

1 0   S T E P S   T O

# Successful Coaching



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Alexandria, Virginia

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## 1 0   S T E P S   T O   S U C C E S S

Let's face it, most people spend their days in chaotic, fast-paced, time- and resource-strained organizations. Finding time for just one more project, assignment, or even learning opportunity—no matter how career enhancing or useful—is difficult to imagine. The *10 Steps* series is designed for today's busy professional who needs advice and guidance on a wide array of topics ranging from project management to people management, from business planning strategy to decision making and time management, from return-on-investment to conducting organizational surveys and questionnaires. Each book in this ASTD series promises to take its readers on a journey to basic understanding, with practical application the ultimate destination. This is truly a just-tell-me-what-to-do-now series. You will find action-driven language teamed with examples, worksheets, case studies, and tools to help you quickly implement the right steps and chart a path to your own success. The *10 Steps* series will appeal to a broad business audience from middle managers to upper-level management. Workplace learning and human resource professionals along with other professionals seeking to improve their value proposition in their organizations will find these books a great resource.

## P R E F A C E

I believe that really effective supervisors always have been terrific coaches. I believe there are coaches among us, disguised as our colleagues, friends, and family members. These are the people we know we can count on to listen to us, encourage us, challenge us, and help us achieve our biggest dreams.

Many of them make the conscious choice to act as that sounding board and champion; others don't even realize they're doing anything out of the ordinary and are surprised when their colleagues consider them to be great coaches.

I am one of those people who chose to develop coaching skills. To be honest, I wasn't naturally approachable in the workplace and didn't believe my personality was "bubbly" enough to be effective as a coach. But after working as a corporate trainer for almost 20 years, I began to find that pulling people away from their jobs to attend classroom training wasn't working anymore. To appeal to a diverse audience, the content of these workshops was too watered down. Many of the situations discussed didn't apply to the people in the room—each with his or her own level of knowledge and experience about the topic. So, in my last job, as employee development manager for the city of Redwood City, California, I changed our development strategy and brought customized, relevant, one-on-one interventions to the individuals in the workplace. In essence, I invented my own type of coaching, and it had a powerful, positive impact not only on the recipients but also on me. I found myself happier and more effective at producing growth and development. I decided to learn more.

*10 Steps to Successful Coaching* summarizes what I've learned on my coaching journey, and it offers a meaningful process for embracing your existing coaching skills and interjecting more of them

into your current work style and environment. Coaching uses the strengths you already have as a leader, colleague, or employee to bring out the strengths of others. As such, it's not about scrapping who you are to become someone else. It's just about connecting with others in a new way. It's about adding new exercises, processes, and questions to the work you do to produce results that are more rewarding and exciting.

My goal for the book is to help you become happier in your role as manager, employee, friend, partner, or parent by becoming more coach-like in your daily interactions.

I've experienced this process as both client and coach, and I've seen the transformations it can produce, so I'm excited for you in what you're about to undertake.

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*Sophie Oberstein*

*April 2009*





# I N T R O D U C T I O N

- ◆ *Joan managed four employees who'd lost their edge. Sure, they still got their work done and met all performance targets, but they didn't seem to be thinking as creatively as they once had. They didn't seem to be having any fun and no longer seemed passionate about their work.*
- ◆ *It had always been assumed that Larry would move into his boss's position when the boss retired. But one week after the retirement was announced, Larry made his own announcement: He was leaving to take another job. In an exit interview, he explained that he didn't see a fit for himself with his boss's job. He didn't want a "desk job" and didn't want to keep the hours his boss had kept.*
- ◆ *Amy was an exceptional manager. Her staff adored her. She'd made huge strides for her department and always got glowing reviews. Lately, however, co-workers could sense that she was stressed. She had less time for people, often interrupted them, and was always rushed and abrupt. When asked, she said that she felt overwhelmed. When she was at work, she felt like she was cheating her employer by not being able to give her all; and when she was at home, she felt the same way about cheating her family.*

For a long time, these types of workplace issues were commonplace, but they weren't regarded as anything managers really should, or could, address. Today, however, individuals in organizations are more willing to take on these types of issues. In fact, they are being asked to do so. One of the ways that managers have been tackling them is by adding coaching skills to their repertoires.

