

We Need to Talk:
Coaching Employees

Training Leader's Guide

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Introduction

Performance coaching is a critical aspect of every managers' or supervisors' job. In the training session, participants will learn the key elements necessary for a productive performance coaching session. Performance coaching is the term used for meetings in which a manager wishes to help an employee improve a specific work behavior or skill. Naturally, these meetings can be difficult, but avoiding them is counterproductive for several reasons:

1. The organization suffers lost production when the poor performance continues.
2. The manager suffers from the mounting stress of avoiding an inevitable and often worsening situation.
3. The employee suffers from the lack of an opportunity to be coached to his or her best work performance.

So, although performance coaching can be difficult, it is also a critical component of every manager's job. When it is done well, it can also be amongst the most rewarding aspects of his or her work.

This course has been designed to help make performance coaching easier. During the session, participants will learn how to:

prepare for the meeting
focus on the employee's performance issues
explore the causes of the employee's poor performance.
Seek agreement with the employee on how to solve the problem(s)
Explore options for improvement
Agree on a plan for improvement
Review and evaluate the performance meeting

Icon Key

<Flip Chart>

<Read or Paraphrase>

<Overhead>

<Worksheet>

<Video>

<Ask and Discuss>

Training Session Checklist

This checklist should be used to help you gather all necessary materials for the training sessions.

Meeting Preparation

Determine your training objectives.

Measure the current status of your participants, using the Pretraining Survey.

Choose Different ways to train to ensure transfer of information.

Location

Create a relaxed environment

Make sure all seats have a good view of the visuals.

Make sure there is enough light to take notes when participants view the video *We Need*

To Talk: Coaching Employees

Provide an adequate writing surface for participants.

Assure good acoustics.

Assure that your room is accessible and equipped for participants with disabilities.

Video Equipment

Make sure the VCR is properly connected to the monitor.

Test the VCR, and check monitor for proper picture, color, and volume.

Make sure the tape is rewound and ready to play before beginning your session.

Check all other equipment for proper operation.

Materials

Training Leader's Guide.

Videotape, *We Need To Talk: Coaching Employees*

AMI How-To Book, *Improving the Workplace Performance Through Coaching*

Overheads

Paper and Pencil

Additional Equipment

Participant Handouts

Trainer's Instructions for Using the Book *Improving Workplace Performance Through Coaching*

<Book Icon with Title, Karen Lawson, PH.D.>

Group Training Session

Improving Workplace Performance Through Coaching, part of AMI's How-To Book Series, is an excellent complement to your group training session. Throughout this guide, we have included several exercises from *Improving Workplace Performance Through Coaching*. To use the book effectively, you may:

Use the exercises we have developed for this course, incorporate other exercises from the book that you feel better meet the needs of your organization, or use a combination of both.

Assign reading of an entire chapter of the book that covers an area you wish to emphasize in your session.

Assign reading of the entire book and completing of assigned exercises.

Self-Study

No time to call everyone together for training? No problem-American Media has made training even easier with its self-study programs. By combining the effectiveness of the video, *We Need to Talk: Coaching Employees*, and AMI's How-To Training Book, *Improving Workplace Performance Through Coaching*, your employees can improve their skills through self-guided study.

Written in a user-friendly, easy-to-understand style, the book includes interactive exercises in each chapter to help the reader process the information and put it into action-ensuring that the information makes an impact.

On-the-Job Reference Tool

Providing copies of the book to each training participant allows you to continue instilling the importance of improving workplace performance after your session is completed. The book is an excellent tool for continued learning and provides an easy, hands-on reference for use on the job.

Order discounted copies for all your session participants today by calling American Media at 1-800-262-2557.

Tips for Transferred Learning (same as original)

Possible Session Agendas

Two session agendas have been provided to help guide you through your We Need to Talk: Coaching Problem Employees training session. You can modify these agendas to meet the needs of your participants. A blank agenda sheet is also provided on page 7 if you wish to create your own agenda.

