

THE COACH  
trainer's Guide

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## CONTENTS

### 5 ABOUT THE PACK

Introduction 7

Aims 8

Contents of the pack 9

Synopsis of video 10

### 11 TRAINER'S NOTES

Suggested Programme 13

Preparation 13

Session 1 - What is coaching? 14

Session 2 - Show and discuss the video 15

Session 3 - The manager's role as coach 24

Session 4 - The coaching process 27

Session 5 - One-to-one coaching skills 33

Session 6 - The value of coaching 38

### 41 RESOURCES

Handouts

OHPs

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## *About the pack*

**INTRODUCTION**

**AIMS**

**CONTENTS OF THE PACK**

**SYNOPSIS OF THE VIDEO**

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## INTRODUCTION

Coaching is one of the most flexible, cost effective ways of providing training. But many managers don't appreciate or they underestimate their involvement in coaching. They equate training with attendance on courses.

There is some confusion as to what coaching is. It is not simply "Sitting with Nellie" - watching someone else do the job and picking it up from them. Effective coaching involves helping individuals systematically develop the necessary knowledge, skills and attitudes to do a job properly. This requires planning and structuring. Just because we can do a job well, it does not mean that we can automatically teach others to do it.

Managers are responsible for the continuous development of every member of their team. This requires a direct involvement in their training, coaching them in those activities which are best learned on the job. The Coach will help managers become good coaches.

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## AIMS

The Coach will help managers at all levels to appreciate their responsibilities for the development of their staff and the contribution that they should be making as managers. The package will

- ▶ Show how important it is for managers to identify their role in providing opportunities and implementing coaching programmes.
- ▶ Provide a logical structure to help plan and conduct coaching sessions.
- ▶ Demonstrate the skills needed to become a good coach.

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## CONTENTS OF THE PACK

The package consists of

- ▶ A 23 minute video, *The Coach*, which
  - introduces the need for coaching and emphasises the line manager's responsibilities
  - illustrates two main aspects of a coaching programme; the long term learning activity and the more immediate one-to-one form of instruction
  - provides a straightforward outline of the coaching process based on the mnemonic STEER
  - demonstrates the skills of coaching.
- ▶ This Guide which contains the following sections
  - *About the pack* which introduces its use
  - *Trainer's notes* which provide a suggested course programme and detailed session plans for running the course
  - *Resources* Handouts and OHPs for use in delivering a course.

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## SYNOPSIS OF THE VIDEO

Dave is responsible for key customer accounts. He is good at his job. But unlike Susie, the marketing manager, he does not appreciate that his management responsibilities include bringing on and coaching his staff, Maria and Gary.

His failure to do so causes him problems: his poor instruction of Gary in the use of a new priority ordering system jeopardises a major customer account, Morleys; his insensitivity to Maria's aspirations not only reduces her potential contribution but threatens to break up the office team.

Outside of work Dave is the successful captain and coach of his local football team. He keeps a photograph of his old coach in his office and gives him regular match reports. When he is unable to understand why things are going wrong at work, Coach reappears in Dave's 'hour of need' to point him in the right direction.

He helps an initially sceptical Dave realise that his current predicament is a direct result of his failure to accept his managerial responsibility to coach. He gets him to see the connection between his football coaching and how he should coach in the office. Together they analyse how Dave runs his team's training sessions. Coach pulls it all together using a mnemonic STEER to present the key stages in the coaching process.

Dave sets out to practise his coaching skills in the office. With a few nudges from Coach he makes a much better job of it and resolves his difficulties.

## *Trainer's notes*

**COURSE PROGRAMME**

**PREPARATION**

**SESSION 1: WHAT IS COACHING?**

**SESSION 2: SHOW AND DISCUSS  
THE VIDEO**

**SESSION 3: THE MANAGER'S ROLE  
AS COACH**

**SESSION 4: THE COACHING PROCESS**

**SESSION 5: ONE-TO-ONE COACHING  
SKILLS**

**SESSION 6: THE VALUE OF  
COACHING**

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## COURSE PROGRAMME

This is a suggested outline for a half-day course on coaching.

Session 1 - What is coaching?	10 mins
Session 2 - Show and discuss <b>The Coach</b>	80 mins
Break	15 mins
Session 3 - The manager's role as coach	20 mins
Session 4 - The coaching process <b>STEER</b>	40 mins
Session 5 - One-to-one coaching skills	30 mins
Session 6 - The value of coaching	15 mins
Total	5 hours 30 mins

## PREPARATION

Decide and plan what you want the course to achieve. Take account of the needs, expectations and attitudes of the participants.

