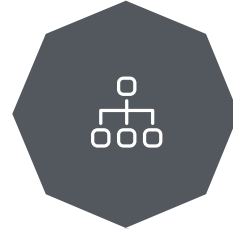


The Coach Demonstrates And Articulates

The first step of coaching is for YOU to show the staff member what you want them to actually DO. In your feedback and follow up sessions you have agreed there is a development area, so you now need to break down that development into a set of easily copied actions you can showcase.



You, the Coach, demonstrate the skill you wish the staff member to replicate



An expert role model demonstrates the skill you wish the staff member to follow



Audio/Video examples or demonstrations

Deconstruction – Or: “Did you see what I did there?”

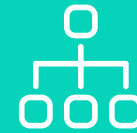
Coaches effectively transfer knowledge by deconstructing, then explaining what they have just demonstrated.

Did the staff member understand? Find out by deconstructing your skills demonstration with them collaboratively.

If you are using an expert role model or audio/video demo, pause the demonstration and explain what is happening, you don't have to play the whole thing! You have a powerful tool in recordings so make it work for you. Ask:



Can I skip to the skill demonstration?



Is the context of a whole call important?



Will the impact be clear?

Successive Approximation

Larger skills (objection Handling, for example) have multiple skills components.

Focus on micro-skills to avoid overburdening a staff member.

Allow players to gradually build skills – 1% a day is better than struggling to reach 100% immediately

Focus on quick wins for a morale boost, or prioritise key development areas for sustainable growth.



The Expert Role Model

The best expert role models are former underperformers. When they become upskilled, their visibility within the company grows. The thinking becomes “If they can do it, I can do it.”

The coach is responsible for transferring knowledge. In the event that you use an expert role model, this doesn't change. Knowledge does not move through a process of osmosis, you cannot simply sit a staff member next to a top performer and hope that best practice is passed across magically.

As a Coach you should work with the expert role model in advance. You want them to demonstrate a behaviour, so ensure they know what it is you are doing and why.

Remain present. This is your coaching session, control it. Pre-position the staff member so they know what they are looking for and why. Deconstruct and discuss the activity performed as close to the initial observation as possible.



Fail To Prepare, Prepare To Fail

If you have a 'toolkit' to pull coaching activity from, you are more likely to succeed, save time and be successful. Knowing who or where you can go for support on a range of common coaching needs is not an admission from you that you don't know something. Use the resources at your disposal!

For you to do this, it's best to know where all your tools are...

Action

Write down a list of all the possible areas of your staff member's role where they may require support. Once complete, go back over your list and consider the best resource you could muster to address this need. Would it be an expert, a trainer, a handout?



**Step 2:
Staff
Member
Demonstrates
Skill**



Demonstrating Skill

The staff member should always then practice the desired skill you have just demonstrated to them. You ask them: “Show me what you have learned”. The simplest way for them to do this is to repeat back the behaviour, dialogue or information for you to observe and/or check.

Off Broadway Technique

Plays don't make it to Broadway until they have proven themselves. They run smaller shows off-Broadway to ensure everything works. With coaching this is the same principle, we want our staff to be great, so let them test things out where the audience is smaller and more receptive. Roleplaying is an excellent tool to use in these instances as most times you may not want the staff member interacting with clients whilst they work things out.

Live


Staff can demonstrate actions or behaviours live on calls as part of coaching. You can demonstrate what you want a staff member to do and then allow them to repeat back live with a customer. Be wary of undertaking this if the coaching activity is around a compliance activity or action that could detriment the customer.

Couples

In group coaching sessions, you can pair staff up to roleplay together, this is especially useful if you have a large team. In this instance, you would demonstrate the action you want to be performed, then pair off staff to demonstrate this to each other, back and forth.

Step 3: Coach Provides Feedback





01 - What did the staff member think was good about what they just did?

Just like observational feedback, your staff member should go first to pull out any development and motivate them to open up.



02 - What does the coach think? Positives First, then Development.

Next, you give your thoughts, again starting with the positives before giving balanced developmental feedback.



03 - What did the staff member think they need to change/ improve?


Let the staff member tell you, based on the feedback so far, what they think they should stop, start or continue.



04 - What needs to change this time around?

Reach a consensus on what needs to change by giving your opinion, then discuss how you will show the staff member what to do.

**Step 4:
Repeat
Until
Embedded**



Repeat Repeat Repeat

Repeat the previous three steps until YOU are confident the skill has been embedded. Do not end the coaching session until the staff member can copy your desired behaviour.

