The Coach’s Toolkit

Workbook and Worksheets For Coaching Your Staff

HRwisdom

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Introduction

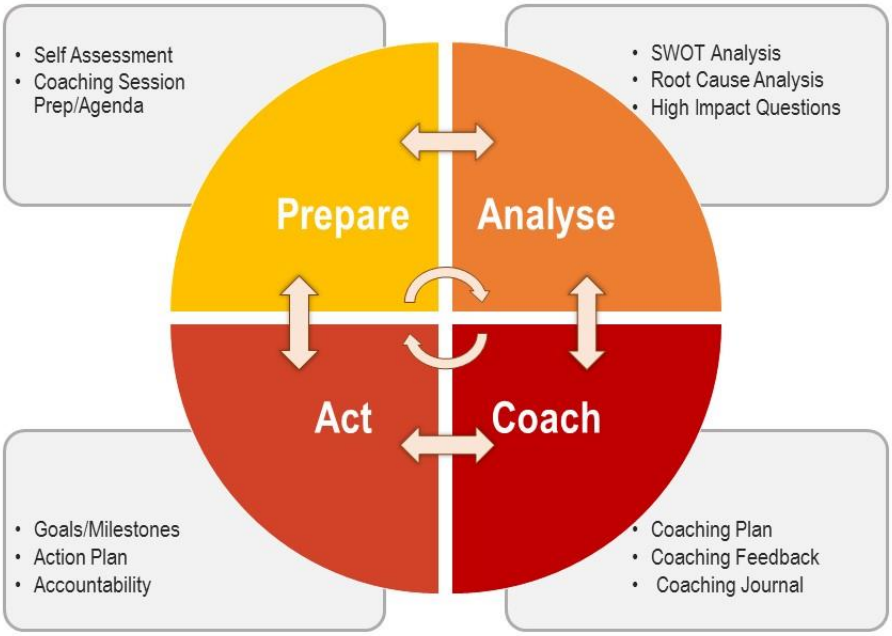
Whether you're just starting out as team leader, or you've been in management for a while, having a set of tools can make a big difference to your effectiveness.

In this report, you'll get a set of tools that cover each step of the coaching process to coach your employees – from initial preparation and meetings to final action plans.

The tools you'll learn to use are as follows, all of which are included in the Appendix to this report:

- Self-Assessment Worksheet
- Coaching Session Preparation Worksheet
- Individual Coaching Plan Template
- Coaching Feedback Worksheet
- Coaching Session Agenda Template
- SWOT Analysis Matrix
- Root Cause Analysis Worksheet
- High Impact Questions Worksheet
- Goal and Action Plan Template
- Coaching Journal
- Accountability Checklist

The graphic on the next page shows you how each tool can be used to accomplish the goals of each part of the coaching process.



Before you start using the tools, go through each chapter of the report to understand the importance of each step of the coaching process and how you can use the tools for success.

You don't have to use all the worksheets included in this toolkit. Pick and choose what you need. Your focus should always be on the success of your employees within your team or department as well as your company as a whole. With that attitude you can't go wrong.

What Your Employees Need to Do Before the First Coaching Session

To make the most out of your coaching sessions with your staff, it's important for them to perform an honest self-assessment before they even have their first session. They can't just walk in empty-handed or you'll waste time with basic questions. This is a bit of 'homework' they need to do in advance. In order to do a self-assessment, they need to ask themselves some questions about their role within your team or department, the company as a whole, their abilities and the coaching process itself.

Self-Assessment

Goals

Your employee needs to think of his or her goals within the company and how coaching might help them attain them. Find out what do they expect from coaching sessions. Once you understand where they are coming from, you can create clear expectations moving forward and determine the best approach to help them.

Challenges

When you need to coach one of your employees, there's almost always an obstacle they're trying to overcome. Their assessment needs to identify the obstacle, at least from their perspective, that's holding them back so you know how to frame your approach. If they are unable to identify an obstacle, or if they incorrectly identify the wrong challenge to their performance for whatever reason, you can help assess and discover their true challenges within the coaching sessions. Every employee is unique so don't expect every challenge assessment to be the same or accurate.