Preview the video, *The Coach*. Work through the *Trainer's notes* adding your own notes and emphasising those points which are particularly appropriate to your situation.

Note that the course provides the knowledge and awareness of skills to improve coaching effectiveness. Participants will need to go on to practise these skills and to receive feedback from an experienced trainer to gain full benefit.

## SESSION 1: WHAT IS COACHING

### INTRODUCTION

Make introductions.

Explain that the purpose of the course is to become more effective at coaching by

- accepting the manager's responsibility for coaching
- understanding a simple model of the coaching process
- appreciating the skills involved in coaching.

Describe the course programme and timetable.

### WHAT IS COACHING?

Ask participants what they think coaching consists of. Record their answers on a flipchart.

Discuss and group the responses using the following headings (OHP 1)

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

Explain that these are the three aspects of coaching that the course will be addressing.

#### COACHING

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

OHP1

## SESSION 2 - SHOW AND DISCUSS THE VIDEO

### INTRODUCE THE VIDEO

Tell the group that the video, *The Coach*, is also about these three aspects of coaching. In the video Dave is a customer accounts manager. He is good at his job except in the matter of bringing on his staff, Maria and Gary. Outside of work Dave is captain of his football team. The video shows how Dave becomes a better manager by transferring his sports coaching skills to the office.

Suggest that participants look out for good and bad examples of coaching while watching the video.

Show the video. It runs for 23 minutes.

### DISCUSSION OF THE VIDEO

Lead the discussion by analysing the different coaching relationships in the video.

Start by asking participants what coaching relationships they identified.

There are five

- ▶ Dave's preparing Maria to deal directly with customers
- ▶ Dave's instructing Gary in the processing of priority orders
- ▶ Dave's coaching of his football team
- ▶ The intervention of Dave's former coach
- ▶ Maria's encouragement of her subordinate Mark.

Discuss each of these relationships in turn to bring out the training points from the video.

Use the three aspects of coaching to stimulate and structure discussion (OHP 1)

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills.

They are brought out in varying degrees in each of the relationships.

#### COACHING

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

OHP1

Alternatively, and depending on numbers, you may wish to divide the participants into small groups. The groups each discuss a different relationship and then take it in turn to report back to the group as a whole. (Don't include Susie's coaching of Mark as this is observed only briefly as a contrast to Dave's behaviour).

Bring out the following points in discussing each of the examples of coaching in the video. You may find it helpful to replay parts of the video, in particular the scenes in which Coach introduces Dave to STEER and Dave's second attempt at showing Gary how to process the priority orders.

### DAVE'S PREPARING MARIA TO DEAL DIRECTLY WITH CUSTOMERS

The manager's role as coach

- ▶ Stress that coaching is part of the manager's job.

*"Pity he doesn't work on a few more things with us."*

Dave's lack of appreciation of the need to be personally involved in the training of his staff results in his failing to recognise Maria's high level of motivation and her need for progression and enrichment. Her offers to accompany Dave to Morleys are turned down.

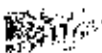
- ▶ Suggest that coaching is as relevant to longer term development of higher level skills as it is to one-to-one instruction.

Dave does not recognise that coaching is just as applicable to helping Maria learn how to deal with customers as it is to showing Gary how to use the new ordering system. When she considers trying to find a job in another department, Dave is genuinely hurt - *"I thought we got on"*. He does not yet realise that he is to blame and has not really heard what Maria has been saying.

- ▶ Managers can become good coaches

Coach helps Dave reassess his role. When Maria's solution to the Morley's problem emphasises her untapped potential, Dave now recognises an opportunity to make use of her skills and to develop them further by taking her on his next visit to Morley's.

*"Look you're the one who really knows the figures. You'd better come with me."*





## Coaching is a systematic process

Coach provides Dave with a simple model of coaching, STEER. Encourage participants to give examples of how Dave puts this into practice with Maria.

### ► Spot opportunities

*"I thought we could run through it before we go."*

When Maria expresses some concern because of her lack of experience, Dave, prompted by his Coach, spots an opportunity to develop her skills by discussing the visit with her.

### ► Tailor training to the individual

*"You've not met Paul before have you?"*

Dave tailors the training to meet Maria's needs by anticipating the client's questions.

### ► Explain and demonstrate

*"You've got to take things slowly with Paul."*

He helps her prepare her replies by giving her guidelines, explaining, how to deal with the customer.

### ► Encourage

*"You were brilliant."*

After the meeting Dave is quick to encourage Maria on her performance.

### ► Review

*"What did you think? Let's go through it on the way back."*

He suggests reviewing her performance so that she can identify areas for improvement.