Recording Coaching

Coaching activity is recorded on a coaching form. Best practice would be that the staff member receives a copy of this to ensure they are fully aware of their obligations post-coaching

Your coaching log serves two purposes:

- To record in detail what you did to support your staff member.
- To record the next steps. This could be more coaching, actions including targets), or training. ALL coaching should be recorded. The rule you should work to is: If it isn't written down, it didn't happen.

Action Planning



Action Planning

Supporting Ongoing Actions

Coaching may support actions that are already ongoing, as you are equipping staff to effectively undertake these actions.

Creating New Actions

Sometimes your coaching may change the nature of actions that you have set or invalidate them altogether. This isn't a bad thing, but does mean you will need to agree actions at the end of a coaching session.

Broadly, you want the staff member to implement what you have just made them do consistently so that you can assess its impact on calls. Actions should focus on staff members performing this activity and the nature of the observation you will perform to inspect what you expect.

Ideally there should be a measure or metric that the staff member is required to achieve: Remember HOW, HOW MUCH, BY WHEN.

As coaching tends to be more collaborative than feedback, it would be best practice to build actions by asking: "What are you going to do moving forward?" and then working a measure or KPI target to ensure that this can be quantified.

Tool Building

Coaching requires support to embed, and the nature of your role will mean you cannot be there for a staff member 100% of the time. Because of this, coaching sessions can be used to build tools with the staff member.

Tools are materials that support the demonstrated behaviour you have run through with your staff member.

Below are definitions of a number of tools you can use, this is by no means an exhaustive list. As a Coach it is your role to think outside the box and question:

- What would make this action easier?
- Is a tool available?
- If not, what could I develop?

Building tools is powerful best practice for Coaches as you only need to develop the tool once and add it to your repertoire. After that you can use it as an 'off the shelf' solution if the development need arises again.

Prompt Sheets

Staff already have a prompt sheet for their call flow in the form of a RAG document. When we coach we break down to a granular level a single aspect of the staff members activity.

To support staff members, Coaches can take those micro-skills that they have developed with the staff member and bullet point them as a prompt sheet. Providing this to a staff member means they have a physical reminder of the steps they need to take, supporting the learning that they have already had with you.

Building prompt sheets for development areas that are common within your team will mean you can quickly upskill staff members moving forward. You can then use these to form part of bespoke call assessments and observations.

Visual Prompts

Similar to Prompt Sheets, Visual Prompts are indicators that remind a staff member of a single, simple action.

These types of prompts need to be carefully positioned, as Prompt Sheets are tangible i.e. If they are not used it is immediately obvious. Whereas with purely visual prompts it is harder to observe their use.

Action

Produce a prompt sheet for a staff member to use off the back of your coaching session with them. Ensure that this material covers what you want the staff member to do and supports, but doesn't replace the coaching activity you ran with them.

Prompts

Activity Logs

To ensure that a staff member is consistently performing an action, or to monitor the effectiveness of an action, Activity Logs are incredibly useful.

Activity logs are sheets that staff members fill out every time they perform an action. You can dictate exactly what you are looking for OR the coaching you have just undertaken may lead this.

It is vitally important that you assess these regularly to reinforce the action and to give the staff member and yourself opportunity to discuss development and more skill building.

Activity – List Writing

You do not have to own the recording of activity a staff member performs, often it is more valuable for a staff member to see what they are doing as they record it. The simple act of doing this serves to reinforce the behaviour and if not performed, the staff member immediately can recognise this.

Action

To support a coaching session, ask the staff member to log instances of the coached activity, including references and outcomes. Ask them to discuss this with you a COB every day for a week and use spot checks to ensure throughout the week that this is being done.

Dialogue

Scripting

Where coaching has focused around building scripts or individual dialogue elements, it is a good idea to provide staff with this to act as a prompt or for staff to produce this under your supervision as part of a coaching session.

This can be staff member driven, and again it is advisable from a retention and engagement perspective to get a staff member to complete this.

Dialogue Building

How dialogue building differs is that normally this would be around a 'style' of dialogue with multiple choices for the staff member to pick from e.g. Positive Language.

The staff member would be provided with a sheet of dialogue options for them to select from, with a mandate to ensure all options were used by COB. This works well as staff members can drill down on their preferred dialogue options moving forward.

If you have suggested as part of a coaching session that a staff member uses specific dialogue or dialogue styles, then to support that with scripting that they have written makes your work that much stronger. Writing scripting down also gives you a check sheet to work to when observing that has been agreed with the staff member.

