

Course Name

This course prepares directors and above to coach and inspect coaching of his/her team.

Learners will be expected to:

- *Demonstrate the **ideal behaviors of a coach** to properly execute during coaching sessions and discussions.*
- ***Inspect coaching quality** of team through observations, documentations, and surveys.*
- ***Use documentation systems** to document conversations about opportunity and celebrate success according to the prescribe structure.*
- ***Execute the DIRECT Feedback Model** to conduct effective coaching sessions to employees.*
- *Demonstrate moving from **coaching to follow up**.*
- *Use Dashboard, the DIRECT feedback model, and the Coaching Loop to **identify root causes**.*

Day 1: Market Leaders	
Introduction (15 minutes) 8:30-8:45	
<ul style="list-style-type: none"> • <i>Introductions</i> • <i>Agenda</i> • <i>Ensure Out of Office Message is on</i> • <i>Check pre-work is complete</i> 	15 min.
The Coaching Culture (60 minutes) 8:45-9:45	
Leadership Welcome and Journey of the Coaching Culture (past, present, future of culture shift) <ul style="list-style-type: none"> • <i>Video of a Leader sharing the vision of Coaching and showing the timeline of the shift.</i> • <i>Why is the new coaching culture important – business impacts</i> 	5 min.
Review Leaders as Coaches – DIRECT, Coaching Loop, ELM <ul style="list-style-type: none"> • <i>High level review using posters and/or PPT.</i> <ul style="list-style-type: none"> ○ <i>Ask participant to share what each part of DIRECT means in their own words</i> ○ <i>What has been the most difficult or most often skipped part in the coaching loop?</i> 	5 min.
Triad Coaching Practice <ul style="list-style-type: none"> • <i>Conduct a Triad Role Play</i> <ul style="list-style-type: none"> ○ <i>Purpose: Evaluate base level of coaching/review DIRECT and coaching loop.</i> ○ <i>Select coaching topic from pre-work</i> ○ <i>Conduct role play in groups of three (triad)</i> ○ <i>Debrief:</i> <ul style="list-style-type: none"> ▪ <i>What went well?</i> ▪ <i>Did the coach hit all areas? How, or how not?</i> 	30 min.
Review and discuss Action Plans created in LaC* <ul style="list-style-type: none"> • <i>Pre-work – review action plan and answer questions – What’s going well? Where do you still need practice? Etc.</i> • <i>Discuss:</i> <ul style="list-style-type: none"> ○ <i>Discussion Objective – Self-evaluation of previous action plan. Determine what worked and where was not fully implemented. Re-commit to coaching.</i> ○ <i>What has been effectively implemented?</i> ○ <i>Where have you had trouble implanting? Why?</i> ○ <i>What areas have you developed hat weren’t part of your original plan?</i> ○ <i>What have you been surprised by in coaching and developing your employees?</i> 	5 min.
Perceptions of Coaching – discuss findings from coaching indicators of direct reports and your front line*	10 min.

