



A Coaching Conversation Checklist for Smart Managers

In spite of wide-spread coach training, most of the time managers aren't using coaching skills to grow and develop their people. Instead, many managers still believe in their role as a problem solver, cutting short conversations with employees by providing solutions, advice, and answers.

Yet managers with a coaching style usually find that their employees are more committed, willing to put in greater effort, and are less likely to leave.

"Clearly, the benefits of building a coaching culture and increasing the effectiveness of coaching are great. There are both tangible benefits (increased employee engagement and productivity) and intangible benefits (improved culture and finding meaning and purpose in work)." ~ John H. Zenger and Kathleen Stinnett, *The Extraordinary Coach: How the Best Leaders Help Others Grow*, McGraw-Hill, 2010

In spite of learning coaching skills, many managers struggle to have effective coaching conversations that lead to insights and change. A checklist for coaching conversations can help.

Zenger and Stinnett suggest using the FUEL model in *The Extraordinary Coach*:

- **F = Frame the Conversation.** Set the context by agreeing on the discussion's purpose, process, and desired outcome.
- **U = Understand the Current State.** Explore the current state from the coachee's point of view. Expand the coachee's awareness of the situation to determine the real coaching issue.
- **E = Explore the Desired State.** Help the coachee to articulate a vision of success in this scenario. Explore multiple alternative paths before prioritizing methods of achieving this vision.
- **L = Lay Out a Success Plan.** Identify the specific, time-bounded action steps to be taken to achieve

A Message from Nancy...

Let me ask you:

- Are the people on your team engaged and committed or just collecting a pay check?
- Do you have the right people in the right seat on the bus? Are *you* in the right seat?
- Is the high cost of turnover eating away your organization's bottom-line?
- Are your processes and procedures (or lack thereof) delivering productive and efficient results?
- How comfortable are the members of your senior team managing and leading others?



In today's highly competitive environment, it's no surprise that "*what got you here may not get you there.*"

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the desired results. Determine milestones for follow-up and accountability.

Step 1: Frame the Coaching Conversation

It's not always that managers don't know how to coach; it's that conversations with employees often turn into project task updates instead of furthering their growth and development.

In spite of good intentions, managers don't use a checklist to remind them how to set up a coaching dialogue. From the book by Zenger and Stinnett, *The Extraordinary Coach*, there are three steps that work well for initiating a developmental dialogue.

1. **Identify the behavior or issue to discuss.** "I'd like to talk about [the issue]..."
2. **Determine the purpose or outcomes of the conversation.** "By the end of this conversation, I would like to accomplish..." "What else would you like to make sure that we address?"
3. **Agree on the process for the conversation.** "Here's how I thought we could proceed..." "How does that sound?"

This sounds almost too simple to bother with, but without it, employees aren't clear about what the issues are and how they can use them to grow and develop.

Whether the manager or the coachee initiates the conversation and brings up the topic isn't as important as setting up the conversation and clarifying what's going to be discussed, what outcomes are intended, and how the conversation will proceed. These three steps will save the manager from needing to have the same conversation twice.

Step 2: Understanding Leads to Insights

The next step in a coaching conversation is to address the "meat" of the issue. Managers need to understand what's going on. This part can be tricky because of our natural tendency to assume we understand what the issues are. We fill in the blanks and automatically judge, usually prematurely.

Instead, a manager needs to listen well and encourage the coachee to talk. Explore what the real challenge is for her. Be curious about what is said or merely implied. Follow emotional cues.

Here are some great pointers from the Zenger and Stinnett book.

Do:

- Ask open-ended, non-leading questions

- Act as a mirror, observe, and say what you hear and see
- Follow up on emotionally charged words or expressions
- Explore what the real issue or challenge is
- Discuss consequences in the event things don't change

Don't:

- Assume anything
- Judge, criticize, or categorize
- Ask for too many details or focus on other people
- Let the person obsess or ruminate; rather let her explore possibilities
- Offer your perspective or advice until the person has explored options
- Find an answer for the person; let him discover insight and awareness

People won't change until they experience a need to change, and if a manager is too helpful, the coachee won't feel enough tension to be motivated to change. Keep the focus on them and what they need—and are willing to do differently.

Step 3: Explore Desired Outcomes

Typically in most companies, managers are excellent problem-fixers and advice-givers. They want to jump in at Step 3. Many tend to skip over Steps 1 and 2, because managers have a bias for action. They may be more comfortable when they solve a problem quickly and influence action from others.