Self- Assessment

Self-Assessment Sheets

To ask a staff member to audit their call can often be a great coaching tool, but can be time consuming and is not always appropriate.

If you have coached out a behaviour, it may be useful for staff members to produce a self-assessment form that they can work through on calls and assign themselves a rating, or for you to provide one you have made.

This opens up a dialogue opportunity when this is fed back and discussed and again can act as a prompt for the staff member to complete their coached out activity.

Activity – Simplify

The easiest way to get to grips with a self-assessment form that supports coaching is to keep it broad. The Audit document we use currently is a good place to start.

Action

Take the current audit document you use to mark call and produce a version your staff can use to support their own call marking.

Starting To Follow Up

Once you have set goals, you need to ensure that these are being actioned by your staff.

Then, once your deadline has been hit, you need to ensure the activity has been completed to your satisfaction.

Action

Book two sessions with the staff you have fed back to already.

The first should occur half way through their actions timescale. This is for you to check their progress against what you have set them

The second session should occur on or after the deadline you have set and is to review completion of actions.

The PDP

Staff who are performing or over performing in their role should have long term development goals recorded on a PDP or Personal Development Plan. These PDPs should be reviewed regularly and 'owned' by the staff member as they should be working towards the objectives.

The PDP utilises the GROW model to build actionable mid to long term goals for staff to work towards and encourages them to take ownership of this process with the coach as a 'guide'.

Performing staff should have actions that turn them into over performers. These actions should relate to their current role and how to progress to a level of excellence.

Over performing staff should have actions that progress them into their next role, challenge them in their current role further, or turn them into Expert Role Models.

PDPs That Work: Objective Building



Get the objective right and you're half way to building an effective PDP. When creating a development objective remember the following key points:

Make it relevant to the business. Set a development objective that is geared to helping an individual stretch their ability to do their job much more effectively. Better still, stretch them to be able to do more than their current job and you grow your talent organically.

Make the objective specific. *"Improve my influencing skills"* is lacking in a few areas.. Is the cause of the development a lack of confidence in verbal communication or is it a lack of evidence and facts supporting the influencing process that's the problem. Finally, this objective is so broad it has the potential to overwhelm. The individual may not really know where to focus first and may therefore struggle to commit to action.

So the key to making the objective a good one is to ensure that:

- The objective is specific to the particular problem area.
- Include the context of the development need.
- Make it something realistic and achievable.

At this stage we are only interested in making the objective give us the best possible start. We have still yet to develop actions and timelines etc.

PDPs That Work: Action Planning

The next thing to do is create the actions that will lead to the achievement of the overall objective or goal. These actions are in essence are mini objectives.

Each should be a step along the path to achieving the major objective.

These should be SMART in their make up. For a PDP objective you should expect to have around 4-5 actions.

Creating actions in a 121 uses the same in methodology as actions set during observational feedback.