### ► Coaching is a continuing process

The pay off for Dave is that he is able to send Maria to deal with a customer by herself. However, he has not forgotten that exercising his coaching responsibilities is a continuous process and he spots a further opportunity to develop Maria's expertise.

*"You could go. Why not? We'll have a chat first, alright?"*

## DAVE'S INSTRUCTING GARY IN THE PROCESSING OF PRIORITY ORDERS

### Dave's lack of coaching skills

Make the point that coaching uses day to day work opportunities to train.

But Dave's first attempt to show Gary how to process priority orders clearly indicates that he does not know how to coach effectively.

Dave: *"They're like any other order, more or less, except they're priority."*

Gary: *"Why?"*

Dave: *"Because they're priority orders, Gary."*

### He's failing on a number of points

#### ▶ Lack of planning

His sudden announcement, *"This is something you need to know about"*, and possibly sudden realisation, shows lack of planning. Dave does little more than think out loud while processing an order himself.

#### ▶ Failing to engage with learner

Dave has no eye contact to gauge Gary's reactions. He asks Gary if he is watching but doesn't look to confirm that he is.

#### ▶ Insufficient explanation

His answers to Gary's questions have insufficient explanation to promote understanding.

#### ▶ Not providing a context

Moreover he fails to provide a context, an explanation of why the new system has been introduced.

#### ▶ Failing to review

*"Any thing you need to know, it's all in there. Alright?"*

Without confirming that Gary is able to undertake the task properly, Dave allows himself to be interrupted by a telephone call and leaves with an unjustified conclusion.

#### ▶ Missing opportunities for coaching

*"You haven't read the version update, have you?"*

Gary's lack of expertise is due in part to his not being familiar with the version update. Dave points this out but has failed to recognize his own responsibility for ensuring that Gary has read and understood the instructions.

The following day when Gary tells Dave that he didn't understand the update, 'Written in Triple Dutch by a robot', Dave again fails to recognize his responsibility to help Gary. Instead he places the responsibility on Gary's shoulders, 'You'll sort it out'. When the order isn't processed properly Dave blames Gary who in his defence claims, quite correctly, 'You never showed me right anyway'.

### The process of coaching / Coaching skills

Having recognised his responsibility thanks to Coach, Dave attempts to put STEER into action when he has another go at showing Gary how to operate the priority ordering system.

*"I was thinking we should go through this again. Properly this time."*

There are particular skills involved in coaching. Dave demonstrates, with prompting from Coach, some of these skills. Encourage participants to give examples

#### ► Spot opportunities

Dave realizes that he needs to train Gary properly. He has his notes prepared and ensures that he will not be interrupted. He chooses his moment, spots his opportunity.

#### ► Tailor

He begins by clarifying Gary's existing knowledge, "You know why we brought in these priority orders?", so that he can tailor the training.

#### ► Explain

This time when Dave explains and demonstrates the procedure, he invites Gary to ask if he doesn't understand. Prompted by his own Coach, Dave explains the process this time rather than just doing it.

#### ► Encourage

He confirms that Gary is doing the job properly and encourages him, "That's it" and "Good". He resists the temptation to correct Gary and involves him, "No. You

tell me" and "Are you sure?". Gary's response, "Not giving them jam on it", evokes a laugh from Dave and shows that the rapport is building between them. Further prompting from Dave comes when he reminds Gary "This is where you went wrong with Morley's. Answered no, didn't you". When Dave is sure that Gary can do the job properly, he encourages him, "That's good Gary", and makes himself available should Gary need any further help, "Any problems, just give me a call".

► Review

Later, Dave reviews Gary's performance, "How's it going, any problems?". He corrects his work, "You haven't logged the time", and reinforces his understanding, "Do you know why you need to?". Later Dave checks that the training has stuck, "We winning, Gary?".

## DAVE'S COACHING OF HIS FOOTBALL TEAM

### The manager's role as coach

#### Remind the group that

► Coaching is about improving performance

In contrast to his role in the office, Dave is fully aware of what his football coaching involves. At the opening of the video Dave is busy analysing his team's needs, "I mean, what went wrong?" He is trying to spot areas for development.

► Coaching is about developing individuals

Dave is also on the look out to bring individual players on while recognising he must help them do so.

"With Roy out Darrell's going to move into mid field. You're playing well. We'll have a chat later."

The pay off for Dave's efforts is that his team wins the replay. Dave is pleased because "they did everything I told them".

#### The process of coaching

Though he may not have thought it through consciously, Dave has developed a systematic approach to coaching.

"You're letting him take the ball off you. Like their number five on Saturday."

