

# COACHING & COUNSELING

*Maximizing Opportunities*



**EDGE**Training  
*systems inc.*



**Instructor's Guide**

FOR PREVIEW PURPOSES ONLY

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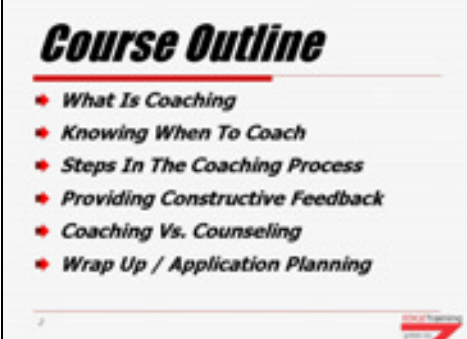
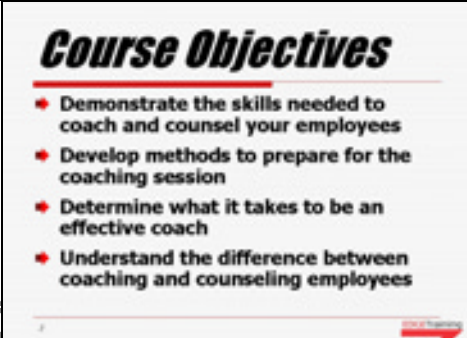
## ***Coaching & Counseling Facilitator Guide Course Description***

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<b>Purpose:</b>	This course is designed to help participants develop their coaching skills as well as their ability to identify their own coaching needs.
<b>Audience:</b>	This class is designed for employees at all levels of development.
<b>Class Size:</b>	Approximately 24 to 28 participants.
<b>Prerequisite Material:</b>	None.
<b>Materials/ Equipment:</b>	<p>The following materials are recommended for this course:</p> <ul style="list-style-type: none"><li>♦ Video: <i>Coaching and Counseling</i></li><li>♦ Flipchart stand and paper or dry erase board</li><li>♦ Notepaper</li><li>♦ Tent cards or name tags</li><li>♦ PowerPoint &amp; Projector</li></ul>
<b>Organization:</b>	This course is divided into five units. The instructor's guide is designed to be used with the supporting Participant Course Book and the video titled <i>Coaching and Counseling</i> .
<b>Duration:</b>	<p>2 to 4 hours.</p> <p>The exercises in this Course Book are designed to allow the instructor to tailor the curriculum to fit specific class needs. Some exercises teach the same skills in slightly different ways. Depending on time allotment and participant needs, instructors may wish to omit certain exercises. Additionally certain exercises can be expanded to include individual, partner, small group or whole class options.</p>

# COACHING & COUNSELING

## Maximizing Opportunities

<b>Slide 1</b>		<p>Welcome the group to the Coaching &amp; Counseling workshop.</p> <p><b>Say:</b> we are going to try a type of coaching through positive reinforcement.</p> <p>Have participants sign in using the workshop sign in form. Introduce the workshop materials.</p> <p><b>2 Minutes</b> <b>Opening Slide</b></p>
<b>Slide 2</b>		<p>Review this slide as a guide or agenda to how the course will develop.</p> <p><b>2 Minutes</b> <b>Page # 1</b></p>
<b>Slide 3</b>		<p>Review these objectives focusing on utilizing practical application throughout the course to better hone in on developing our coaching skills.</p> <p><b>Page # 2</b></p>