Strengths and Weaknesses

Your employee should think about and identify their strengths. What do they have going for them right now? What areas of their job are they performing well in? What are they particularly skilled at? They should explain what kind of progress they've been making against current goals and obstacles.

Likewise, they need to present their weaknesses within their role and as part of the team. Identifying areas where they're struggling or have failed in the past gives you a clearer idea of where to focus attention in your sessions. Where there's a skill lacking or an overwhelming obstacle, it could mean a need to improve performance or a reason to shift their direction within the company.

How to Move Forward

Ask your employee to brainstorm several ideas or identify one central idea they have for overcoming obstacles. You can then discuss this in your meetings where you can guide their decision making and development. Yes, you'll ultimately be directing their development during sessions, but getting them thinking about this beforehand will make your time together more productive.

Learning Style

You'll need to think about and discuss your employee's individual learning style. Make it clear what they should expect out of each session, including how you'd like to conduct the sessions and your expectations for structure and outside homework.

Questions

If your employee has questions pertaining to their job, their role on your team or the coaching process, have them come prepared with them to the first session. Tell them to think about their top 3 questions so that you can address any job specific or knowledge related obstacles before getting underway.

Preparing for the First Coaching Session

Always make sure to be up-to-date on what you need to know about your employees before beginning coaching sessions. It's not a waste of time to prepare for the coaching session because it ensures you are organised for each session and sets a good example for your employees.

Information You Need from Employees

Before the first session, gather and organise all of the documents you need. This includes the employee's completed self-assessment worksheet, an overview of their work background if needed, and their professional goals within the company. Take a few minutes before each session to review these documents to refresh your memory. If you're still relatively new at coaching, allow extra time for this.

Expectations for the Sessions

Discuss with the employee and outline realistic expectations for your sessions together. These expectations should include the amount of time for each session, a typical session agenda, and how you will communicate with them. Define specific outcomes that they will walk away with from your coaching sessions.

Anticipate Questions

Try to anticipate questions or concerns they may have. This shouldn't be rehearsed or scripted. Instead, write down a few questions you can imagine your employee asking and have answers prepared. When you're just starting out, try putting yourself in the employee's shoes and figuring out what you might ask.

Once you've been coaching for some time, these questions will be second nature because you'll have heard them over and over again. If the questions are generic to most of your staff, you can put all of them onto a FAQ on your company or team’s intranet site or other document sharing resources to save time during your coaching sessions.

Getting into the Zone

Before the session starts, make sure there will be no distractions. Put it on your scheduling software, have your calls held, use a meeting room free of the normal distractions at your desk, and do anything else needed to minimise interruptions. Prepare a system for taking notes during the session, either on paper or electronically. Some managers record their sessions so that they can go back later to hear exactly what was said. Encourage your employee to bring water, coffee, or anything else they might need and don’t forget one yourself.

Mentally prepare yourself and get into the zone. You can do this through some type of pre-session routine that gets you into a positive, social mood where you're ready to talk. You may try a grounding technique such as deep breathing. Whatever method you choose, remember that coaching sessions should be fun. Get into a state where you're enthusiastic and eager to help your employee break through their obstacles and achieve success.

Wrapping up

Finally, make a plan for wrapping up your sessions. You need to stick closely to the time schedule you create, but the end of the session should be smooth and natural, not abrupt. It can discourage your employees if you terminate the sessions suddenly. You may want to designate the last five minutes of the session as a cooling down, questions, and review period. This is a good time to lay out expectations for your next session.

The First Coaching Session – Creating an Individualised Coaching Plan

The main goal of your first coaching session is to create a plan for all of the sessions that will follow. It establishes a form of contract between you and your employee where you are a coach to help them succeed, not just their boss that they report to. This first session is also referred to as an 'intake' session. Here you can 'intake' any new information you need to know about your employee pertaining to your new role as their coach and additionally allow them to 'intake' any new information about you to help them adjust to your newly expanded role in their professional development.

Self-Assessment Worksheet

The main part of this consultation is to walk through your employee's self-assessment worksheet with them. Go through each item asking questions for clarification. Most importantly, clarify the goals of these coaching sessions. If they are too vague or unrealistic, it may inhibit them from being achievable for your employee.