Having observed closely the performance of the players, he

- ▶ Spots Andy's weakness
- ▶ Tailors his training to meet Andy's particular need
- ▶ Explains and demonstrates how he should shield the ball. Andy practises the shoulder movement and Dave physically guides him into the correct body position
- ▶ Encourages Andy as he practises "You're getting it," and later "Nice one, Andy, you've got it."
- ▶ Continues to monitor how Andy is getting on and subsequently reviews his performance "See what I mean? Not better, wasn't it."

### THE INTERVENTION OF DAVE'S FORMER COACH

The process of coaching

*"No observation, no proper coaching, no wonder the team's falling apart."*

Coach's intervention helps Dave apply his coaching skills to the workplace so that he can be more effective as a manager. The Coach himself models how STEER should be applied.

- ▶ Spot opportunities

*"You really want to know, son?"*

The Coach spots the opportunity to train Dave when he is at a low ebb. The Coach points clearly to where the training need lies and what Dave's responsibilities are - *"Those youngsters need bringing on, steering in the right direction"*

- ▶ Tailor

*"It's not as though you haven't done any coaching."*

Coach helps Dave see the connection between his football team and his team at work. By helping him analyse his football coaching, the Coach helps Dave recognise that he has the skills to develop his team at work.

- ▶ Explain

He explains the simple coaching model - STEER.

- ▶ Encourage

*"Where are you going to start?"*

Dave is then encouraged to put it into practice.

► Review

*"You keep your eyes open. Bringing them on, that's what it's all about."*

The Coach's final involvement is to review how Dave is getting on.

**Coaching skills**

Throughout Dave's training of Maria and Gary, the Coach demonstrates many of the instructional skills and qualities of a good coach. Encourage participants to give examples

- **Prompting:** *"don't just go charging in, son. Find out what he knows."*
- **Correcting:** *"hang on, hang on. Start at the beginning."*
- **Encouraging:** *"well done son."*
- **Quing:** *"opportunity son"* to prepare Maria for the meeting
- **Being available**

Dave: *"Things are looking up, Coach, thanks to you."*

Coach: *"Any time, son."*

**SUSIE'S ENCOURAGEMENT OF HER SUBORDINATE, MARK**

**The manager's role as coach**

*"She helps you get on, learn new things."*

Remind the group of Maria's remark about Susie, the marketing manager. Her approach is in direct contrast to Dave's. She is aware of her role in developing her staff. She is giving Mark new responsibilities by delegating her department's day to day interest in the new ordering system. But she isn't just throwing him in at the deep end. She is coaching him and brings him along to her meeting with Dave because *"It's time he saw how we do things at your end."*

## CONCLUSION

Conclude by making the following general points

- ▶ Coaching improves performance

*"Helping them do their jobs better. Bringing them on. That's what it's all about."*

Coaching is not just a 'good' thing to do. As Dave learns it has a direct bearing on the effectiveness of his department. Not only is coaching important to the successful introduction of new procedures or equipment, as with Gary and the priority orders, but it is also central to realising an individual's potential to develop higher level skills, as with encouraging and helping Maria to deal directly with customers.

- ▶ Everyone can be a good coach

*"You had it there all the time."*

We often compartmentalise our lives and fail to see how one part may have a bearing on another. Coach helps Dave to make such a connection by helping him discover for himself that the skills he practises in a sporting context are equally applicable in the workplace.

- ▶ It takes two!

*"You must have some idea ... training the lads ... what about the other night?"*

Coach gets Dave to work it out for himself. A key ingredient in successful coaching is the active involvement of the person being coached. This encourages the individual to take responsibility for his/her development. This in turn breeds confidence and a continuing desire to improve performance.

Summarise the discussion of the video by reminding participants of the three aspects of coaching (OHP 1). Tell the group that you will be looking at each of these aspects in more detail after the break.

**BREAK**

### COACHING

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

OHP1

## SESSION 3: THE MANAGER'S ROLE AS COACH

- ▶ Stress that managers have a training role

*"I'll talk to Alex. Get him to fix you up with a course. Alright?"*

Remind the group of Dave's response to Maria's plea to be given more opportunity to learn to deal directly with customers. It is typical of many line managers who do not recognise their role as coach. The overall message of the video is that all managers and supervisors are responsible for the training and development of their staff as part of their day-to-day management responsibilities.

- ▶ Emphasise that coaching is 'on the job' training

*"It is your job. These youngsters need bringing on. You're the one responsible."*

Coaching uses day to day work as a vehicle for training. It is about developing the experience of individuals by giving them systematically planned and progressively more stretching tasks to perform coupled with continuous appraisal and counselling. Those involved in coaching must themselves be properly trained and practised in the coaching process.