Course Name

<ul style="list-style-type: none"> • <i>Pre-work – Pull eNPS (if applicable) I&E, and other coaching indicators. Answer questions based on trends – look for words including coaching, feedback, fear, positive and negative, etc. What does it tell you area areas of strength, best practices, areas of opportunity? Two sets of questions – one specifically focused on Direct reports, the other on your reporting structure as a whole.</i> • <i>Discuss in groups:</i> <ul style="list-style-type: none"> ○ <i>Discussion Objective – Identify areas of strength and opportunity.</i> ○ <i>Based on the feedback, what areas are you doing well?</i> ○ <i>Did you look at this before and adjust you coaching any?</i> ○ <i>Were you surprised by some of the comments and indicators? In what way?</i> ○ <i>How can you use this information to help you develop as a coach?</i> ○ <i>What was the most impactful comment you saw?</i> ○ <i>Whole group debrief:</i> <ul style="list-style-type: none"> ▪ <i>What are the common themes in your group?</i> ▪ <i>Discuss and themes – e.g., what’s the difference in coaching and micromanaging?</i> • <i>Opportunities to share success and best practices in:</i> <ul style="list-style-type: none"> ○ <i>Team members who are good coaches</i> ○ <i>Impacts you’ve seen from coaching</i> <ul style="list-style-type: none"> ▪ <i>Coaching tactics</i> 	
<p>Set goals for course</p> <ul style="list-style-type: none"> • <i>Based off information reviewed set 2-3 goals for the areas where you want to develop during the course. You will think about these goals during role plays and seek best practices from your peers. Possible topics – being more positive, following up, asking more discovery questions, documenting</i> 	5 min.
<p>Documenting (60 minutes) 9:45-10:45</p>	
<p>Overview of MyCoach and PDTS</p> <ul style="list-style-type: none"> • <i>Pre-work – review differences, pull documentation and reports in each system</i> • <i>Very brief overview/comparison of PDTS and MyCOACH</i> <ul style="list-style-type: none"> ○ <i>Show of hands – how many have used MyCOACH?</i> ○ <i>Why do you need to know MyCOACH? (it’s coming for managers in Q3 or 4. Know what’s going on in the field, inspecting documentation)</i> ○ <i>Walk through high level parts – we’ll dig in during other sections</i> 	10 min.
<p>What Right Looks Like*</p> <ul style="list-style-type: none"> • <i>Pre-work – Review document that shows What Right Looks Like (positive language, clear expectations, appropriate level of detail, when to documents, best practices)</i> • <i>Pre-work – use provided What Right Looks Like document to spot check your own documentation. Pull one from recently, one from ~4 months ago, and one from just after you attended LaC.</i> • <i>What Right Looks Like document discussion:</i> <ul style="list-style-type: none"> ○ <i>Discussion objective – Buy into guidelines as a helpful tool.</i> ○ <i>Why have these guidelines?</i> ○ <i>Do they help?</i> ○ <i>What best practices have you found/seen?</i> ○ <i>Did you find areas to improve? If so, what?</i> ○ <i>Where there places you’ve developed and/or slacked off?</i> • Analyze and discuss 1-2 real examples in small groups (2-3 people). <ul style="list-style-type: none"> ○ <i>What is done well?</i> ○ <i>What could be improved?</i> ○ <i>What the root cause addressed?</i> 	20 min.

Course Name

<ul style="list-style-type: none"> ○ <i>Is there a clear action item/plan?</i> ○ <i>Reword based on guidelines</i> ○ <i>Debrief:</i> <ul style="list-style-type: none"> ▪ <i>Share you're new wording.</i> ▪ <i>Did the examples provide you with enough info if you were the individual's new manager?</i> 	
<p>Partner Activity – create documentation based on earlier role play.</p> <ul style="list-style-type: none"> ● <i>Conduct Activity:</i> <ul style="list-style-type: none"> ○ <i>Activity objective – Self-evaluation of documentation to identify areas of strength and opportunity.</i> ○ <i>Document coaching conversation from opening activity.</i> ○ <i>Trade documentation with a peer in your group.</i> ○ <i>Review documentation so you can coach him/her on documenting.</i> ○ <i>Provide coaching using DIRECT.</i> ○ <i>Document the coaching conversation.</i> ○ <i>Trade documentation, inspect and provide feedback.</i> ● <i>Whole class debrief:</i> <ul style="list-style-type: none"> ○ <i>How did it feel providing feedback on documentation?</i> ○ <i>What feedback did you provide to your peer?</i> ○ <i>What areas did you need to tweak?</i> ○ <i>What's the biggest challenge when documenting?</i> 	30 min.
<p>Be Specific (60 minutes) 11:00-12:00</p>	
<p>My Success Plan/My Success Check in– having focus, using recognize skills to bridge to opportunities</p> <ul style="list-style-type: none"> ● <i>Pre-work – prepare for 1-2 employee Manager Action Plans as if it were almost the end of the month. Only prepare (pull info from Dashboard and other areas.)</i> ● <i>Brief discussion –</i> <ul style="list-style-type: none"> ○ <i>What is the purpose?</i> ○ <i>How do you choose areas?</i> ● <i>Present best practices:</i> <ul style="list-style-type: none"> ○ <i>Make the topics general enough to accommodate shifts if product focus.</i> ○ <i>Look for a specific behavior you want to address.</i> ○ <i>Tie that behavior(s) you want to improve to something he/she is doing well.</i> 	5 min.
<p>Be specific</p> <ul style="list-style-type: none"> ● <i>Discussion –</i> <ul style="list-style-type: none"> ○ <i>Discussion objective – Specific goals are measurable and make accountability clear.</i> ○ <i>Show examples from MyCOACH – how can you measure improvement on “be consistent” as a goal?</i> ○ <i>Why are specific behaviors easier to manage? (the easier it is to hold them accountable)</i> ○ <i>Evaluate examples as a class or small group</i> ● <i>Practice on using questions to get to specifics (e.g., Not just need to demo, but what does a demo look like?)</i> <ul style="list-style-type: none"> ○ <i>Identify a goal you've given and is documented in PDTS or MyCOACH that is not attainable (pre-pulled samples available if need)</i> ○ <i>Identify the flaws with the goal (in workbook)</i> ○ <i>Write question you can ask to get to root issue and find out specifics</i> 	10 min.
<ul style="list-style-type: none"> ● Triad Coaching Activity: Manager Action Plan (or Manager Action Plan follow up) 	45 min.