Responsibilities and Expectations

Define the responsibilities of your employee and yourself as coach. In any type of coaching, the one being coached and the coach are equal partners. There's no such thing as coaching sessions where the coach simply solves employees' problems for them. There is work for both sides to perform, and this includes 'homework' that needs to be done outside of the sessions. Lay out the expectations for both of you. Establish ground rules in case they fall behind or fail to carry out their responsibilities.

Measuring Progress

Your employees need to see how they're improving to stay motivated in coaching sessions. There needs to be some solid way to measure this. It could be an analytic such as KPIs or sales, or it could be the steps completed in a large-scale project. During your initial consultation, decide how progress will be measured.

Session Details

At some point during the consultation, go over the specifics of your coaching sessions. Let your employees know how long each session will be, how often you'll meet, and how you'll communicate (by email, intranet, or another method).

Be Flexible

Decide all of these details and put them in writing, but don't be completely rigid. It's best to stick to the plan as closely as possible, but if circumstances or the company's business needs change you may need to revisit your coaching plan and make amendments.

How to Run an Effective Coaching Session

Coaching takes a great deal of preparation and outside work, but the most important things will get done during the coaching session itself. In order to make them worth your time as well as your company's money, your coaching sessions need to be as efficient and focused as possible. A time will come when all of this is second nature, but when you're just starting out as a coach, it takes some conscious effort to run good coaching sessions.

Create an Agenda

Every good coaching session has an agenda. Coaches don't just improvise. The exact structure of your agenda is something you may want to discuss with your employees before the first session. An agenda defines the basic flow of each session. An example would be:

- Warm up / opening discussion questions (to get your employee thinking about today's topic)
- Summary of issues from last sessions / review of progress / questions from the employee
- Discussion on how to move forward
- Defining next action steps
- Cooling down and preparing for next session (including confirming day and time)

Each coach has a slightly different agenda template and one reason it's helpful to take a coaching session yourself is to see how an experienced coach does this. You can use your personal coaching experience to create your own agenda template.

Opening

Keep it short, but make sure that each session has a minute or two where you can simply chat with your employee and catch up. The point is to build rapport and get both of you into the zone for the session. Many managers use this chatty introduction to get their employees ready for today's topic. They may give them an opening question to get them thinking about today's topic. The most important thing is to create a level of comfort.

Review of Progress

Reviewing your employee's progress is extremely important. At some point during the session, you should discuss with them the objectives and action steps from the last session and follow up with them on what progress they're making with these. Aside from telling you what they did and how they felt about it, they should provide some concrete data to demonstrate this progress. This could be anything specifically related to their role, your department, company or specific business sector.

Questions and Challenges

Most managers help their employees identify what challenges they're facing or what areas they need particular help with. An employee may not clearly understand these themselves, so you may have to draw it out of them. They may be aware things aren't going well but not be sure why.

Feedback

Provide your employee feedback by focusing on what they've done well and what needs work. Whenever you discuss what they're doing, it's good to ask them first before giving them direction. Ask questions such as, "Why do you think that's happening?" or "What ideas have you already considered for dealing with that?" You should then give your opinions on their ideas, which ones you think would work, and any ideas of your own. Give constructive suggestions and follow them up by confirming with the employee. Ask them to repeat back to you what they need to do so that you're sure they understand.

Next Steps and Agreed Actions

The result of your suggestions should be clearly defined action steps that your employee needs to take. The two of you should agree on these together. This gives them a roadmap to follow for the next session. There may be action steps for you as the coach to take as well.

Working Together Toward a Common Goal

Don't think of yourself as telling your employees what to do when you coach. Rather, you are working together to discover the right course of action. What you bring to the table is your experience and knowledge as their supervisor and someone further along in their career. Always try to focus on the positives and the progress your employee is making. As they struggle to move forward with their performance, they often lose sight of the progress they've made and become discouraged.

How to Do a SWOT Analysis

A SWOT analysis is a tool used by both corporations and individuals to form the big picture of a situation and assess which direction to take in solving problems or reaching a goal. On an individual level, a SWOT analysis takes a goal and analyses a person's skills and external factors to determine which factors are favorable or unfavorable to them or their goal. This is something you should do with your employee early in your coaching sessions or possibly as part of the initial self-assessment.