# COACHING & COUNSELING




## Maximizing Opportunities

<b>Slide 4</b>	<p><b><u>Why Do I Need To Coach?</u></b></p> <p><b>People Usually Do Not Get Better On Their Own</b></p> <p><i>They Must Have Someone Or Something To Help Them Measure Improvement.</i></p>	<p><b>Say:</b> Why Do I Need To Coach?</p> <p>Allow group discussion on the question "Why?"</p> <p>Then show comment focusing on measurable improvement. Explain Coaching &amp; counseling needs to be a win-win scenario.</p> <p><b>5 Minutes</b> <b>Page # 2 &amp; # 3</b></p>
<b>Slide 5</b>	<p><b><u>What Is Coaching?</u></b></p> <p><b>In Your Table Groups, Brainstorm What Coaching Means To You.</b></p> <p><b>Be Prepared To Report Out To The Class.</b></p>	<p>Allow about 5-10 minutes for this activity, the purpose is to get participants to understand what coaching is all about.</p> <p>There is no right answer; you are just trying to persuade them to the positive relationship theme.</p> <p>Participants brainstorm, then pick a team spokesman, write their ideas on the white board and let them explain them.</p> <p><b>10 Minutes</b> <b>Page # 4</b></p>
<b>Slide 6</b>	<p><b><u>What Is Coaching?</u></b></p> <ul style="list-style-type: none"> <li>➤ Coaching transfers the knowledge and skills to improve employee performance</li> <li>➤ Coaching is all about encouraging, correcting &amp; challenging your team</li> <li>➤ Coaching is noticing how your team is performing and telling them</li> </ul>	<p>Review what coaching is by reading the slide.</p> <p><b>Say:</b> We are taking a forward thinking approach to coaching through positive reinforcement.</p> <p>Focusing on coaching for positive results, catching people doing things right.</p> <p><b>2 Minutes</b> <b>Page # 4</b></p>



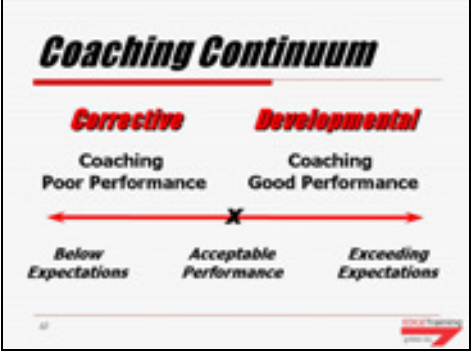


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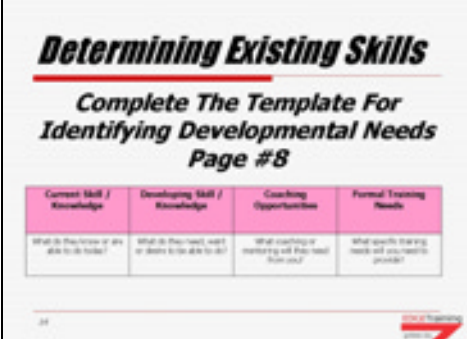

## Maximizing Opportunities

<p><b>Slide 7</b></p>		<p>Ask the group to think about this question.</p> <p>Allow 1 – 2 minutes to reflect on their best coach.</p> <p>Debrief or discuss by asking for volunteers to debrief their best coach.</p> <p><b>8 Minutes</b> <b>Page # 4</b></p>
<p><b>Slide 8</b></p>		<p>Powerful Question</p>
<p><b>Slide 9</b></p>		<p><b>Say:</b> Coaching and counseling offer win-win partnerships in the workplace.</p> <p>For the employee being coached, the opportunity provides direction for growth as well as constructive feedback.</p> <p>For the coach, the relationship brings the reward of drawing on one's own experience to help another.</p> <p>This is all accomplished through mutual respect and trust</p> <p><b>5 Minutes</b></p>