- ▶ Ask participants why there isn't more coaching done. Record their responses on a flipchart.

Suggest that these barriers fall into two main groups - barriers relating to the manager and barriers relating to the individual.

Make sure the following points are made

- ▶ Barriers relating to the manager
  - the belief that training is totally the function of the training department
  - the belief that coaching is 'being thrown in at the deep end'
  - a lack of time on the part of the manager
  - a lack of coaching skills
  - a lack of technical knowledge or ability on the part of the manager



- an unwillingness to develop staff for fear of losing control
  - a lack of appropriate interpersonal skills on the part of the line manager
  - a lack of commitment to the organisation and its objectives on the part of the manager
  - a personality clash between the manager and the individual.
- ▶ Barriers relating to the individual
- a lack of potential or aptitude on the part of the individual
  - a lack of commitment to the organisation and its objectives on the part of the individual
  - a lack of opportunity for advancement after training
  - attempting to coach individuals on tasks that are too difficult or too advanced for them
  - an individual's fear of appearing foolish in front of his/her manager or colleagues
  - an individual becoming alienated from other colleagues because favouritism is perceived.
- ▶ Stress that in both cases it is the manager who can do most to overcome these barriers by developing a positive attitude to training, by developing coaching skills, and by good management of the coaching process

- make time

Managers need to appreciate that the training department cannot have expertise in everything. Whilst it meets the training needs of a large number of staff, there are specialist areas where managers are the most appropriate people to develop individuals. This developmental process has to be seen as part of a manager's role. Time must be invested to gain a worthwhile return. Ultimately this will allow the manager to devote more time to other pressing activities.

The idea of being thrown in at the deep end needs to be replaced by a commitment to planned and structured coaching sessions.

- create a supportive environment

Managers can also help to overcome those barriers relating to the individuals being coached. Managers need to demonstrate that coaching is a normal part of the relationship between the manager and individual. They need to create a supportive environment in which learning and development are a natural and every day feature of work for everyone.

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## SESSION 4: THE COACHING PROCESS

Replay the scene from the video in which Coach introduces Dave to STEER.

Remind participants of the mnemonic STEER (OHP 2). Discuss each stage of this model of the coaching process.

- ▶ Spot training needs and opportunities to meet them.
- ▶ Tailor training content and style to meet the needs of the individual.
- ▶ Explain and demonstrate how the task should be done.
- ▶ Encourage the individual whilst he or she is learning.
- ▶ Review progress during and on the completion of learning.

### THE COACHING PROCESS

Spot

Tailor

Explain

Encourage

Review

STEER

OHP 2

### SPOT TRAINING NEEDS AND OPPORTUNITIES TO MEET THEM

Suggest that whenever there is change in an organisation, there are likely to be training needs that arise and have to be met. Similarly, as individuals progress through the organisation they are likely to have new training needs. Managers are usually reactive in meeting such needs but they can also adopt a proactive role and look ahead to anticipate training needs and make provision for them.

Ask the group to suggest ways in which training needs can be identified, both for the organisation and for the individual.

Add any of the following which do not come out in discussion

#### ▶ Identifying needs

Needs can be identified in the following ways

##### Organisational needs

- changes to corporate objectives and strategy
- introduction of new procedures/products
- introduction of new equipment
- manpower/succession planning
- promotions
- staffing crises.

### Individual needs

- appraisal interviews
- underperformance of individuals/complaints from customers/other departments
- direct observation of staff
- approaches from staff for developmental opportunities.

#### ► Creating opportunities

Stress that the best way to create opportunities to meet needs is by careful planning

- short and long term planning of known departmental activities/commitments
- as part of a planned delegation strategy.

Suggest that managers should also be aware of other opportunities to meet needs that can arise as a result of

- additional regular commitments being taken on by the department
- job cover needed as a result of absence
- individuals asking to be involved in specific developmental activities.

### **TAILOR TRAINING CONTENT AND STYLE TO MEET THE NEEDS OF THE INDIVIDUAL**

Emphasise the importance of planning. As with delegation, the learning experiences must be relevant to the individual's and the organisation's needs.

The learning activities should be planned in such a way that they progress from the comparatively simple to more complex tasks. The individual must be committed to the plans and see and accept the relevance of the learning activities.

#### ► Introduce action plans

Action plans should be documented and should include

- learning activities expressed in terms of outcome (objectives), eg plan monthly transport schedule/prepare quarterly sales report

- target dates or specified periods when the activity will be undertaken
- stages at which reviews will be undertaken
- sign off to confirm that learning objectives have been achieved.