1 ½ - Hour Session

Activity

Introducing the Session to Participants	10 minutes
Show Video and Review	40 minutes
Creating a Positive Environment Role Play Exercise	20 minutes
Exercise from the Book	
Improving Workplace Performance Through Coaching	20 minutes

3 – Hour Session

Introducing the Session to Participants	10 minutes
Show Video and Review	40 minutes
Creating a Positive Environment Role Play Exercise	20 minutes
10-Minute Break	
Exercise from the Book	
Improving Workplace Performance Through Coaching	20 minutes
Seek Agreement Discussion	15 minutes
Explore Options Exercise	15 minutes
Agree on a Plan Exercise	15 minutes
10-Minute Break	
Creating An Action Plan Exercise	15 minutes
Posttraining Survey	20 minutes
Session Evaluation	5 minutes

Trainers Personalized Session Agenda (same as the original)

Invitation Memo to Participants

This memo can be sent to your participants approximately one to two weeks prior to your training session. Modify the letter to fit your specific needs.

(Today's Date)

To: (Participant's Name)

From: (Trainer's Name)

Re: ***We Need to Talk: Coaching Employees***

Performance coaching is a critical aspect of every manager's or supervisor's job. Performance coaching is the term used for meetings in which a manager wishes to help an employee improve a specific work behavior or skill. Although performance coaching can be difficult it is a critical component of every manager's job. When it is done well, it can also be among the most rewarding aspects of his or her work.

On (insert date), we will be holding a training session on how to effectively conduct performance coaching. The session will be held at (insert location). During the session you will learn how to:

Prepare for the meeting

Focus on the employee's performance issues

Explore the causes of the employee's poor performance

Seek agreement with the employee on how to solve the problem(s)

Explore options for improvement

Agree on a plan for improvement

Review and evaluate the performance meeting

To help us get the most out of our training session, please take the time to complete the enclosed Pretraining Survey, and return it to me by (insert date). Your honest response to these questions will help us place emphasis on critical areas.

Please mark your calendar so you can attend this very important training session.

Thanks!

Trainer's Instructions for the Pretraining Survey

<worksheet icon>

1. Complete the Invitation Memo to Participants (page **), and enclose a copy of the Pretraining Survey (included with Participant Materials) to each of the participants. Ask them to complete the survey and return it to you at least five days before the training session.
2. Use the Pretraining Survey to evaluate the needs of your participants. This survey will allow you to design the training session to emphasize areas or topics of importance.
3. A Postraining Survey is also provided for use at the end of the training session, to determine if your training goals have been met, or if further education and training are necessary.

Introducing the Session to Participants

Time Required:

10 minutes

Materials Needed:

Overhead 1

Objective:

To introduce participants to each other and create an environment conducive to training

1. Ask participants to introduce themselves and briefly explain their jobs.

<overhead 1>

2. After all participants have finished their introductions, introduce yourself to the group. Then describe the agenda for this training session and outline the training goals.

<read or paraphrase icon>

3. Read or paraphrase the following to the group:
During this session, you will learn how to:
Prepare for the performance coaching meeting
Focus on the employee's performance issues
Explore the causes of the employee's poor performance
Seek agreement with the employee on how to solve the problem(s)
Explore options for improvement
Agree on a plan for improvement
Review and evaluate the performance meeting.

Show Video and Review

Time Required

40 minutes

Materials Needed:

Video, We Need to Talk: Coaching Employees

We Need To Talk Video Worksheet

We Need To Talk Video Worksheet – Trainer’s Guide

Objective:

To show video and discuss as a group

<video icon>

1. View the video, We Need To Talk: Coaching Employees

<worksheet Icon>

2. Provide each participant with the We Need To Talk Video Worksheet (found in the Participant Materials). A Trainer’s Guide for this worksheet is located with the Participant Materials.

<group discussion icon>

3. After viewing the video, discuss the videos’ main points as a group.

Creating a Positive Environment Role Play Exercise

Time Required:

20 minutes

Materials Needed:

Creating a Positive Environment Role Play Scenarios

Objective:

To practice creating a comfortable environment for the employee.