Course Name

<ul style="list-style-type: none"> ○ Use manager information collected in pre-work. ○ Let “employee” know the situation. ○ Hold Manager Action Plan discussion. ○ Coach provides feedback. ○ Rotate and go through each person 	
Tools and Resources to Identify Root Causes (50 minutes) 1:00-1:50	
<p>Will or Skill</p> <ul style="list-style-type: none"> ● The root cause comes from two areas - Will or Skill ● Discuss and fill in info in PG: <ul style="list-style-type: none"> ○ Discussion objective – Use a will and skill determination to identify root cause. ○ What does Will or Skill mean? ○ How can you determine which? (key words “my customers don’t need..”, area not compensated, etc) ○ Why is finding the root cause important? (need to determine if motivation or training will help, waste time on the wrong approach) ○ How often do you really feel you truly get to the root of the issue? ○ Why is it so hard to find the true cause? (embarrassed, don’t want to mention faults, give the answer they think you want to here) ○ “I don’t have time.” – is it will or skill? (prompt until participants determine Skill – time management. If they say will, lead to the fact it’s not the root cause then, motivation or other factors is the root cause.) <ul style="list-style-type: none"> ▪ Will – the individual CAN execute, how every lacks buy in. May not see what’s in it for themselves, the company, or the customer. Could perform with the right motivation. ▪ Skill – the individual lacks the ability. This could be knowledge, confidence, or inability to perform aspects of the actions required, e.g., transition to the product. Needs support – role plays, training, pep talk, observing other, etc. 	<p>10 min.</p>
<p>Using the Dashboard</p> <ul style="list-style-type: none"> ● Pre-work – follow directions to look for trends (need materials to provide guidance and what trends we want them to find, e.g., Individual who has a drop is an area over the last 6 months; individual who is successful in one strategic product but low in another) ● Guided self-discovery on how to use the Dashboard and it’s integration in MyCOACH to evaluate numbers. ● Best practices and guidance on utilizing lesser known features of Dashboard and MyCOACH to evaluate and identify trends and metrics <ul style="list-style-type: none"> ○ Emphasize metrics is the symptom, not the root cause. 	<p>30 min.</p>
<p>Activity on using questions to get to a root cause</p> <ul style="list-style-type: none"> ● Explain Socratic Method – using open ended questions to teach. Give examples in PG. ● Pull real scenarios – give one partner the root cause and the other a description of a reason for coaching ● Coach can only ask questions ● Debrief: <ul style="list-style-type: none"> ○ Biggest challenges? ○ Share best practices. 	<p>15 min.</p>