PDPs That Work: Timescales

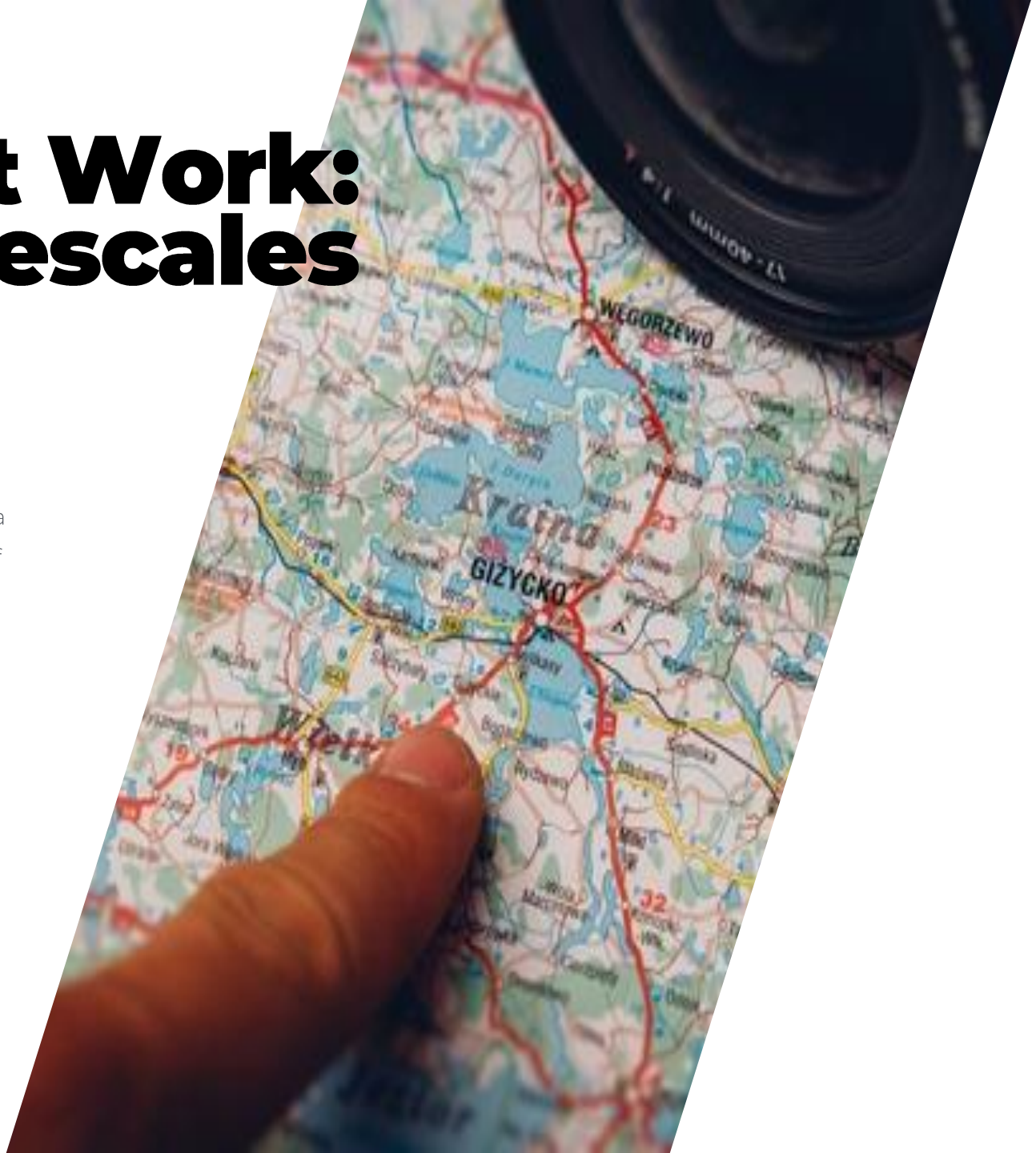
Once you have your objectives and actions in place you should commit them to a timescale.

There are a few things to be wary of when setting timescales for a PDP. Don't create them in isolation of each other. There is a bit of a tendency to end up with timescales that all converge at the same point.

Once you've set each of the dates go back over them and sense check that they fit together and make it still realistically achievable.

You then need to diarise regular reviews with the individual. Ideally these should be monthly. Each review gives you the opportunity to check that the PDP objectives are still achievable against the current workload.

The PDP is a work in progress and, just as with other business objectives should be reviewed and adapted when needed.



PDPs That Work: Measures Of Success

Start with the end for each objective. Define what success will look like.

How will the individual be doing things differently once they have developed?

Where possible make the measures as tangible as possible. Think of the improvements to targets, efficiency, quality and examine how these can be shown in financial terms. Good, tangible measures help to show that the development is making a difference.

If you implement the above, whether it be on a crude sheet of paper or with the aid of a computer software package, you will see aspects of your business improve.

Imagine everyone in your business going into work tomorrow and doing their jobs just 10 mins quicker and getting things 10% more correct the first time. How much would that be worth to your business? Well, you can easily achieve more than this with good well written PDPs.

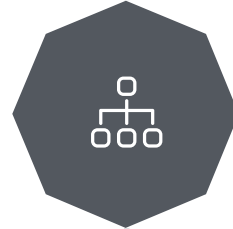
If you are keen to have a go at implementing the above but are unsure where to start or have some questions that need answering please do give us a call. We'll be only too pleased help you.

Next Steps



Identify and Plan Coaching

Once you start to feed back and follow up with staff, you will identify skill gaps that cannot be filled with feedback, these are your coaching areas. Before a session, consider your training and plan before you begin.



Deliver Sessions and Follow Up

Deliver your coaching, ideally whilst observed by another coach who can provide observational feedback. Remember, the initial coaching session is only a part of a larger whole. Once coaching has landed, you need to follow up to ensure this activity is ongoing.



Start to Build a Toolkit

Once you start to identify trends within your coaching activity, its time to start building tools to quickly address these issues rather than plan coaching for every individual. Look at what was successful and standardise this, then you can assess its effectiveness across your whole team.