<read or paraphrase icon>

1. Read or Paraphrase:

An effective coach must create a positive environment for the employee. Body language and eye contact are important. Lean forward and don't fold your arms – these body signals let the employee know he or she has your undivided attention. A private setting is also important as it prevents interruptions. Remember, the employee's perception of your desire to help may determine whether or not your coaching is successful.

<worksheet icon>

<read or paraphrase icon>

2. Ask participants to break into groups of two people. Give each group a copy of the role plays provided in the participant materials. Read or paraphrase the following:

We are now going to role-play a performance coaching situation. I will give each group a copy of the role-plays. Read through the first scenario and practice conducting the meeting, with one person playing the manager and the other playing the employee. When you are done, switch roles and role-play the second scenario.

<group discussion icon>

3. Give teams about 5-7 minutes to practice each of the role-plays. Discuss the following ideas:

- Was it more difficult controlling the content of the meeting or the atmosphere of the meeting, i.e., sending the right body language signals?
- Did the employee become defensive when you discussed his or her performance? If so, was it easy or difficult to maintain your composure and remain positive and supportive?
- Did you remember to ask for employee feedback? If so, did you learn anything from the feedback?

Exercise from the Book Improving Workplace Performance Through Coaching

Time Required:

20 minutes

Materials Needed:

The AMI How-To Book, Improving Workplace Performance Through Coaching.

Objective:

To learn the importance of listening skills.

<read or paraphrase icon>

1. Read or paraphrase:

Really listening to an employee will help you to really clarify and confirm the situation. It will alert to you their underlying feelings. Listening should promote two-way communication, not one-way communication. Show them that you are listening through body language as well.

<book icon with title and author>

2. Ask participants to read pages 53 to 56 of the book, Improving Workplace Performance Through Coaching and to complete the Take a Moment exercise on page 56. It may be necessary to turn to page 14 of the book to identify an employee in order to visualize a coaching session.

<group discussion icon>

3. As a group discuss some of the answers that the participants came up with.

Seek Agreement Discussion

Time Required:

15 minutes

Materials:

Flip Chart or Chalkboard

Seek Agreement Discussion – Trainer’s Guide

Objectives:

To discuss methods for obtaining an employee’s cooperation for changing behavior.

<read or paraphrase Icon>

1. Read or paraphrase:

In order for coaching to be effective, the employee has to understand that the problem exists and that there are consequences if the problem is not corrected. Some employees are aware of the problem before it is pointed out to them, but they do not know how to fix it on their own. Others may not be aware of the problem, but they respond enthusiastically to coaching. Still others respond defensively when coached. Let’s discuss the three main forms of defensive behavior you may experience as a coach.

- The employee will question your authority to coach.
- The employee will pretend to agree with you but actually have no intention of changing the behavior.
- The employee may agree with you, even offering suggestions for other areas of self-improvement as a way of minimizing your comments.

<group discussion icon>

<flip chart icon>

2. Discuss ideas as a group and summarize the ideas on a flip chart or chalkboard. You may wish to appoint one person to record all ideas to make copies to distribute after the training session or to send it with your follow-up materials. A Seek Agreement Discussion – Trainer’s Guide can be found with the Participant Materials.

Explore Options Exercise

Time Required:

15 minutes

Materials Needed:

Explore Options Worksheet

Explore Options Worksheet – Trainer’s Guide

Objective:

To practice working with the employee to explore his or her options.

<read or paraphrase icon>

1. Read or paraphrase:

Great coaches share some of the same qualities as great teachers. Great teachers know that the best way to help people learn is to allow them to experience the consequences of their thoughts and actions. Therefore, it is important to actively involve employees during the problem-solving sequence of the coaching process.

Employees have to have the opportunity to voice their feelings and concerns. As the coach, you must listen even though you may not always agree. In many respects, this can be the most important stage in the coaching process. Once the employee has agreed a problem exists, it is now the coach’s responsibility to help the employee explore options for correcting the problem.