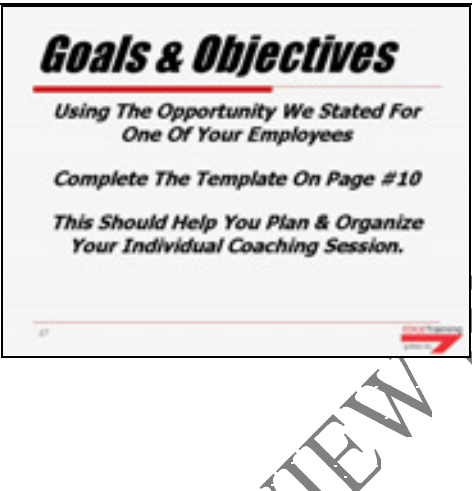

# COACHING & COUNSELING



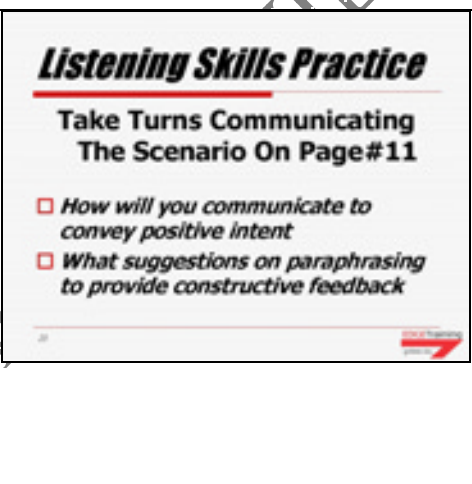
## Maximizing Opportunities




<p><b>Slide 10</b></p>	 <p><b>Coaching Continuum</b></p> <p><b>Corrective</b>      <b>Developmental</b></p> <p>Coaching Poor Performance      Coaching Good Performance</p> <p>Below Expectations      Acceptable Performance      Exceeding Expectations</p>	<p>Managers tend to look at “Acceptable Performance” as a destination. In today’s corporate environment, we as Leaders must look at Acceptable Performance as a journey to achieve “Outstanding Performance.”</p> <p>We sometimes struggle with the question of where do we draw the line between coaching and counseling?</p> <p>Coaching is Developmental: We must coach employees at all levels of their development in order to reap the benefits of their “Maximum Potential”</p> <p>Counseling is Corrective: Often we have to counsel employees to gently get them back on track.</p> <p><b>5 Minutes</b> <b>Page # 5</b></p>
<p><b>Slide 11</b></p>	 <p><b>Coaching &amp; Counseling</b></p> <p><i>As You Watch The Video, Take Note Of The Different Ways And Different Times When You Need To Coach</i></p> <p><i>Take Note Of The Seven Steps Included In The Coaching Process</i></p>	<p><b>Materials Needed:</b> TV/VCR/DVD Video “Coaching and Counseling” 24 Minutes</p> <p>Ask participants to take notes.</p> <p>They are looking for the times when to coach and the seven steps included in the Coaching Challenge</p> <p><b>24 Minutes</b> <b>Page # 6</b></p>
<p><b>Slide 12</b></p>	 <p><b>Steps In Coaching</b></p> <ol style="list-style-type: none"> <li>1. Determine Existing Skills</li> <li>2. Establish Goals &amp; Objectives</li> <li>3. Inspire Confidence</li> <li>4. Explain The Process &amp; Demonstrate</li> <li>5. Observe The Employee At Work</li> <li>6. Evaluate Learning &amp; Provide Feedback</li> <li>7. Follow Up &amp; Make Adjustments</li> </ol>	<p>Briefly explain the seven steps in coaching</p> <p>We will get into more detail in the next few slides</p> <p>Have participants take notes in the participant book</p> <p><b>5 Minutes</b> <b>Page # 7</b></p>

<p><b>Slide 13</b></p>		<p>Explain the 1st step in the coaching process. You will want to explain in detail as participants take notes in their Participant Guide.</p> <p><b>5 Minutes</b> <b>Page # 7</b></p>
<p><b>Slide 14</b></p>		<p>Have participants complete the activity using the area of development example.</p> <p><b>8 Minutes</b> <b>Page # 8</b></p>
<p><b>Slide 15</b></p>		<p>Explain step # 2 in the coaching process.</p>






