

# Good Coaching Practice Plan - Do - Review



If you are a Manager or Coach in the workplace, I am sure you spend a large proportion of your time coaching your staff, so that they feel empowered and engaged to create ideas and take ownership for finding solutions to their everyday challenges.

However, if you schedule a half an hour or hour long coaching session with a member of your team, how much time do you set aside for planning and then reviewing the coaching session?

Without effective planning, your coaching session is unlikely to be as effective as it should be and without the time set aside to review the impact of the session, how are you going to know what worked well, what didn't and what you are going to improve on next time? Without the review process in place, the chances are you will stay within your comfort zone and repeat the same process again next time. So, if something isn't quite working for your coachee or for you, you are unlikely to identify what needs to be changed and it may take a lot longer to start to see the individual achieving the results that you are both aiming for.

Follow the Plan-Do-Review process below and you will start to see a noticeable improvement in the quality of your coaching sessions

	What should you consider?	HOW will you achieve this?
<p><b>PLAN/ PREPARATION STAGE</b> (This should include what you need to do, how you need to do it and points to consider prior to conducting the coaching session)</p>	<ul style="list-style-type: none"> <li>• <b>What information have you reviewed and collated to understand that the individual is a high/under performer?</b> (Consider the data you have available to measure performance – call evaluations, customer satisfaction survey results, complaint logs, observation, feedback)</li> <li>• <b>What is going to be the focus of the coaching session and why?</b> – If this is the first coaching session – who will decide the focus of the session; you or the individual? If this is an ongoing session, have you reviewed previous coaching actions? If so, will this session be focused on recognising successes and acknowledging the achievement of the desired outcome? Or is the session going to be focused on identifying why actions haven't been followed through/ why progress hasn't been made?</li> <li>• <b>Do you know the individual's career aspirations?</b> If not, what do you need to do to find out what's important to them?</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule time in your calendar to collate the data and assess it. Allocate time during each week to observe your team's behaviours so that you are not just relying on reports</li> <li>• If this is the first meeting with the individual – Arrange a pre- coaching meeting with the individual to get know them and understand what's important to them. Complete a TNA in order to identify strengths and development Opportunities. If this is an ongoing session, where you will have to discuss reasons for actions not being completed – do not make assumptions or judgements which you then take with you into the coaching session. Prepare some open questions that you would like to ask the individual in order to fully understand the situation from their perspective</li> <li>• <b>Adapt your leadership/coaching style</b> A fully motivated and engaged individual welcomes ownership. Therefore ensure you are taking a full coaching approach which is focused on the use of primarily 'open' questions. The individual should have a lot of input into deciding outcomes required and areas to work on next. Has the individual's performance continued to fall? If so you may need to take the lead in the session by outlining the current situation and Outcome required. You may also need to consider if you are being too directive and therefore the individual is putting up resistance to your style. Or are you being too 'supportive' and need to take a more 'directive' approach?</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>What is your desired outcome of the session?</b> – Are you working with an individual who is fully motivated and committed to performance development or do you need to gain buy in? Perhaps you need to help the individual understand potential consequences of continual under-performance</li> <li>• <b>What do you need to consider about the meeting?</b></li> <li>• <b>What coaching questions will you introduce to stretch and challenge the individual?</b> – Mix of open and closed questions. Open questions will provide more information. Refer to Coaching questions document.</li> <li>• <b>Consider possible responses/reactions you may receive from the individual and what you will do if the best/worst case scenario happens</b></li> </ul>	<ul style="list-style-type: none"> <li>• Do you want the individual to be totally honest with you and feel comfortable sharing what may be affecting them outside of the workplace? If so then a coaching session at your desk, where the team can listen may not achieve the outcome you want. Do you want it to be a relaxed environment – perhaps grab a coffee and have an informal coaching session</li> <li>• Consider the most appropriate location, timing, required leadership/coaching style?</li> <li>• Have a mix of open, closed and probing questions. Refer to our coaching questions guide for useful questions that you may want to start introducing.</li> <li>• <b>If you have thought about potential responses in advance, then you are better placed to deal with them effectively when they happen.</b> Empathise, be assertive not aggressive, use probing questions to challenge existing values and beliefs. Focus on facts and avoid generalisations.</li> </ul>