► Stress again the importance of planning

For each task within the action plan thorough planning is needed in order to

- reinforce the credibility of the programme and of the line manager
- ensure training is structured and complete
- create a supportive learning environment and demonstrate commitment to the individual
- fit in and around the ongoing work programme.

► Explain that one-to-one instruction is at the heart of coaching. Sound preparation is essential.

Ask participants to suggest what needs to be covered in preparation. Make sure the following points are made

- list points to be learned and activities to be practised
- divide the work into digestible 'chunks' of learning
- allocate sufficient time to cover each 'chunk'
- collect any documents, forms, equipment or make sure that equipment and facilities are available when needed
- if appropriate, prepare simple job aids or examples
- ensure the learning environment is neat and uncluttered and that there will be no interruptions
- confirm availability of other staff if they are likely to be needed.

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## EXPLAIN AND DEMONSTRATE HOW THE TASK SHOULD BE DONE

### ► Introducing the coaching session

Suggest that individual sessions need to be introduced properly so that both the individual and the coach are clear in their own minds about what they have to achieve.

Points to cover in Introductions are:

- confirmation that the individual has understood and can perform tasks learned during the previous session
- topic to be covered
- objective - a clear statement of what is to be achieved
- context of the session - what has been done so far and how this session links with it
- structure of the session - what will be covered and how
- motivation - what the individual is going to get out of this session.

### ► Explain and demonstrate

Emphasise that demonstrations can be of practical, procedural and interpersonal skills. Whenever possible demonstrations should be accompanied by explanations. When this is not possible, eg. when the coach is conducting an interview with a real customer or chairing a meeting, then an explanation of what happened should be given as soon after the event as possible.

Explanations should be

- in a logical sequence
- clear and concise
- in digestible 'chunks'
- relevant and accurate
- delivered at an appropriate speed and with interest
- free of jargon or with jargon explained
- supported with visual aids when appropriate
- supplemented with questions when appropriate.

## **ENCOURAGE THE INDIVIDUAL WHILST HE OR SHE IS LEARNING**

Suggest that allowing an individual to undertake a task without monitoring progress and giving support is tantamount to throwing them in at the deep end. Progress must be monitored and encouragement given in the form of assistance and feedback.

### ► Provide feedback

- ensure that 'live' work is being done properly
- prevent wasted time and effort if the individual makes errors
- reinforce learning
- maintain the individual's motivation
- confirm that progress is being made and standards achieved.

### ► Monitoring

The frequency of the monitoring will be decided by the nature of the task being learned. It can be

- continuous observation during the learning of short practical tasks
- occasional monitoring at intervals or at important stages in the learning of lengthy tasks.

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## REVIEW PROGRESS DURING AND ON COMPLETION OF TRAINING

Suggest that assessing outcomes can take place after learning events have just been undertaken, at stage reviews or at the end of a longer project.

Ask participants what the purpose of reviewing is. The aim is to take stock of what has been learned and the way in which the learning has taken place. With the aid of action plans and learning journals the following should be discussed with the individual

### ► Review systematically

- how far the objective has been achieved
- how confident the individual feels to undertake the task in the future
- how the newly learned skills or procedures will be used in the future
- areas which still cause problems or need more practice
- aspects of the learning which the individual found difficult and how they might be made easier
- aspects of the coaching process that made learning easier
- support given by the coach
- structure and timescales for the learning experience
- what the next stage of learning will be.

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## SESSION 5: ONE-TO-ONE COACHING SKILLS

Explain that STEER describes the process of coaching and provides a sound framework for success. However, in order to make the process effective the coach has to exercise a range of skills. It could be argued that the coach also needs to possess particular qualities.

Suggest that the list of qualities and skills that could be drawn up is endless but can be consolidated into a small number of critical activities which reflect both skills and qualities which are exercised before, during and after each coaching session.

### BEFORE COACHING BEGINS

Ask participants to suggest what skills and qualities the manager needs before coaching begins. Bring out the following points in discussion (OHP 3)

#### ► Awareness and commitment

These represent the underlying attitude which must be there before the coaching process can begin. Managers have to be aware of the importance and value of developing staff and be committed to giving their time and support to that development.

#### ► Assessing potential

Not everyone can be developed to the same degree or at the same speed; in some circumstances there are individuals who may not be able to progress very far. Trying to force them through developmental programmes can be demotivating for them and annoying for the coach. Potential can be gauged in activities which make up the daily routine and individuals targeted for tasks appropriate to their ability when opportunities arise.

#### ► Planning and negotiating

Developmental activities need to be planned carefully so that the learning experience can be complete; it is not appropriate to allocate 'rush jobs' as developmental tasks unless the individual is ready to think and act quickly. But time is always at a premium and the coach needs to assess and negotiate with the individual timescales and targets to achieve the task.