<p><b>Slide 16</b></p>	 <p><b>SMART Goals</b> Page #9</p> <p><b>Specific:</b> Be sure to focus on specific issues, behaviors or actions. Seek Clarity!</p> <p><b>Measurable:</b> Put a measurement system in place. If you can't measure something, you can't manage it.</p> <p><b>Achievable:</b> Be sure to set a goal that you know is attainable and achievable.</p> <p><b>Relevant:</b> The goal must be relevant to their job or to the organization's success.</p> <p><b>Timebound:</b> There must be a timeline associated with goals in order to follow up and coach.</p>	<p>Setting goals is an important part of improving the performance of your employees. Otherwise, you set people up for failure and they might never reach their performance goals.</p> <p><b>Facilitator:</b> As you read off each acronym letter, provide a brief description of what it means and have participants complete page # 9. SMART goals ensure that the goal you write is able to be accomplished by your employee.</p> <p><b>5 Minutes</b> <b>Page # 9</b></p>
<p><b>Slide 17</b></p>	 <p><b>Goals &amp; Objectives</b></p> <p>Using The Opportunity We Stated For One Of Your Employees</p> <p>Complete The Template On Page #10</p> <p>This Should Help You Plan &amp; Organize Your Individual Coaching Session.</p>	<p><u>Activity</u></p> <p>Have participants complete the bottom of page # 10 to serve as a practice session in order to state a goal or objective they would like to complete.</p> <p>Remind them to keep it short, specific, behavioral, etc. Allow time for them to finish, and then ask for volunteers to read their goals.</p> <p>Have them share &amp; practice with their partners to convey their SMART Goals.</p> <p><b>10 Minutes</b> <b>Page # 10</b></p>
<p><b>Slide 18</b></p>	 <p><b>Time For A Break</b></p>	


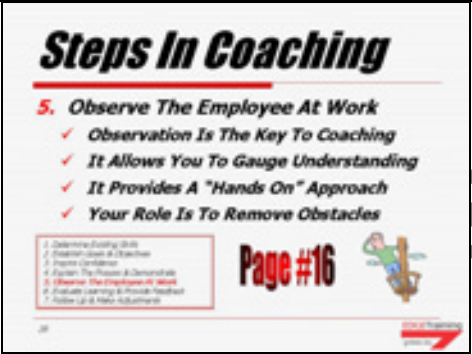
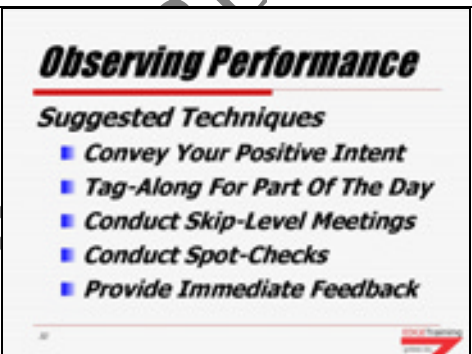
<p><b>Slide 19</b></p>		<p>Explain in detail step # 3. Direct participants to page # 11, read the scenario, discuss in their table groups and proceed to page # 12 to jot down their ideas and answer the questions.</p> <p><b>5 Minutes</b> <b>Page # 11</b></p>
<p><b>Slide 20</b></p>		<p>Brief tips on how to actively listen</p> <p><b>2 Minutes</b> <b>Page # 11</b></p>
<p><b>Slide 21</b></p>		<p>Have participants pair up with a partner and debrief the previous activity, the objectives are to convey your positive intent and discuss ways to paraphrase the scenario to provide constructive feedback.</p> <p><b>8 Minutes</b> <b>Page # 12</b></p>

<p><b>Slide 22</b></p>		<p>Explain step # 4 in the coaching process.</p> <p><b>Activity:</b> Have participants think of an opportunity to coach one of their team members. Have them pair up with a partner and follow step # 4, "Explain The Process &amp; Demonstrate"</p> <p><b>6 Minutes</b> <b>Page # 13</b></p>
<p><b>Slide 23</b></p>		<p>Speaking notes: (Prepare), Tell, Show, Do, Review ensures that each trainee receives the new material in many different ways. They hear about it, they see it, and they have a change to do it (practice and participate). "Doing" has the most impact on retention, and periodic reviews ensure that the trainee does not move on until they're ready. We'll be talking about this entire process, but <u>before we discuss it in full, let's discuss one of the most important steps: Prepare.</u></p> <p><b>Page # 14</b></p>
<p><b>Slide 24</b></p>		<p>Speaking notes: <u><b>Tell</b> the learner about each step or part of the task. AS you are doing this, define the task and explain each step.</u></p> <p>Let's say you are teaching someone to tie their shoe. You'll define the task by saying "Shoestrings are tied together in a knot for the purpose of keeping your shoes snug and on your feet."</p> <p>Explain each step using a list or sequential format. Ex: "First take hold of a side of the lace with each hand. Next, make an X with the laces and fold the one on top over and back under the other one. etc., etc."</p>

