

COACHING CHECKLIST - PREPARE FOR A FORMAL COACHING CONVERSATION: Employee's Growth and Development

- | | Yes | No |
|--|--------------------------|--------------------------|
| 1. Does the employee know what is expected? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Has the job description, skills and knowledge been defined? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Has the employee been trained? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Does the employee understand the organizational culture? | <input type="checkbox"/> | <input type="checkbox"/> |

1. What is the objective for coaching? Describe the difference between the present performance level and the desired performance level.
2. What future performance expectations do I have for the employee?

7. Describe the effect the current performance has and results of future performance on...

Effect Current Performance	Results Future Performance
A. You: _____	_____
B. Employee: _____	_____
C. Co-Workers: _____	_____
D. Company: _____	_____
E. Others: _____	_____

- | | | |
|--|--------------------------|--------------------------|
| 8. Does the employee have resources to do the job?
If no, what does he or she need? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Are obstacles beyond the employee's control affecting performance? What? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Have I been giving feedback? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Have I been rewarding ineffective performance by ignoring it rather than coaching to improve it? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Do I have notes and documentation that will help the discussion? | <input type="checkbox"/> | <input type="checkbox"/> |

(Adapted from *Coaching for Improved Work Performance*)

ACTION 1: Set the stage for the coaching conversation.

- a. Remove distractions.
- b. Build rapport, ex. ask what is going well for them and what is frustrating them, share appreciation for their work, etc.
- c. State the purpose [objective] and process of the coaching conversation.

ACTION 2: Detailed discussion of the performance behavior (s).

- a. **Behavior:** discuss the performance behavior(s). Always focus the coaching on just a few key things, one to three at most.
- b. **Effect:** discuss the effect that the current performance behavior(s) have on the employee, others, you, customer and the company.
- c. **Expectation:** discuss future performance expectations [employee's and leader's].
- d. **Results:** discuss positive results for future performance behaviors. Link results to success of employee, team, company, customer, etc.

ACTION 3: Gain commitment for growth and development.

- a. Create action steps for successful growth and development; should be specific and contain a time deadline.
- b. Ask for employee's input when developing action steps. Remember to listen to the employee's own assessment of the situation.
- c. Express confidence in the employee's ability to be successful.
- d. Monitor progress; reinforce efforts made. Follow-through and follow-up.

A. Constructive feedback:

1. Stay calm (no threats, scolding, and joking).
2. Be specific and direct; keep the focus on the work-related aspects of the problem, avoiding personal criticism.
3. Allow response from employee.
4. Ask employee how they can make expectation happen.
6. Make it clear that you are interested not only in requiring that the employee change, but in helping the employee, as well, in any way you can.