SWOT stands for Strengths, Weaknesses, Opportunities and Threats.

S – Strengths

Strengths can be both personal and business strengths, depending on the situation you're analysing. These are things that are going well currently where your employee is key to your team or department's current success. They include things like their individual skills, the value they add to your team, their good reputation within the company, and so on. They also include personal strengths and natural abilities the employee now possesses.

W – Weaknesses

Weaknesses are areas in which your employee needs improvement. These may be situations where their performance is struggling or obstacles are holding them back from achieving their team goals and KPIs. They might be skills that are lacking or things the employee wants to change about their current situation. These are issues that could hold the employee back within the company and their career.

O – Opportunities

Opportunities are things your employees can take advantage of. They could be new positions within the company, technologies to learn, skills to develop, or unfilled business needs that they can address. Opportunities are external factors that can help your employees improve their position within your team, department, or company.

T – Threats

Threats are external challenges or obstacles that your employee is facing. These could be financial problems, job performance issues, conflicts with other team members, core competency issues, or threats to personal stability. These external obstacles make it harder for employees to perform to the same level of their coworkers.

Once all of these areas of the SWOT are identified, you can examine them in relation to the goals of your coaching sessions. It becomes evident which areas will be most challenging and which are most favorable. You can then create a plan to move forward that strengthens the weak points and mitigates challenges.

The SWOT tool helps you create a roadmap for success for your employees. Although it's often used in such business settings to assess and work on employee skills, the SWOT approach can be used for anything. It doesn't even have to be business related. Employees can use the SWOT analysis for personal goals and challenges as well.

A SWOT analysis is one of the best tools for brainstorming solutions. Use it early in your coaching sessions to address your employee's most urgent performance needs. However, you may also choose to do one periodically during the course of your sessions as well, especially if any external or internal factors change.

Root Cause Analysis – Asking Why

When we tackle problems in business or personal life, we have a tendency to go after symptoms and not root causes. Root Cause Analysis is a method used to figure out the underlying reasons for a problem. However, it's not used only when there is a problem or challenge, but also when thing are going well. When your business is strong, it's good to discover the source of this strength so that you can repeat or reinforce it.

A Root Cause Analysis is based on asking 'why' multiple times until you discover the source.

Getting to the Bottom of It

Root Cause Analysis starts with identifying the problem or challenge. An example of a challenge could be that your employee has failed to meet productivity standards over the past three months. Ask the employee why this is so and keep asking why until you get to the root cause.

To take the above example of the employee trying to increase productivity, an analysis might go something like this:

- Why didn't I hit my performance goals? Because I didn't know which strategy would work best
- Why didn't I know what strategy to use? Because I haven't tried enough different ones
- Why haven't I tried different ones? Because I've been focusing my time on one part of product creation
- Why have I focused on this one part of product creation? Because I don't trust other employees to do it well

- Why don't I trust others to do it? Because they don't have my experience
- Why don't they have my experience? Because I never trust them enough to let them help me

When you finally reach the root cause, a solution presents itself to you. In this example, the solution would be to overcome the employee's trust issue by setting up a reliable process for allowing the transfer of his or her particular skill set. Overcoming trust issues may entail things like establishing better standards of communication within your team or department, setting specific quality standards, and effectively training new employees before gaps in knowledge like this can start to cause performance issues.

Many Different Approaches

In Root Cause Analysis, the solution isn't always to remove the root cause. It may be that a slight change somewhere along the way would produce the desired outcome or remove the obstacle. The important thing in Root Cause Analysis is to see the process of cause and effect playing out. You then know which factors can be changed to affect other factors.

Visual Representation

It helps a great deal to diagram your analysis and visually represent it. Your employee can then easily see how each factor affects each other. In the above example, they may choose to focus less on this specific job responsibility once new staff members are adequately trained. They can then devote their efforts to the other parts of their job that have suffered and caused them to be unable to improve performance.

In addition to using Root Cause Analysis in your coaching sessions, you can also teach employees how to do it on their own. This is a valuable business skill that everyone should have and it can also be used for problems in your personal life.

The Power of High Impact Questions

High impact questions are questions that make a person think more deeply about an issue. Closed-ended questions result in a yes or no and often don't get any deeper than that. Open-ended questions can solve problems, but they may also just generate a list of options or ideas. High impact questions get the employee out of their set way of thinking to present problems to them with an urgency that leads them to take action. They deal in the here and now.

The Elements of a High Impact Question

The elements that lend this impact to a question are:

- It's simple and direct, dealing in reality instead of speculation
- It encourages creative thinking and thinking at a deeper level
- It encourages self-reflection

High impact questions get employees closer to attaining a goal or solving a problem. They get things done by dealing not in 'why,' but in 'what' and 'how.'

Which One Do You Choose?

You can take any question and turn it into a high impact question by simply wording it differently and seeking a different answer. Imagine, for example, if you'd like to ask your employee, 'What tasks would you like to move off of your plate?' An alternative high impact question that asks essentially the same thing would be, 'If you could move just one task off of your plate today, what would it be?'

In the original question, you're asking something in the realm of imagination and ideas. The 'would like' of the question places it in the abstract. What you're doing with the second question is asking them to make a clear decision – which *one* would they take off their plate? You also put a time marker on it by asking them which they'd choose *today*. It becomes more urgent and real, and the question's answer leads directly to an action step – getting that task off their plate.

This is a priority question and can be used for anything at all to get effective answers. You can ask employees which one thing they'd change about their job or which one new tool they'd like to have. This forces them to choose one top priority, and that's the first step of taking action when you have many options.

Picture Yourself...

Here's another example. Instead of asking your employee, 'Where do you see yourself within the company in five years?' ask them instead, 'Imagine that it's five years from now. What does your role here look like on a day to day basis?' With this example also, we're not asking them what it 'would' be like. Even though we're using our imagination and picturing the future, you make it more real and immediate by saying 'what does your role here look like,' as if you were living it right now.

This is more likely to produce answers that are clear and specific. Instead of saying, 'I'd have been promoted hopefully,' they may say something like, 'I don't do data entry anymore. Instead, I'm working with the development team.' They've just defined a goal – moving out of data entry into software development.

Part 2 – Listening

Turning regular questions into high impact questions that elicit clear actionable answers is only the first step. As a coach, you also need to listen to their answers closely and use them to guide your employees toward those action steps. Don't judge their answer on whether it's wise or unwise, but rather on whether or not it comes from a genuine place. The whole point of high impact questions is to get them into the zone of thinking more deeply about their problems and challenges.

Tips for Helping Employees Set Priorities and Create Action Plans

Your most important job as a coach is to help your employees prioritise and start taking action on the things they need to do to improve their job performance. You have to help them not only discover what needs to be done, but also get started doing it. This is how they get closer to their goal and when the employee succeeds, you do as well – both as their manager and their coach. When they see benefits, their performance improves, other employees notice, and the benefits start to catch on.

The Biggest First

The employee's first priority should be the biggest project or goal of their position. It's usually not hard for employees to name this. However, if they're struggling you can use Root Cause Analysis, high impact questions and other methods to help them uncover their most significant responsibility. This is particularly helpful when coaching an employee you are not as familiar with or who is on someone else's team. Sometimes it's just a matter of making a list of priorities and choosing the biggest. Ask them, 'If you could only get one thing done here each day, what does it have to be?'

Breaking it down

Once you've identified the biggest project and/or goal, break it down into sub-goals. These are milestones along the way that will get the employee closer to their ultimate goal. Each of these milestones is then broken down into clear action steps. These are things your employee can *do* on a daily basis to reach their sub-goals and eventually big goals. If an action step or milestone seems too big, break it up further until you have a list of daily tasks.

Work Backward

There will often be certain tasks that need to be accomplished before others. In this case, these preliminary tasks should be given priority. For example, a database needs to be properly setup and filled with at least a little data before you allow your team to query it from your company’s intranet site. What can they query from the database if there is no data in it? Put all of the tasks for a particular milestone into chronological order.

Timing Is Everything

Big goals are hard to reach because they operate on a different time scale than we do. We need to be able to see the attainment of these goals day by day, or even hour by hour. Each step along the way toward a goal should have a timeline.

Timelines give your employee a realistic deadline in which to finish tasks and reach milestones. Although your employee will want to move forward as quickly as possible, they may need to curb their enthusiasm. It's important that timelines be realistic. Otherwise, your employee will fall behind. Set reasonable deadlines and allow for some flexibility if tasks take too long or are finished quickly.

Allowing for Change

There may be changes in strategy along the way as you and your employee discover what works for them and what doesn't. It's okay to make whatever changes are necessary as long as goals remain clearly defined. Timelines, small tasks, action steps, and milestones can be shifted, but keep major goals in place.

Tips for Taking Action – How You Can Coach Your Employees to Succeed

In the course of your coaching sessions, both you and your employee have actions steps to take. You need to be committed and accountable to your employee, both to ensure you are helping them and to properly model how seriously they should take development within your department or company. Therefore, always ensure you complete tasks that the coach must complete between coaching sessions and require that your employees do the same.

Employee-Generated Steps

The action steps created in your sessions work best if they're employee-generated. If you lay out a plan and tell them what to do, they're far less likely to actually be motivated to do it than if they've been given some choice in those steps themselves. Yes, you are their boss, but you're also a coach with years of experience and knowledge your employee lacks. Ask for their ideas first and then help them modify those steps as needed. Give your employees a voice in this process to help them take more ownership of their professional development.

Verbalise It

When your employee puts forth an idea of something they should do and you recognise it as a suitable action step, ask them something like, 'Is that the step you want to take?' They should then say back to you, 'Yes, I would like to do this.' What this does is take an idea and turn it into a task to be carried out. Verbalising the task solidifies it in your employee's mind and makes them visualise getting it done.

All action steps for both you and the employee should be written down. Ensure they have access to a copy of these notes after the sessions as well.

Little Reminders

It may be a good idea to set up a reminder system. Your employee may get busy with their normal job and forget that they also have a coaching session. It's easy for employees to get overwhelmed by their pressing responsibilities. This is especially true when they are in a situation you've already identified as a coaching opportunity. A friendly reminder to reconfirm the details of what needs to be done and when you are next scheduled to meet can go a long way in helping your coaching efforts be successful. You may even want to set up an email autoresponder to do this and include daily motivation tips or inspirational quotes to help them stay motivated.

Getting Stuck

Create a plan for how to deal with challenges if an employee gets stuck on a task. You might agree on a certain number of out-of-session coaching emails they can send you with questions. Outline clearly how to contact you as their coach when you are outside of the session as you are also their boss. If what they are stuck on is not critical to their role, you can ask them to move on to something else and return to this issue in the next session. When scheduling multiple employees concurrently for individual coaching sessions, keep in mind the amount of time each may need from you between sessions as a coach and prepare guidelines accordingly.

Encouraging but Firm

Be firm about these action steps. Remember that when your employees take action and work toward their goals, this empowers them. Failing to do so hurts both your team’s performance and their individual ability to attain their goals. Make sure your employee understands that if you're strict, it's for their own good. Be firm as great coaches are when they want their team to succeed.

Reward and Acknowledge

Whenever an employee completes an action step or sub-goal, give them praise and acknowledgement. People have to be shown the progress they're making. Hold mini-celebrations if the goal is significant or simply send an email that says, 'I just wanted to let you know you did a great job!' This keeps their commitment strong and builds confidence.

No Shoulds or Oughts

Whenever communicating with employees, avoid equivocal language or words such as 'should' or 'ought.' Replace them with decisive words like 'will.' Instead of 'what should I do to increase productivity' they should ask 'what *will* I do.' This is a small detail but it has a powerful psychological effect.

After the Coaching Ends – Maintaining Momentum

Once your coaching sessions with an employee are over, they are far from finished. The goal of your coaching is not just to help them overcome a challenge or reach short-term goals. It is also to foster in them lifelong skills they can use to continue to improve their performance and move up within the company. There are concrete methods you can use to do this.

A Long-Term Action Plan

By your last session with the employee, they should have a long-term action plan. Walk through it together during the last session. Their action plan should include agreed upon goals and deadlines, areas to focus on and how to improve these areas, strategies and plans, resources they can use in the future, and any other specific actions they need to take.

Be Your Own Coach

During the course of your coaching, teach your employees how to use the methods you're using for themselves. Root Cause Analysis, SWOT analysis, high impact questions, and many of the other techniques coaches employ can be used by anyone. As long as you're willing to be honest with yourself, you can use these tools to further your business or personal goals. Encourage your employees to continue the habit of self-analysis and point them toward resources that will make them more self-sufficient.

Establishing Accountability

One of the most important things you've done for your employee during your coaching sessions is to provide them with accountability. They have to do what they say because you're going to be following up. When you're no longer having coaching sessions with them, check in with them every so often to be an ‘accountability partner’.

All you need to do is check in with your employee periodically to see how they're doing and whether or not they're acting in accordance with the plan. You do not have to coach much at all, but simply be there. As their boss, you may also choose to connect them with other employees you have coached to be accountability partners or point them to other resources where they can easily find accountability instead.

A Space for Your Employees

You may choose to create a place where all of the employees you coach can hang out and help each other. You could form an intranet page or coaching forum where they can all support each other. It's good to have a separate virtual or real space where present and past employees you have coached can have access to resources in case they get stuck. This can also save you time as it facilitates the continuation of the coaching process between your employees themselves.

Expectations and Results

At the end of your coaching sessions with an employee, it's important to review the process and decide how well they attained their goals. This reflection is important and will allow both of you to pursue future endeavors more successfully. As mentioned before, it's also good to occasionally follow up with employees you’ve coached in the past to see how they're doing.

Conclusion

Coaching your employees can be rewarding both personally and in terms of your team's performance on the job. Employees changing their attitude and work performance for the better can foster the right kind of change to your team or organisation's culture. Knowing you had a hand in this brings satisfaction, excitement, and all the business advantages that come along with such improvements in performance.

In this toolkit, we've covered each stage of the coaching process that will enable you to help your employees make the changes they need in order to achieve success on your team and within your organisation. You'll be able to:

- Prepare employees for coaching
- Prepare yourself for coaching sessions
- Conduct effective coaching sessions
- Create realistic action plans
- Motivate your employees to take action
- Ensure continued progress after sessions end

Keep the worksheets in the Coach's Toolkit handy, make copies, and review the report from time to time to refresh your memory.

Good luck on your coaching journey!

Appendix: Your Coaching Toolkit Worksheets

On the following pages, you'll find worksheets for all of the coaching steps referred to in this report.

Self-Assessment Worksheet

1. **What are your main goals for your coaching sessions, in priority order? What do you hope to get out of your coaching sessions?**

2. **What challenges do you face? What is most difficult for you right now?**

3. **What are your 3 biggest strengths?**

Self-Assessment Worksheet (continued)

4. **What are your 3 main weaknesses?**

5. **What ideas do you have for moving forward? (Your coach will review these and offer suggestions)**

6. **What is your preferred learning style? I.e., do you prefer to see, hear or read in order to learn best?**

Self-Assessment Worksheet (continued)

7. **Do you have any ideas on how you'd like coaching sessions conducted? Describe your ideal coaching session.**

8. **Please write any questions or concerns you have.**

Coaching Session Checklist

Before Session

☐ **Gather all relevant information from employee**

☐ **Review employee's information on the Self-Assessment Worksheet**

☐ **Eliminate/minimise distractions / book meeting room**

☐ **Note-taking materials / recording**

☐ **Mental preparation**

☐ ______________________________

☐ ______________________________

☐ ______________________________

During Session

☐ **Allotted time for each session**

☐ **Schedule**

☐ **Outcomes employee hopes to achieve**

☐ **Employee questions and concerns**

☐ ______________________________

☐ ______________________________

☐ ______________________________

Wrapping up

☐ **Review / summary**

☐ **Action steps**

☐ **Confirm next session time**

☐ **Other preparations for next session**

☐ **Questions and concerns**

☐ ______________________________

☐ ______________________________

Individual Coaching Plan Worksheet

General Information

Employee Name:

Contact Details:

Session Plan:

Total No. of Sessions:

Frequency of Sessions:

Session Day/Time:

Communication Methods:

Session Details

Employee's goals and expectations:

Method for measuring progress:

Session Details (continued)

Preferred learning style:

Special employee concerns:

Homework / pre-session planning for you to do:

Ideas for session contents:

Coaching Feedback Worksheet

Employee name/date:

Progress made:

(Specific progress made toward goal since last session)

Areas that need improvement:

(Specific areas where the employee isn't making progress)

Other:

(Any other relevant feedback)

Action Steps:

(What steps to take to address areas for improvement and/or to reinforce progress?)

Coaching Session Agenda

Employee Name:

*(*Describe each element, its purpose, and an approximate length of time)*

Agenda Item	Time (00:00 to 00:00, x minutes)
Greetings	
Element 1	
Element 2	
Element 3	
Element 4	
Element 5	
Wrap-up/Next Steps	

**Your session agenda doesn't need 5 elements; keep blank or X out those you don't use*

SWOT Matrix

Strengths	**Weaknesses**
**What strengths, skills, abilities, advantages, and resources do you now have that make you good at your job?*	**What challenges, lack of skills, obstacles or needs do you now have that inhibit your job performance?*

Opportunities	Threats
**What new skills, positions, technologies, or currently unfilled business needs within the company are you interested in pursuing?*	**What potential problems do you now face that negatively affect your job performance?*

Root Cause Analysis Worksheet

Problem:

Answer 1

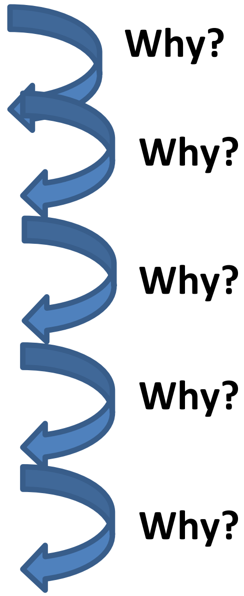
Answer 2

Answer 3

Answer 4

Answer 5

Root Cause



Solutions

** You don't have to stop at "5" whys. Just continue on to another page until you get to the root cause. It may not even take 5 to get you there.*

High Impact Question Worksheet

**Prepare open-ended questions to use in your coaching sessions. Brainstorm ones that will make your employees really think about their job performance, goals, purpose, motivations, challenges, or any other issues that you typically address in your sessions.*

Topic/Issue	Questions for Coaching Sessions
(E.g., Time Management)	*(E.g., 'If you could move just one task off of your plate today, what would it be?')*

Goal and Milestones Worksheet

Primary Goal: *Define goal as specifically as possible*	Deadline:
How will you measure your success?	
What specific milestones are needed to reach your goal?	**Milestone 1:** Deadline: **Milestone 2:** Deadline: **Milestone 3:** Deadline: **Milestone 4:** Deadline:

Action Plan Template

Milestone**:** *What do you need to complete first to reach your goal?*	 Deadline:
How will you measure your success?	
What specific action steps are needed to reach this milestone?	**Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline:

Action Plan Template (continued)

Milestone: *What do you need to complete next to reach your goal?*	Deadline:
How will you measure your success?	
What specific action steps are needed to reach this milestone?	**Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline:

Action Plan Template (continued)

Milestone: *What do you need to complete next to reach your goal?*	Deadline:
How will you measure your success?	
What specific action steps are needed to reach this milestone?	**Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline:

Action Plan Template (continued)

Milestone: *What do you need to complete next to reach your goal?*	Deadline:
How will you measure your success?	

What specific action steps are needed to reach this milestone?	**Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline: **Action step:** Deadline:

Accountability plan

Goals

Original Goals:

Goals Achieved:

Next Goals and/or Milestones:

Strategy

The Big Three:

What are your top 3 strategies for reaching your goals?

Next Steps

Priorities to Focus On:

These can be strategies, behaviors, actions or other important items that came out of the coaching and review of your progress.

Action Steps:

What are the key actions you are going to take next to continue to work towards your goals? Put them in priority order.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Resources

Where to get help:

This could include forums, a section of your company's intranet site, or other internal resources they should access when they have a question.

Essential Resources

If these topics interest you, you'll definitely want to check out more at HRwisdom.com.au