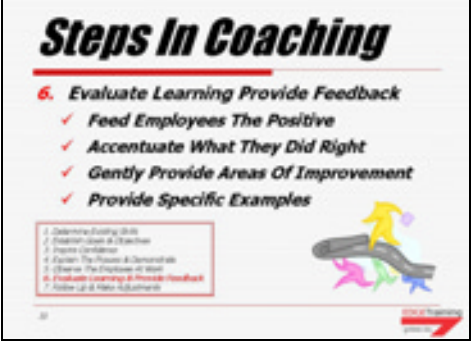

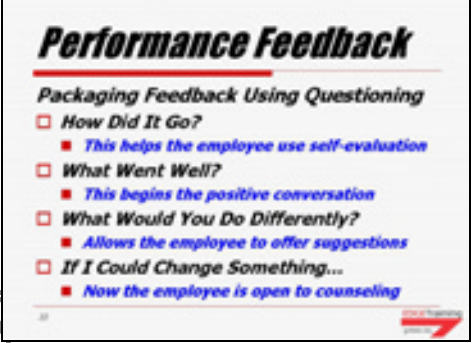
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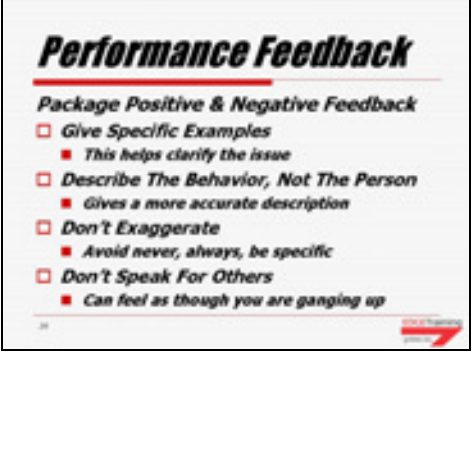
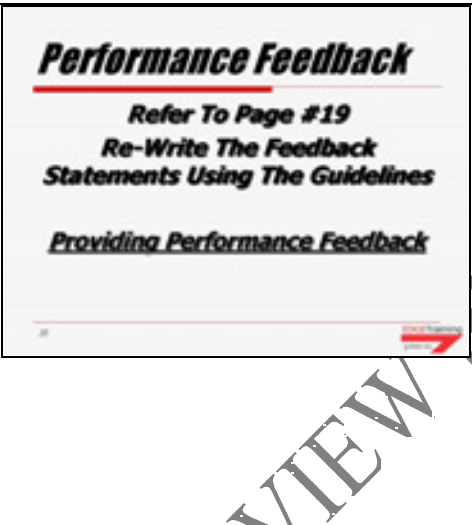