One way to help employees explore solutions for their problems is by posing a series of open-ended questions. Open-ended questions are those that require more than a simple yes or no answer. They require the employee to think about the question and formulate an answer. Within these answers lies the framework for changing the employee’s behavior.

<worksheet icon>

2. Distribute copies of the Explore Options Worksheet (found with the Participant Materials) to each participant. Give participants 5-10 minutes to complete the worksheet. An Explore Options Worksheet – Trainer’s Guide is available with the Participant Materials)

<read or paraphrase icon>

3. When all participants are done, read or paraphrase the following:

Phrasing your questions to the employees in an open-ended style is a good way to avoid simple yes or not answers and to get the employee to positively interact in the problem-solving phase. They will be forced to think about the situation and produce a workable answer to the problem.

Agree on a Plan Exercise

Time Required:

15 minutes

Materials Needed:

Agree on a Plan Worksheet

Objective:

To practice creating a workable plan for improving employee's performance.

<Read or paraphrase icon>

1. Read or paraphrase:

If the coach has helped the employee consider several options through the use of open-ended questions, agreeing on a plan is simply a matter of plotting the course for improved performance. And if the suggestions for improvement have come from the employee, he or she is simply putting into practice his or her own ideas for success.

<worksheet icon>

2. Distribute copies of the Agree on a plan worksheet to each participant. Give participants 5-10 minutes.

<group discussion icon>

3. When all participants are done, read through the worksheet as a group and discuss answers.

Creating an Action Plan Exercise

Time Required:

15 minutes

Materials Needed:

The AMI How-To Book, Improving Workplace Performance Through Coaching

Objective:

To create an action plan to become an effective performance coach.

<Read or paraphrase icon>

1. Read or paraphrase:

To close our training session, we're going to create an action plan to help you become an effective performance coach. There are many steps to take and consider when coaching an employee's performance. It will take a little practice, but thinking about areas to work on will help you improve faster.

<book icon with title and author>

2. Ask the participants to turn to page 86 of the book, Improving Workplace Performance Through Coaching. Give them ten minutes to read page 86 and to fill out the Your Action Plan for Coaching exercise on page 87.

<read or paraphrase icon>

3. When all participants are done, read or paraphrase the following to the group:

Now that you have taken the time to create this action plan, use it! It is important to become a good coach because coaching gets results. Not only does the organization benefit, but the employee benefits from increased self-esteem and job satisfaction. Remember to always follow-up your coaching sessions at a later date to check progress.

Posttraining Survey

Time Required:

20 minutes

Materials Needed:

Posttraining Survey

Objective:

To evaluate the effectiveness of the training session.

<read or paraphrase>

1. Read or paraphrase:

This worksheet is designed to evaluate the effectiveness of this training session. It will help us determine what areas we need to improve for future sessions. Your honest response to these questions is appreciated. In no way will it be used to penalize you.

<worksheet icon>

2. Distribute the Posttraining Survey (included with Participant Materials) and give each participant time to complete it. Collect completed surveys from each participant. If time allows, discuss answers as a group. Answers will vary for each participant.

Posttraining Survey

1. List three of the seven steps needed to prepare for a coaching performance meeting.
2. Why is it important to focus on the facts?
3. What method can you use to get the employee to explore the causes of his or her performance?
4. Why is it important to get the employee involved in creating a plan for improved behavior?

Follow-up Memo

The memo below should be personalized and sent to each participant one to two weeks after your training session. By following up in this manner, your participants will have the opportunity to review and utilize what they learned in their work environment.