### COACHING SKILLS: BEFORE

- Awareness and commitment
- Assessing potential
- Planning and negotiating
- Creating a supportive environment
- Briefing

OHP3

- ▶ Creating a supportive environment.

Undertaking new tasks usually brings an element of anxiety and uncertainty as well as being motivating. It is likely that individuals will need support and reassurance at times for no-one likes to get things wrong. A supportive environment is one in which the coach is available and approachable when needed, even on those occasions when they would least like to be disturbed! It is also an environment in which the individual does not feel that the coach is being judgemental whenever advice is requested.

- ▶ Briefing

Poor outcomes of developmental activities are often the result of the individual not being properly briefed. A thorough briefing should include:

- the task to be undertaken – why it is important and relevant to that individual
- the outcomes or objectives
- time scales and reporting stages
- resources, references, materials available
- limits of authority
- support of other staff and availability of coach.

Distribute *Handout 1: A Learning journal* proforma.

## DURING COACHING

Explain that you are now going to look at the skills and qualities that are needed during coaching (OHP 4).

Replay the scene from the video in which Dave practises his coaching skills in showing Gary, for the second time, how to use the priority ordering system

- ▶ Explaining and demonstrating

Stress that people learn at different speeds and in different ways. Some need to be involved and to have hands on experience from the outset while others prefer to absorb everything before they put things into practice. These learning styles can be identified very early in a coaching session by the way in which the trainee reacts to explanations and demonstrations. The coach must be prepared

### COACHING

#### SKILLS: DURING

- ▶ Explaining and demonstrating
- ▶ One-to-one instruction
- ▶ Monitoring

to allow people to 'have a go' even if it means learning from mistakes. He or she must also have the patience to repeat explanations and demonstrations for those who need to be absolutely certain what they are doing before they attempt a task. In this latter case the coach may find it useful to break the training up into small chunks of learning.

► One-to-one instruction

Explain that when the task being learned is one which requires the coach to work with the trainee closely, as when a piece of equipment is being used, a number of specific instructional skills are called upon.

Ask the group for examples of such skills. Bring out the following

- **cuing**  
telling the trainee what they have to do next so that the flow of the activity is continuous.
- **prompting**  
telling the trainee what to do when they have forgotten.
- **correcting**  
telling or showing the trainee what to do when they have made a mistake.
- **guiding**  
moving a trainee's hand on a key board, adjusting the way in which they hold an implement or positioning their body to perform a movement correctly.
- **confirming**  
telling the trainee that they are performing the task properly.
- **supplementing**  
giving additional information to develop a deeper understanding of what is being learned.

- **resisting**  
not being tempted to intervene to correct or prompt when it is appropriate to let the trainee learn from mistakes.
- **contextualising**  
placing the task in the wider context of the job or in the context of business objectives to assist understanding and to motivate.
- **clarifying**  
making clear parts of an explanation which the trainee does not fully understand.
- **questioning**  
testing a trainee's understanding to confirm that they are performing tasks correctly.
- **observing**  
watching the trainee to see that they are performing tasks correctly.
- **analysing**  
studying the trainee's performance to identify the nature of errors so that they can be corrected properly or to reinforce aspects of good practice.
- **intervening**  
stopping the trainee from making a costly or dangerous error or an error which would cause unnecessary confusion or reinforce incorrect behaviour.
- **empathising**  
being able to imagine and share the experiences and feelings of the trainee.
- **exercising patience**  
not becoming irritated by lack of speed, aptitude or learning style of trainees who encounter difficulties.

▶ **Monitoring.**

Even though individuals may know that they can always ask for help and reassurance, they are often reluctant to do so. It is important that, in addition to the reporting

stages, the coach monitors progress as part of the daily rapport with individuals. The encouraging word, the repeated invitation to ask for help if it is needed, the confirmation that they are doing well are all important. When a costly error could be made, the coach has little option but to intervene and correct. This again needs to be done in a supportive and understanding way with explanations and demonstrations rather than unconstructive criticism and reproof.

But it is important to resist the temptation to intervene (unless absolutely necessary) when an error is likely to be made from which the individual will learn. Such events should be noted and discussed as part of a stage review or debriefing.

### AFTER COACHING

Ask participants what skills are needed after coaching (OHIP 5)

► Evaluating

Achieving a successful outcome to the task is not sufficient in itself for the development of the individual. The process that they have gone through will have increased knowledge, developed skills and given insight into aptitude, ability and a range of personal skills and qualities. The coach should observe and note indicators to build on these in discussion at stage reviews or during a debriefing.