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<p><b>DO STAGE</b> What good looks like</p>	<ul style="list-style-type: none"> <li>• <b>Engage the individual from the outset.</b></li> <li>• <b>Follow a structured approach to keep you on track – if this is a formal coaching session</b></li> <li>• <b>Ensure the discussion is balanced</b></li> <li>• <b>Discuss the gap between performance expectations and actual performance.</b> Ensure the individual understands how their performance has been measured and what the gap is between where they are now and what is expected of them.</li> <li>• <b>Always review previous coaching steps and progress made</b> – has there been improvement? If so provide recognition. If no or little improvement, then establish reasons for this.</li> </ul>	<ul style="list-style-type: none"> <li>• Explain the purpose for the session and start by asking the CSM how they are, what’s gone well for them, if you know their interests outside of work, show interest – ask them about their hobby etc. Ensure CSM is relaxed and understand the purpose of the sessions</li> <li>• <b>Try using a coaching model – such as ABIDE, GROW, OSCAR.</b> These models are aimed at establishing a goal/outcome, understanding what barriers are getting in the way and working through options in order to identify the next solution for the individual.</li> <li>• Don’t go straight into a discussion about development areas – focus on successes and what the individual has been proud of since the last session</li> <li>• <b>Don’t go into Tell mode by providing performance data and giving your thoughts.</b> Always ask the individual to tell you what the data is telling them about their performance including strengths and how they feel about their performance.</li> <li>• As you have completed the planning stage, you should know what the actions were and what impact they have had on performance. Again, don’t rush into Tell at this point. Encourage the individual to talk through what they have been working on and what difference it has made to them. If they can tell you then they are taking ownership and are engaged. If they struggle to tell you as they have forgotten, then this is a good indication that they are not fully committed to the process at this stage.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Does the individual need to listen to calls during the coaching session?</b> - How do you select these?</li> <li>• <b>Identify the root cause of the problem?</b> – Do not focus on figures such as AHT, as this is a result not the problem. Coaching should focus on behaviours</li> <li>• <b>Identify support needed</b> – is the CSM able to carry out agreed actions independently or is buddying/my support required?</li> <li>• <b>Identify actions needed to be taken</b> – These should be actions identified by the individual– therefore taking ownership. If you have suggested actions – have they been agreed?</li> </ul>	<ul style="list-style-type: none"> <li>• Call Listening – it is a good idea to have pre-prepared suitable calls for the individual to listen to which highlight improvement made or development areas which are linked to the performance objective that the individual is working on. If you take the gamble of randomly selecting calls during the session, then the calls chosen may not focus on the areas you want to discuss and you may find yourself talking about other development areas which will then create confusion for the individual i.e. why do they need to focus on another development area when they haven't achieved the outcome they want for the objective they were working on.</li> <li>• AHT will indicate there may be a development area but it won't tell you what that is. The only way to know this is through conversation with the individual and call listening. Never tell an individual to reduce their AHT and walk away!</li> <li>• If you have built a good rapport with the individual they should feel comfortable telling you if they are struggling or need support. Therefore, ensure you are focused on building a good relationship with your team</li> <li>• Encourage the individual to identify a minimum of two options and then work through pros and cons of each in order to decide which is the best course of action for them – not you! If you have offered suggestions have you worked through them with the individual, so they establish if the suggestion would work for them or if it needs tweaking?</li> </ul>
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	WHAT	HOW
<p><b>REVIEW STAGE</b> You need to consider what information needs to be reviewed immediately after the session and between sessions. Also consider how Your behaviour, knowledge and skills – can be improved</p>	<ul style="list-style-type: none"> <li>• <b>What outcome has been achieved?</b> Did this meet your requirements and those of the individual?</li> <li>• <b>What needs to happen next?</b> – What do you need to do to measure in terms of performance? If you have offered support, plan time for this to happen.</li> <li>• <b>What could you have done differently?</b> – Be honest with yourself – did you take the lead? Who did most of the talking? Did you build rapport? Ask the individual for regular feedback.</li> <li>• <b>What advice may you need to obtain and from whom?</b></li> <li>• <b>Consider the frequency of providing feedback to the individual – when and how will you do this?</b></li> <li>• <b>Make time for your next Plan-Do-Review</b></li> </ul>	<ul style="list-style-type: none"> <li>• By completing the planning and Doing stage effectively, you should know what outcomes were expected and how these would be measured. Always review your progress against the desired outcomes.</li> <li>• Plan in time to measure performance, such call listening or observations</li> <li>• <b>How will you improve the next 1-2-1?</b> Review your questioning and listening skills. Refer to coaching questions document to identify if you can use more effective and challenging questions next time. Ask for verbal or written feedback from team member</li> <li>• Is the under-performance continuing? Are you managing performance effectively? Do you need advice from your manager or HR?</li> <li>• Look out for changes in behaviour and provide prompt feedback so they know that you have taken the time to recognise their actions. If you can see no changes in behaviour – don't wait until the next coaching session to talk about it</li> <li>• Build this time into your weekly planning. If you don't plan, it won't happen!</li> </ul>