(Today's Date)

To: (Participant's Name)
From: (Trainer's Name)
Re: We Need To Talk: Coaching Employees

Earlier this month, you attended a training session in which we talked about the importance of coaching employees to improve performance, and you learned the skills necessary to do so effectively. During the training session you learned how to:

- Prepare for the meeting
- Focus on the employee's performance issues
- Seek agreement with the employee on how to solve the problem(s)
- Explore options for improvement
- Agree on a plan for improvement
- Review and evaluate the performance meeting

If you would like to continue your own self-study to improve your performance management skills, you are welcome to contact me or (name/department) for the use of the We Need to Talk: Coaching Employees video, Improving Workplace Performance Through Coaching self-study book, an other materials we have collected on successful performance management.

Our hope is that you have been able to put the ideas you learned to work within your area. If you have any questions, please contact me at extension (###).

Thanks!

We Need To Talk: Coaching Employees

Participant Materials.

Pretraining Survey

INSTRUCTIONS: Reach each question and write or choose your answers in the space provided. Be prepared to discuss your answers at the training session. This survey is a learning exercise only and not a test.

1. Describe a time when you needed coaching. Think of instances at work, at school, or in your personal life. Who recognized your need for coaching?
2. List the qualities that you feel make a good coach. Circle the adjectives you feel you possess. Underline the areas in which you'd like to get some practice.
3. Can you think of any time coaching would not be a good idea? When?

We Need to Talk Video Worksheet

INSTRUCTIONS: Use this worksheet as a guide for taking notes while viewing the video.

Prepare for the Meeting:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Focus on the Issues

- 1.
- 2.
- 3.

Explore the Causes

- 1.
- 2.

Seek Agreement

- 1.
- 2.

Explore Options

- 1.

Agree on a Plan

- 1.

Review the Meeting

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

We Need To Talk Video Worksheet – Trainer’s Guide

Prepare for the Meeting:

1. Identify the performance or behavior you need to address.
2. Keep an open mind – don’t prejudge.
3. Define your objectives. Define a range of acceptable behavior for the position.
4. Set a positive tone. Make note of the specific things the employee does well – respect his or her self-esteem.
5. Allow the employee time to prepare for the meeting.
6. Create a positive, private atmosphere for both you and the employee.
7. Set time aside – let the employee know his or her performance is important to you.

Focus on the Issues

1. Focus on the facts.
2. Focus on the employee’s behavior, not his or her personality.
3. Don’t get distracted by arguments not related to the issue.

Explore the Causes

1. Assume the best.
2. Ask open-ended questions aimed at uncovering the reasons for poor performance.

Seek Agreement

1. Encourage self-analysis by the employee to identify the problem.
2. Ask the employee to restate the problem in his or her own words.

Explore Options

1. Involve the employee who assists in developing his or her own action plan will be more committed to following through with improved performance

Agree on a Plan

1. The employee who assists in developing his or her action plan will be more committed to following through with improved performance.

Review the Meeting

1. Review you own performance – how was your attitude?
2. Did you follow the structure?
3. Did you achieve your objectives?
4. Did you uncover the real causes behind the issue?
5. What could you improve on next time?

Document and record the action plan and give a copy to the employee.

Creating a Positive Environment Role-Play Scenarios

INSTRUCTIONS: Read through the performance coaching situations below. With your partner, practice conducting the meeting, with one person playing the manager and the other playing the employee. When you are done, switch roles and role-play the second scenario. Be prepared to discuss your experiences with the group.

Scenario 1

The employee has consistently filed documents incorrectly, leading to lengthy delays and poor customer service. Make the employee aware of the situation. Monitor your use of body language, and make your comments as positive and supportive as possible. At the conclusion of the session, the coach should ask the employee for feedback.

Scenario 2

The employee is consistently late producing data reports that he/she is required to distribute each Monday. This causes other employees, who depend on that data, to be late with their weekly analysis reports. Make the employee aware of the situation. Monitor your use of body language, and make your comments as positive and supportive as possible. At the conclusion of the session, the coach should ask the employee for feedback.