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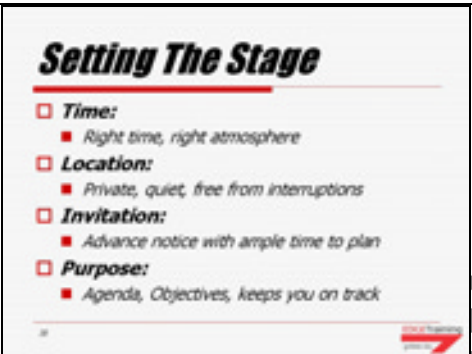
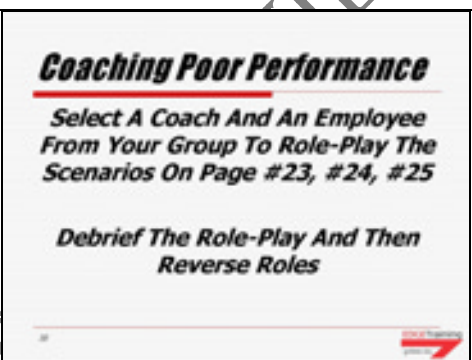
<p><b>Slide 25</b></p>	 <p><b>Training Method</b></p> <p><b>Show</b></p> <ul style="list-style-type: none"> <li>■ Demonstrate Each Step</li> <li>■ Emphasize Key Points</li> <li>■ Discuss Difficult Steps</li> <li>■ Involve The Person</li> </ul>	<p>Speaking notes:</p> <p>Next, <b>Show</b> the learner how to do each step or part of the task.</p> <p>Restate the steps given in the “Tell” portion of our example, but actually show the steps as you say them this time.</p> <p>In <u>demonstrating the task, explain each step emphasizing the key point and more difficult steps.</u> Remember the little and seemingly simple parts of the task. <u>Get the trainee involved by asking questions about what is being shown.</u></p>
<p><b>Slide 26</b></p>	 <p><b>Training Method</b></p> <p><b>Do</b></p> <ul style="list-style-type: none"> <li>■ Have The Person Do Each Step</li> <li>■ The Person Explains Each Step</li> <li>■ Coach And Redirect As Needed</li> </ul>	<p>Speaking notes:</p> <p><u>Have the trainee Do each step of the task, both while being observed by the trainer and then without the trainer observing. Ask the trainee to explain each step as it is performed.</u> If steps or parts of the task are omitted, re-explain the steps and have the trainee repeat them.</p> <p>In our shoe-tying example, the trainee should tie shoes the first time while saying each step as they go. The second time, shoes should be tied without having to say the steps out loud. Subsequent ties can be done without supervision if the task has been properly demonstrated. <u>Coaching and redirecting should be done as needed</u> to ensure the task continues to be done correctly.</p>
<p><b>Slide 27</b></p>	 <p><b>Training Method</b></p> <p><b>Review</b></p> <ul style="list-style-type: none"> <li>■ Review The Steps</li> <li>■ Use Self Appraisal</li> <li>■ Emphasize Key Points</li> <li>■ Coach And Redirect As Needed</li> </ul>	<p>Speaking notes:</p> <p><u>Review each step or part of the task with your trainee.</u></p> <p>Offer encouragement, constructive criticism and additional pointers on how to do the job. Be frank in the appraisal. Also, <u>encourage your trainee to evaluate his/her performance of the trained tasks.</u> <u>Emphasize the key points</u> brought out by the training and more difficult steps to ensure they are learned. Once again, <u>coach and redirect as needed.</u></p>




<p><b>Slide 28</b></p>	 <p><b>Instructional Activity</b></p> <p>Tell Show Do Review</p>	<p>Prepare, Tell, Show, Do, Review activity: Paper air plane.</p> <p>Divide the group into pairs. Person A should make a paper airplane as an example. Person B should just hang out during this process (which should take 1-2 minutes). Person A should then use the Tell, Show, Do, Review process to train Person B to make a paper airplane. As the facilitator, you should move about the room to ensure that the process is being followed. Redirect the trainers if they skip any steps.</p> <p>Switch roles and let Person B be the trainer. Feel free to have a flying contest when all planes are made (if you feel the group can be brought back to reality rather quickly.)</p> <p>Debrief the activity using page # 15</p>
<p><b>Slide 29</b></p>	 <p><b>Steps In Coaching</b></p> <p><b>5. Observe The Employee At Work</b></p> <ul style="list-style-type: none"> <li>✓ Observation Is The Key To Coaching</li> <li>✓ It Allows You To Gauge Understanding</li> <li>✓ It Provides A "Hands On" Approach</li> <li>✓ Your Role Is To Remove Obstacles</li> </ul> <p>Page #16</p>	<p>Explain the importance of step # 5 and open a discussion with participants on how to observe employee.</p> <p><b>5 Minutes</b> <b>Page # 16</b></p>
<p><b>Slide 30</b></p>	 <p><b>Observing Performance</b></p> <p><b>Suggested Techniques</b></p> <ul style="list-style-type: none"> <li>■ Convey Your Positive Intent</li> <li>■ Tag-Along For Part Of The Day</li> <li>■ Conduct Skip-Level Meetings</li> <li>■ Conduct Spot-Checks</li> <li>■ Provide Immediate Feedback</li> </ul>	<p>After the class has discussed suggestions on observing their team members at work, show this slide and compare to any other suggestions they may have come up with during their brainstorming session.</p> <p><b>2 Minutes</b> <b>Page # 16</b></p>