But that is a big trap. Instead of pouncing on the first viable solution, it's worthwhile to explore alternatives. Managers can show their people how to think things through so that the right target becomes the objective. It's important to let the coachee do most of the talking to find what matters most to her. If the employee's vision is too small, the manager can help her explore broader objectives.

Here are some tips on this part of the coaching conversation:

- Don't rush into problem solving; create the ideal vision and generate more alternatives for achieving that vision.
- Do resist the tendency to go with the first option.
- As the manager, you can negotiate and influence what the measures of success must include.
- If the coachee comes up with at least three

alternatives to consider, he or she will end up with a more robust and effective solution.

- If the coachee gets stuck, offer to become a brainstorming partner.
- Explore possible barriers and look for alternatives.

Step 4: Lay Out a Success Plan

This is the home stretch in a coaching conversation and, like the previous steps, should not be rushed or skimmed over. Presumably, by now you have outlined the desired vision of success as well as several alternatives for getting there. You've prioritized the options that will work best. Now you are ready to dive into the specific detailed action steps with a follow-up plan.

The role of the manager is critical here, as a guide. You help the coachee identify the specific actions to be taken. You help the coachee enlist the support of others. You need to hear the coachee articulate exactly how he or she will proceed to increase the likelihood that it will happen. Also, you help the coachee commit to timelines for important milestones.

By assigning accountability, you will help your coachee change faster than without it. Even if 85 percent of coachees complete their assignments on the day or morning before their next coaching meeting, it is still effective.

Here are the three sub steps of this final coaching conversation:

1. Develop and agree on an action plan with timelines.
2. Enlist support from others.
3. Set milestones for follow-up and accountability.

The key role of the manager is to ask for details, clarity, and commitment. This is how managers add value to the coaching conversation. Accountability works, and it works better when there is consistent follow-up.

Managers Ask Coachees for Feedback

Research suggests that when the coachee can provide feedback to the manager on the value of the session, the quality and relevance of the session is significantly increased. But few managers remember to ask for feedback. One possible way to conclude a coaching conversation would be like this:

“On a scale of one to five, how valuable was this conversation with regard to providing relevant help for you?”

Why Bother with Coaching Conversations?

Without going in to all the statistical ROI studies on the benefits of coaching, let's look at the benefits of coaching as a managerial style. Why bother with coaching conversations?

1. **Coaching gives new meaning to work.** When people feel that they are engaged in a useful cause and not merely performing menial tasks, they have more energy and motivation and will go beyond minimal requirements. Coaching provides managers opportunities to link each person's job to the overall mission of the business.
2. **Coaching leads to more engaged and committed employees.** Managerial coaching shows strong evidence of boosting engagement.
3. **Higher productivity outcomes.** Coaching refocuses people on the most important objectives and lets them know that their manager is paying attention to them. Peter Drucker hypothesized that if an organization could increase productivity by only ten percent, profits would double. The bottom-line impact of coaching is hard to ignore.
4. **Coaching leads to a stronger culture.** An organization's culture has a big impact on performance and productivity. Leaders influence culture by the example they set and the behavior they reward or curb in their daily conversations with people.
5. **Coaching strengthens relationships between supervisor and employee.** When managers coach, they are expressing their personal commitment to the development of an employee.
6. **Coaching promotes healthier individuals.** When leaders take the time to coach someone, they contribute to that person's self-esteem and confidence.
7. **Resilience.** Coaching encourages resilience when problems arise and mistakes are made. Managers can help people learn to think for themselves, create their own energy, and meet challenges without the need for micromanaging.
8. **Heightened creativity and innovative thinking.** Coaching is a mutual exploration of better ways to approach challenging situations, thus encouraging people to have their own ideas.
9. **Increased risk taking and exploring.** Coaching encourages people to pursue projects and provides a safety net and support.
10. **Mindset of an owner instead of a hired hand.**

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Coaching helps people take responsibility and ownership of problems and solutions. (Zenger & Stinnett, *The Extraordinary Coach*, 2010)

The Coaching Conversation Checklist

There is a strong case for using a checklist to ensure success in many professions. Airline pilots have used them for years. Surgeons are now using them to lower rates of infection and death, thus saving millions in hospital expenses.

Having a guide to follow reduces stress and uncertainty. It also increases a manager's confidence that nothing important will be forgotten. Smart managers use a coaching conversation checklist to create breakthrough results.



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