► Debriefing

Giving feedback is likely to make up a considerable part of the debriefing. It also provides the opportunity to round off the learning activity by reviewing the individual's learning journal, discussing how what has been learned can be applied in the future, and what the next learning experience might be.

The review stage should not be confined to the progress and achievements of the individual being trained. It provides an opportunity for the coach to review his or her performance. This can be done by discussing with the trainee what the coach did that helped their learning and areas where they experienced difficulty.

Distribute *Handout 2: A Coaching Checklist*, a checklist to help managers monitor their performance as coach.

#### COACHING SKILLS: AFTER

- Evaluating
- Debriefing

OHPS

## SESSION 6: THE VALUE OF COACHING

Stress that effective coaching requires time and effort. So why bother? Ask participants what they think the benefits are. Bring out the following points

- coaching can be given at times when it is needed rather than having to wait for a place on a course
- it can be flexibly fitted around the individual and the demands of the job
- it can be job specific
- it can be tailored to meet individual needs
- the overall costs of training can be reduced
- the individual can be productive whilst learning
- progress can be monitored easily
- individual learning preferences and speed can be catered for
- it leads to higher levels of morale and motivation in individuals and in the team as a whole
- it contributes to the building of a competent and flexible workforce
- it contributes to the development of effective communication with the team
- it creates an environment for team building
- it helps to develop closer working relationships
- It develops the skills of managers who monitor their own performance
- IT WORKS!

FOR PREVIEW ONLY

## CONCLUSION

Recap on the three aspects of coaching you have covered on the course (OHP 1).

Ask the group to spend five minutes thinking about how these apply to their own situations. Suggest that they identify and note specific opportunities to coach and invite experienced trainers to observe and give them feedback.

Remind the group of STEER (OHP 2).

Stress that by being better coaches they will improve the performance of their workgroups and also their own effectiveness as managers.

**COACHING**

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

OHP 1

**THE COACHING PROCESS**

- Spot
- Tailor
- Explain
- Encourage
- Review

**STEER**

OHP 2

FOR PREVIEW ONLY

**FOR PREVIEW ONLY**



## Resources

**FOR PREVIEW ONLY**

**HANDOUT 1: A LEARNING JOURNAL**

Name.....

Task objectives .....

Reporting Dates (s) .....

<b>Knowledge and skills acquired</b>	
<b>Difficulties encountered</b>	
<b>Lessons learned</b>	
<b>Feedback from Coach</b>	

**FOR PREVIEW ONLY**

## **HANDOUTS AND OHPS**

The following Handouts and OHPs are provided

Handout 1: Learning Journal

Handout 2: Coaching Checklist for Managers

OHP 1: The Coaching Process

OHP 2: Coaching Skills: Before coaching

OHP 3: Coaching Skills: During coaching

OHP 4: Coaching Skills: After coaching

**FOR PREVIEW ONLY**

## HANDOUT 2: COACHING CHECKLIST

- ▶ Did I identify appropriate opportunities to match developmental needs?
- ▶ Did I confirm the individual's existing level of knowledge and skill?
- ▶ How well did I prepare?
- ▶ How did I put the task into context in terms of the individual's development?
- ▶ How did I motivate the individual?
- ▶ Did I state the objective of the task clearly?
- ▶ Was the learning experience divided into digestible chunks?
- ▶ Was the learning experience organised in a logical order?
- ▶ Were my explanations and demonstrations clear?
- ▶ Did I highlight key points?
- ▶ How did I monitor the individual's progress?
- ▶ Was the feedback that I gave helpful?
- ▶ Did I consolidate the learning experience by discussing the Learning Journal in detail?
- ▶ Were positive action points drawn from the learning experience?
- ▶ Did I look forward to the next step for the individual?

# COACHING

- ▶ The manager's role as coach
- ▶ The process of coaching
- ▶ Coaching skills

FOR PREVIEW ONLY

# THE COACHING PROCESS

Spot

Tailor

Explain

Encourage

Review

STEER

FOR PREVIEW ONLY

OHP 2

# COACHING SKILLS: BEFORE

- ▶ Awareness and commitment
- ▶ Assessing potential
- ▶ Planning and negotiating
- ▶ Creating a supportive environment
- ▶ Briefing

FOR PREVIEW ONLY

OHP3

# COACHING SKILLS: DURING

- ▶ Explaining and demonstrating
- ▶ One-to-one instruction
- ▶ Monitoring

FOR PREVIEW ONLY



# COACHING SKILLS: AFTER

- ▶ Evaluating
- ▶ Debriefing

**FOR PREVIEW ONLY**

**OHP 5**