<p><b>Slide 31</b></p>		<p>Evaluating learning is helpful in order to provide constructive feedback. When evaluating performance remember to think in terms of measurable behaviors.</p> <p>Without clear measurement, it is difficult to provide feedback.</p> <p><b>5 minutes</b></p>
<p><b>Slide 32</b></p>		<p>Ask this question, “what is the most common type of feedback?”</p> <p>Most of the time it is “no feedback”, as managers we tend not to say anything, or focus on the negative.</p> <p>Explain the importance of providing positive feedback as reinforcement to positive behavior.</p>
<p><b>Slide 33</b></p>		<p><b>5 Minutes</b> <b>Page # 17</b></p>

<p><b>Slide 34</b></p>		<p><b>5 Minutes</b> <b>Page # 18</b></p>
<p><b>Slide 35</b></p>		<p>This exercise is designed to allow participants to take a negative feedback statement and turn it into a positive learning experience.</p> <p>Allow 10 -15 minutes to complete the activity then debrief this by allowing students to share their ideas and new statements.</p> <p>There will be a variety of responses.</p> <p>Have participants re-write the statement on page # 19 as to not create a defensive reaction with employees.</p> <p><b>10 Minutes</b> <b>Page # 19</b></p>
<p><b>Slide 36</b></p>		<p>Explain step # 7</p> <p>Follow up and adjustments are the key to assessing if the employee has gained knowledge during the coaching session.</p> <p>This step also acts as reinforcement as well as a measurable achievement in order to gauge the employee's learning and follow through.</p> <p><b>5 Minutes</b> <b>Page # 20</b></p>

<p><b>Slide 37</b></p>	 <p><b>Coaching Vs. Counseling</b></p> <ul style="list-style-type: none"> <li>❑ <b>Coaching Is About Performance</b> <ul style="list-style-type: none"> <li>■ Setting Clear Expectations</li> <li>■ Directing The Development Of Employees</li> <li>■ Mentoring And Reinforcing Performance</li> </ul> </li> <li>❑ <b>Counseling Is About Expectations</b> <ul style="list-style-type: none"> <li>■ Determining Obstacles Impeding Performance</li> <li>■ Minimize The Barriers To Acceptable Standards</li> <li>■ Providing Clear Expectations Or Training</li> </ul> </li> </ul>	<p><b>Page # 21</b></p>
<p><b>Slide 38</b></p>	 <p><b>Setting The Stage</b></p> <ul style="list-style-type: none"> <li>❑ <b>Time:</b> <ul style="list-style-type: none"> <li>■ Right time, right atmosphere</li> </ul> </li> <li>❑ <b>Location:</b> <ul style="list-style-type: none"> <li>■ Private, quiet, free from interruptions</li> </ul> </li> <li>❑ <b>Invitation:</b> <ul style="list-style-type: none"> <li>■ Advance notice with ample time to plan</li> </ul> </li> <li>❑ <b>Purpose:</b> <ul style="list-style-type: none"> <li>■ Agenda, Objectives, keeps you on track</li> </ul> </li> </ul>	<p><b>5 Minutes</b> <b>Page # 22</b></p>
<p><b>Slide 39</b></p>	 <p><b>Coaching Poor Performance</b></p> <p><i>Select A Coach And An Employee From Your Group To Role-Play The Scenarios On Page #23, #24, #25</i></p> <p><i>Debrief The Role-Play And Then Reverse Roles</i></p>	<p><b>Activity</b></p> <p><b>10 Minutes</b> <b>Pages # 23, # 24, # 25</b></p>

<p><b>Slide 40</b></p>		<p>Briefly review the seven steps in coaching.</p>
<p><b>Slide 41</b></p>		<p>Utilize Page # 26 for participants to complete, have them seal it in an envelope and address it to themselves.</p> <p>Turn it in to the instructor and the instructor will mail it sometime in the future.</p> <p>This will serve as a reminder to them and also a commitment since they have written it down.</p>
<p><b>Slide 42</b></p>		

Slide 43



Complete Evaluations

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