Seek Agreement Discussion – Trainer’s Guide

1. The employee will question your authority.
Be open to the employee’s ideas on how to improve his or her performance – the employee’s input is important to creating a workable action plan. When presenting your ideas, fully explain the reasons and logic behind them – you likely will present a point-of-view the employee hasn’t thought of. Be cooperative and patient with the employee, but remind him or her that you do have final authority.
2. The employee will pretend to agree with you but actually has no intention of changing the behavior.
Get the employee to agree on an action plan and get his or her commitment to stick to the plan. Follow-up meetings will ensure the employee is doing as he or she committed to.
3. The employee may agree with you, even offering suggestions for other areas of self-improvement as a way of minimizing your comments.
Have your plan and comments prepared before you meet with the employee. Allow the employee to offer his or her comments, but stick to your agenda until all performance issues have been covered to your satisfaction.

Explore Options Worksheet

INSTRUCTIONS: Read through each questions below and rewrite it so that it is an open-ended question. Be prepared to share your answers with the group.

Example:

Closed Question: Do you have all the data you need to produce these reports?

Open-Ended Question: What data do you need to produce these reports?

Closed: Are you receiving the data in time to produce the reports?

Closed: Do you need help prioritizing your workload?

Closed: Are you experiencing problems with other employees or departments?

Closed: Do you feel adequately trained in these procedures?

Closed: Are you aware of the deadlines established for this project?

Explore Options Worksheet – Trainer’s Guide

Closed: Are you receiving the data in time to produce the reports?

Opened: What changes can we think of to help you produce these reports on time?

Closed: Do you need help prioritizing your workload?

Opened: What actions can I take to help you better prioritize your workload?

Closed: Are you experiencing problems with other employees or departments?

Opened: What problems with other employees or departments are you having that I should be aware of?

Closed: Do you feel adequately trained in these procedures?

Opened: What further training do you feel might help you better understand these procedures?

Closed: Are you aware of the deadlines established for this project?

Opened: What problems have you experienced that have prevented you from meeting the deadlines established for this project?

Agreement on a Plan Worksheet

INSTRUCTIONS: Provided below is a possible questions and answer given during a performance coaching situation. Use this situation as a basis for answering the questions that follow. Your answers will help you formulate a plan for improving the employee's behavior.

Open-Ended Question: What actions can I take to help you better prioritize your workload?

Possible Employee Answer: I get requests for both the accounting report and the data entry report every Thursday. But I don't know which one should be done first, and I don't feel I even have authority to decide. I always try to get them both done, but one of them always get delivered late – making that department unhappy. Or other times they both get done, but they're incomplete – making both departments unhappy. Combined with our regular workload, it's too much work to get done in one day.

1. As a manager of this employee, what do you see as the cause(s) of this employee's poor performance?
2. What management action can you take to improve the problem?
3. What course of action would you suggest to the employee?

Posttraining Survey

INSTRUCTIONS: Read each question and write or choose your answers in the space provided. Be prepared to discuss your answers with the group. This survey is a learning exercise only and not a test.

5. List three of the seven steps needed to prepare for a coaching performance meeting.
6. Why is it important to focus on the facts?
7. What method can you use to get the employee to explore the causes of his or her performance?
8. Why is it important to get the employee involved in creating a plan for improved behavior?

Session Evaluation Form
We Need to Talk: Coach Problem Employees

INSTRUCTIONS:

Please circle the number that best describes your evaluation of the training session.

This training program concentrates on the importance of developing effective performance coaching skills.

This training program helped me understand the importance of performance coaching skills.

As a result of this program, I am more confident in my ability to coach an employee's performance.

The objectives of the program were clearly presented.

Opportunities to ask questions and discuss issues were sufficient.

The session was well organized.

The best part of this program was:

The program could be improved by:

Additional comments:

I would recommend this session to others (Circle one.)

We Need To Talk: Coaching To Employees

Overhead

Session Objectives

Prepare for the performance meeting

Focus on the employee's performance issues

Explore the causes of the employee's poor performance

Seek agreement with the employee on how to solve the problem(s)

Explore options for improvement

Agree on a plan for improvement

Review and evaluate the performance meeting.