As table I.1 indicates, coaching has evolved in the workplace over the past decade. Once seen as a punishment for being “rough around the edges,” coaching is now a perk for those being groomed for positions of greater responsibility. Coaching skills are becoming critical management competencies as organizations prepare a new generation of leaders, using fewer financial, human, and training resources. An explosion in the coaching market in recent years highlights the fact that the work environment continues to be complex, fast-paced, and pressured, and that employees at all levels can derive value from personalized, skilled help delivered in a structured, safe, one-on-one situation. Additionally, the number of people turning to life coaches outside of work demonstrates a new level of acceptance for seeking help to get more out of life.

Coaching isn't just about patting people on the back or providing enthusiastic encouragement. It's a powerful management tool to help employees realize their career aspirations. When managers and supervisors master the art of coaching, their relationships with their direct reports are strengthened—and that often translates to increased company loyalty and enhanced motivation among those reports.

## Who Should Read This Book?

This book is an entry point for managers who want to initiate a formal coaching process with their employees, and for anyone who wants to infuse his or her day-to-day interactions in the workplace with a powerful new skill—development through coaching. Employees at all levels, with varying degrees of experience, can benefit from the activities and exercises included here. The book also is for readers who understand that applying these skills will help them in their broader lives. Each of the 10 steps ends with ideas for using its concepts as part of a coaching process or informally in the daily activities of managing others.

This is a primer, so those who have been through a coaching program in the past may find it a good review and may pick up some new exercises or tools. But, chiefly, it is for people who've

# TABLE I.1

## Coaching Trends

Coaching Then (a Decade or So Ago)	Coaching Now
Considered a punishment for “bad” managers and those who were “rough around the edges”	Considered a perk for employees with potential; is a retention tool for high-performing managers
Provided by internal HR professionals and trainers or by hired external coaches	Essential leadership attribute
Stand-alone activity	Part of organizational initiatives, such as succession planning; is used in concert with mentoring and organizational networking
Directive, focused on specific skills or goals	Either directive or nondirective, emphasizing the learning process and ongoing growth and development
Less known and understood; membership in the International Coach Federation (ICF) was just under 4,000 in 1999	Growing and more accepted profession; ICF membership increased to more than 14,000 in 2008

only just recognized—or been intrigued by—the power of coaching. Maybe you’ve witnessed a great coach in action; maybe you realize your direct reports aren’t working to their full potential, or that you aren’t working to your potential as a leader. Maybe you simply want more out of your experience at work—the chance to connect with others at a deeper level and to promote learning and growth on the job.

This book won’t turn you into a coach, but it will make you more coach-like. Let me try an imperfect metaphor to show you the difference. Sometimes, when I’m feeling sick, I have to go to a trained and licensed medical doctor. She can deal with my more serious health concerns and she knows the right doses of medication

for me to take. At other times when I'm not feeling 100 percent, I just need someone to make me a bowl of chicken soup or to send me to bed. Some of the best medical advice I've gotten has been from nurses taking my temperature before the doctor comes into the room or from a fellow patient in the waiting room.

In the same way, sometimes an employee needs to work with a trained and experienced coach. His issues might be more all encompassing than his manager feels prepared to handle, he might need someone who's fully trained to work with a broad spectrum of emotional responses, or he might just need the confidentiality an outside party can provide. At other times, all an employee needs to feel more balanced and in control is you—someone who can be coach-like—pulling out tools and asking questions that make him feel better.

There certainly are some purists out there who would say that if it isn't a certified coach using a certain coaching model, it isn't coaching. I ask, Why does that matter? If the employee feels and performs better as a result of the attention of someone acting like a coach, it doesn't matter what you call it. You can even call it coaching.

## A Note About Naming

While we're on the subject of what to call things, I have to admit I had some trouble figuring out what to call the people you'll be coaching. Some of you will do this informally with your colleagues, direct reports, or friends. Others will do it in a more structured manner either with people you know and work with or with strangers. So I couldn't describe them all as co-workers or direct reports. I call the people I coach "clients," but that implies some sort of formal business relationship that some of you may not have. That term is also a little more clinical than I like. So I went with the made-up word "coachee" (much to my spell-check's dismay!). If "coachee" doesn't describe the person sitting in front of you, please feel free to substitute whatever word works for you and insert that word wherever I refer to the coachee in these pages.

## Sequence of the Steps

In coaching, I try to hold what I call a “soft focus.” That is, I have a focus I need to keep my client aware of—one that the two of us create together—but I also need to be free to let go of that agenda to work with what my client is presenting to me at the moment. I can’t be rigid about what we’re doing together. I have to maintain the focus but be free to move from it.

This need for flexibility could make it difficult to put the work of a coach into a series of sequenced steps, but the more I look at the prevailing coaching models, the more I see that there is some order to coaching. Therefore, I recommend you address these 10 steps with a soft focus, following the logical and proven methods but being willing to bend when the situation requires. You’ll want to keep the step sequence in mind as an ideal way to do things—and you’ll want to remember that there will be times you won’t follow this sequence. You may complete a step and find you have to go back to it. For instance, you may have agreed on the logistics of your coaching relationship in Step 3 but find you have to revisit them later when you’re on Step 7. During your first conversation, your coachee may jump ahead to Step 8: Realign When Things Go Bad. Once realigned, you can resume Step 1. You may find that one step takes only a few minutes and another takes a few months. All of these variations are workable when you have a soft focus—an awareness of where you want to be, but one to which you’re not wedded.

Another way to use this book is to put it right in to practice. Read Steps 1 and 2, and then pick a coachee. Do the rest of the steps one-by-one with your coachee. Explain to her or him that you’re learning as you go so that at each step you’ll be practicing different skills and adding more exercises during your interactions.

Remember, too, that you can use the tools and ideas in each step even if you aren’t doing a formal, step-by-step process. Using what’s offered here in any of your day-to-day interactions as a manager will produce better results from your employees and deepen your relationships with them.

## An Overview of the 10 Steps

- ◆ **Step 1: Prepare Yourself for the Coaching Role**—Before you can coach others, you have to spend some time thinking about what coaching means to you, what your coaching goals are, and what characteristics you need to embody to achieve those goals.
- ◆ **Step 2: Remove Personal Obstacles**—Aside from the practical considerations of being a coach to your employees addressed in Step 1, there is some deeper preparation that it would benefit you to undertake. Being a coach demands focus and mental energy. If you really want to coach, you have to be willing to look inward. You have to know yourself, what you're capable of, and what you want to avoid. You have to be able to be present with whatever your coachee brings your way. You may need to unload some emotional baggage—including a lack of confidence in your ability to coach—before you can be effective. Only after you've considered these issues yourself will you be able to address them with your coachees.
- ◆ **Step 3: Create Your Coaching Relationship(s)**—It's one thing to ready yourself for coaching; it's another thing completely to articulate what you want to do for others and to find the right people to coach. When you put yourself out there as a coach, you are displaying vulnerability, strength, and marketing savvy all at once. This is also the step during which you'll discuss how you and your coachee will work together—a very important foundation for the coaching process.
- ◆ **Step 4: Find Out About Your Coachee**—A coaching relationship can be a powerful engine for growth and change, but only if there is a deep sense of trust between coach and coachee and if the coachee truly feels known by the coach. Creating this in-depth relationship is the foundation of coaching and will set you and your coachee on the path to success. You'll use this knowledge of your coachee and how he or she “works” over and over again in the later steps.

- ◆ **Step 5: Agree on What You Want to Accomplish**—Even some of the most eager coachees sometimes enter a coaching relationship unsure about their focus issues and goals. They may be unaware of some of the areas in which they need coaching, although their bosses, colleagues, or friends can see them clearly. Coaching goals need to focus not only on what coachees want to accomplish, but also on who they want to become as they accomplish these things. As such, agreeing on what the two of you want to accomplish through your work together is more than just standard goal setting. To ensure that coaching actually is closing the gap between where the coachee is and where he or she wants to be, accountability that comes from establishing these expectations has to be built into the relationship.
- ◆ **Step 6: Use the Power of Possibility**—Coaching comes from an expansive rather than a limiting place. Coaches need to help their coachees think more broadly about themselves and what they're capable of accomplishing. Responding to powerful questions posed by their coaches, coachees come to recognize their own greatness and the possibilities that are available to them.
- ◆ **Step 7: Partner to Enhance Growth Between Sessions**—A goal of coaching is to help your coachee become self-sufficient. You can jump-start this process with assignments for coachees to complete between coaching sessions. Assignments serve to help the coachee notice what is happening for her or him, try out new approaches, or take action toward achieving specific goals. The way these assignments are created and given is quite different from the way you remember getting homework!
- ◆ **Step 8: Realign When Things Go Bad**—Coaching relationships can unleash more emotion than your standard manager–employee conversation; so, by their very nature, they have the potential to hit potholes. This step will help you recognize the signs that coaching is derailed and then help you learn how to realign the relationship and

troubleshoot a variety of problems that can crop up in the coaching process.

- ◆ **Step 9: Maintain Positive Changes**—The beginning of a coaching relationship can be exciting and invigorating for both parties. There comes a point, however, when the initial energy is wearing off; when the coachee, who's made significant changes early on in the process, starts to revert to the way she or he used to be or used to do things. Knowing how to coach at this step helps keep your time together from growing stale and helps your coachee continue to move forward.
- ◆ **Step 10: Complete the Coaching Cycle**—Many coaching relationships continue long after they've ceased being beneficial. Knowing when and how to end a coaching relationship ensures that the progress you and your coachee have made together is integrated into how the coachee lives and works going forward. Likewise, from each coaching relationship you complete you learn much that will help you continue to be engaged and excited about yourself and your coaching. Bringing an appropriate end to the coaching relationship will help both parties confirm achievements made and lessons learned.

After reading and working through these 10 steps once, review them periodically. They'll inspire you with new questions to ask and new tools to use in your coaching.



Being a coach to the employees you manage can be a very powerful experience. You have the opportunity to inspire those around you to achieve great things for themselves—at work and outside of work—and to experience greater happiness. And, in the process, you'll become more self-aware and effective. So, go forth and coach!



# Prepare Yourself for the Coaching Role

## OVERVIEW

What is coaching?

What isn't coaching?

What makes a great coach?

Why coach?

In writing this book, I contacted many people whose job descriptions didn't include anything about coaching, but whose colleagues identified them as terrific coaches. Why did they think that these individuals were coach-like?

- ◆ "He hired us, groomed us, and then pushed us to get promoted and take on positions and roles that were higher than his in the corporate world."—Hassan Ramsey, speaking about Dr. Tathagata Dasgupta, University of California–Irvine
- ◆ "He mentored and was there for his people."—Joyce Irby, describing Barry Weiss, director of City of San Carlos Parks and Recreation
- ◆ "He is always the person who finds the potential in others, and in ideas. He finds the reasons to say 'yes' rather than 'no.'"—Sarah Larson, speaking about Chris Emery, director of marketing at Insight Imaging

Though none of the people described above is trained or working as a coach, those who report to them or work alongside them

regard them highly for their coaching abilities. The individuals don't see themselves as coaches at all; rather they believe they are simply good leaders. None of them was recognized as a coach for the same reason, and none of them coaches employees in the same way.

What does all this tell us? Quite a bit. First, we learn that there simply is no right way to coach—and we wouldn't want there to be. A one-size-fits-all approach to coaching couldn't be effective for the diverse interests and experiences of individuals in the workplace. That means that you are the very best coach for some particular person and a less-than-ideal coach for someone else. It means that if you coach several people, you might have to do it differently for each one of them. Second, it tells us that you don't need to be trained as a coach to be effective as one. More broadly, it says that anyone can be like a coach to others and that no matter what you do in that role, it will be appreciated.

## What Is Coaching?

Asking this question is like asking, What is leadership? The answer depends on whom you ask and where you look. Definitions abound. There's a glut of information available that becomes repetitive at best and often is contradictory. As is true in defining leadership, the important thing in defining coaching is to find which voices in the field you agree with and trust. Find a definition that works for you and stick with it. You'll never get everyone out there to agree, so you just need to find the definition that resonates with you.

Here's the definition I use: Coaching is a meaningful, accountable relationship created by having routine one-on-one conversations about the coachee's full experience and the power of possibility.

Every word in that definition is important. Let's break it down:

- ◆ **Meaningful**—Coaching is not a superficial conversation. It's not your weekly project check-in or planning meeting (although, if you have no other time, these are good places to sneak in a little coaching). Coaching is an opportunity to step outside the day-to-day pressures of work to focus

on deeper issues, such as what makes the employee fulfilled and productive at work.

- ◆ **Accountable**—Without accountability, coaching conversations are simply that—conversations that don't lead to any lasting change or to growth and development. Coaching includes check-ins on assignments and measurements of progress toward goals.
- ◆ **Relationship**—A relationship needs more than one person to make it work. Coaching is a two-way model built on trust and mutuality.
- ◆ **Routine**—Coach and coachee should get together with some regularity—and this doesn't mean at annual performance review meetings! You and your coachee will decide what frequency makes sense, depending on your schedules and on the coachee's goals. Regular meetings enhance trust, accountability, and progress.
- ◆ **One-on-one**—Just by taking the time to be alone with your employee, you show her you value her and are invested in her growth and development. Deeper, more intimate relationships are formed when two people work together as coach and coachee.
- ◆ **Full experience**—When you come into the office, you don't check your outside life at the door. Whatever is going on for you at home comes to work with you, and vice versa. Wherever you are, you're a whole person living a full experience. When a coach shies away from allowing the coachee to share her full experience, the coach is discounting that person's values, dreams, and motivations. Therefore, there are practically no limits on what can be included in a coaching conversation.
- ◆ **Power of possibility**—Coaches have to encourage their coachees. When a coachee doesn't believe in herself, or when no one else believes in her, the coach has to help illuminate the power of possibility for the coachee—help her understand what choices actually are available and let her make conscious choices. Uncovering possibilities helps people get out of situations in which they're stuck or in

conflict. This component of coaching often requires coaches to show coachees the greatness within them that makes their success possible.

That's my definition. If it doesn't resonate with you, try some of the following ways to arrive at your own definition:

- ◆ Think about someone who's been a good coach to you. This need not be someone who was acting officially as your coach. It need not have been in the workplace; maybe it was a teacher, a sports coach, or someone from well in your past. Make a list of this person's best qualities. What did she or he do that was coach-like? Pose the same questions to people around you to get their input. Use the characteristics and examples on your list to craft your own definition of coaching. So, if you remember that your high school guidance counselor was a great coach to you because she displayed good listening skills and she created a plan for you that was completely individualized, you might come up with a definition something like this: "A coach is a person who listens intently to guide you on a personal journey."
- ◆ Enter the keywords *coach* and *definition* in Google or another search engine and see what comes up. Look for themes among the definitions and words or phrases to which you relate. Use all of these pieces to craft a definition that works for you. Here are a few of the definitions for *coach* that I found in a recent search:
  - ◆ a railroad passenger car or motor bus
  - ◆ a person who trains or directs athletes or athletic teams
  - ◆ someone who supports, explains, demonstrates, instructs, and directs others via encouragement and questions; may include lifestyle advice, such as nutrition, exercise, behavior, and more
  - ◆ an ongoing professional relationship that helps people produce extraordinary results in their lives, careers, businesses, or organizations
  - ◆ a task in which the coach supports the client in professional matters to develop the client's own resources and solution-finding capabilities.

From those definitions, you might come up with something like this: “Coaching is moving people from one place to another in support of ongoing training or a specifically desired result.”

## What Isn't Coaching?

Although I allow for much latitude in defining what coaching is, I am pretty passionate about declaring what coaching is not. I'd like to debunk a few common myths about coaching. You've probably heard them before—you may even ascribe to some of them.

- ◆ **Myth #1: Coaching is giving advice.** Actually, coaching involves asking the questions that the coachee wouldn't think to ask herself so that she can access her own answers. It's intended to help people whose perspectives are so ingrained that they can't see their blindspots come to a new awareness of themselves. A coach needs to get rid of his own inclinations to give advice or to solve problems, even when the coachee is asking what she should do. Why is that? Why don't coaches give advice? First, providing advice builds dependency when you really want your coachees to solve their own problems and make their own decisions. Second, the advice you give may not be the advice that the coachee needs or that works for her at that moment. It may be something she's already tried that hasn't produced the results she wanted, or it might not inspire her to action. Third, there is no shortage of advice in people's lives. What's missing is a technique to process that advice and to figure out what advice makes the most sense to the coachee. That's where a coach comes in. Finally, coaches should not be wedded to any one solution or technique; and when the coach is the source of advice, he often expects the coachee to take it. Give advice and you're an adviser; help the coachee discover her own best advice and you're a coach.
- ◆ **Myth #2: The value of a coach is his knowledge and experience in the coachee's area of interest or endeavor.**

In fact, you can get great coaching from someone whose experience is completely unrelated to your current circumstances, or from someone who is your junior in chronological age or working years. A coach's value lies in helping the coachee access her own knowledge and experience and bring them to bear on current circumstances and future goals. The spotlight is on the greatness in the coachee, not on the greatness or expertise of the coach. That's what sets a coach apart from a mentor, whose value *is* based on his knowledge and experience and how he can impart them to his protégé.

- ◆ **Myth #3: Coaching is just like therapy.** If you listen to an individual coaching session, it may sound like therapy.

Deep issues are being discussed and emotions are welcome. But there are two primary differences between coaching and therapy. The first difference relates to the severity of the presenting circumstances in the coachee's life. The second difference is the absence of any analysis of how a coachee came to be in her current circumstances. Coaches won't ask, What happened in your past to bring you to this situation? Instead, they'll take it at face

value that this is where the coachee is. It's rather like saying you're here and you want to get over there, so let's get moving! Coaching has a present and future focus, and it doesn't delve into the past as therapy might.

- ◆ **Myth #4: The coach drives the coaching process.** I once was looking for individuals to become coaches in an organization and was met with very limited response. As I tried to understand why, I was told that in the company's previous coaching program, the people who'd volunteered as coaches had gotten burned out. They'd worked really hard on their coachees' behalf—some had been doing such things as writing résumés or presentations for their coachees. It took me a long time to break through this

## POINTER

The greatest good you can do for another is not just to share your riches, but to reveal to him his own. — Benjamin Disraeli, statesman and writer

mindset and help the potential coaches in my program understand that the actual driver of the coaching process is the coachee. She sets the agenda for meetings, she works in concert with the coach to craft the assignments she will complete, and she takes action in her situation. It's also true that what she puts into coaching is in direct proportion to what she gets out of it. When the coach calls the meeting, determines the agenda, and assigns the homework, the coach is acting as the employee's boss. Workplace coaching is especially challenging in this regard. How do you go from being someone's boss in some situations to being her coach in another? (This will be addressed in Step 3.) Coaching is a delicate two-way relationship, and the coach does have an important role to play in keeping to the focus the coachee has set, providing feedback on how the process of coaching is going, and checking in for accountability. It's just that coaching is for the coachee, so she gets to create it and to be responsible for it.

## What Makes a Great Coach?

Maybe you are a natural-born coach, or maybe there are some skills for you to learn. Worksheet 1.1 will help you determine how you measure up against several competencies important for coaches. Please note that the list of competencies is not necessarily comprehensive. As much as I'd like to, I can't provide an exhaustive list of qualities or characteristics that a coach needs to have. However, the list in worksheet 1.1 takes into account the competencies put forth by the International Coach Federation (the authoritative source for all things related to coaching) and several other existing programs and models, as well as my own experience.

**POINTER** It's never too late to be who you might have been. – *George Eliot, author*

STEP  
1

# WORKSHEET 1.1

## My Coaching Competencies

**Instructions:** For each competency listed in the first column (and described in column 2), consider how your employees or co-workers would rate you—poor, fair, good, or excellent. Circle the appropriate term in the third column. Feel free to also ask a few people to complete the survey for you. Tell them you’ll appreciate their honest responses because it’s part of your development as a coach.

Competency	Description	How am I doing in this area?
Self-management	Do you know your own strengths and weaknesses? