TEN TIPS FOR IMPROVING YOUR COACHING SESSION

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Overview

Coaching sessions can be difficult for everyone involved because they require judgment and evaluation. In an ideal situation, there wouldn’t be any surprises at these coaching meetings because the expectations and objectives are clearly laid out in advance (e.g., employees know exactly how they would be evaluated and can do a self-assessment before coming in). However, this is seldom the case; so the employee approaches the meeting with trepidation. At the same time, the supervisor/manager/coach may be apprehensive about delivering bad news for fear that the employee will react poorly (with some combination of denial, frustration, anger, or defensiveness). As a consequence, both parties dread the meetings and then fail to capitalize on the experience.

This checklist helps the supervisor prepare for and organize the meeting so that there can be a useful outcome and the stage is set for the next meeting. Over time, using this methodology decreases the stress levels for both parties and creates a partnership.
COACHING SESSION CHECKLIST

This checklist is designed to help you prepare for a successful coaching session. The list is not exhaustive, but rather focuses on the key elements needed to make the session productive and effective.

The ten steps to be used during the meeting may not always appear in order or apply to your given situation. Choose those elements that can assist you in:

- Conveying your message.
- Reaching an understanding with the employee.
- Developing an action plan to resolve the issue.
- Measuring success.

Preparing for the Meeting

1. Make an outline for yourself of all the critical issues that you want to discuss.
2. Prioritize the critical issues. If you discuss too many, the employee will be overwhelmed.
3. Make notes of specific behaviors that you can use to illustrate your points (e.g., specific examples of missing deadlines or coming to work late).
4. Be prepared to offer suggestions or solutions to the problem if the employee is unable to generate them on his/her own.

During the Meeting

1. Build rapport. Ask simple questions to break the ice before getting down to business.
2. Ask open-ended questions (not yes/no) to learn more about the situation and to get the employee’s perspective. This often helps you uncover additional and critical information.
3. Be an active listener. Be sure to paraphrase and summarize what you heard the employee say. This avoids misunderstandings later.
4. Clearly state your interpretation of the situation, using specific data to illustrate your point (production data, absenteeism records, etc.). Avoid making judgments. Focus on the behavior, not on the person. Rather than saying, “You are lazy and inconsiderate,” give the employee the facts: “You were late three times last month.”

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5. Explain the impact of the employee’s performance on others’ ability to do their jobs. For example, “When you don’t complete your assignments on time, it prevents the analysts from getting the information they need for their calculations, which causes delays in the project. Those delays interfere with the manager’s ability to make decisions in a timely manner and can result in us losing contracts worth millions of dollars.”

6. Clearly explain your expectations, without hedging or backing down. For example, “I expect you to be at your work station on time. More than one tardy per month is unacceptable” is more effective than “Could you maybe try to be on time more often?”

7. Get the employee’s input on how to resolve the issues. Do not impose a solution or goal on the employee except as a last resort. Employees resent it and are less committed to making it work. For example, “What steps can you take to make sure your reports are completed on time?”

8. Working together, set a specific, reasonable goal. For example, “Increase the number of sales calls you make each day by ten percent,” rather than “Do better” or “Work faster.”

9. Put an action plan together that outlines the steps needed to reach the goal. The action plan should include: due dates, who will do what, and scheduled meetings to check on progress and offer additional assistance, if necessary.

10. Summarize what went on at the meeting. Make sure that you both have an understanding of what will happen next. Ask the employee to repeat what the two of you have agreed to.

After the Meeting

1. Document the meeting. Keep any notes on file to show what you discussed. Follow through on any promises you made in the meeting (e.g., scheduling training, removing obstacles, providing resources).

2. Monitor the employee’s progress at the agreed-upon follow-up meetings. Offer any additional assistance, support, or advice.

3. Recognize and reward successes (in public or privately, depending on the employee’s preference, not your preference).

4. Tackle additional development needs that were lower priorities.

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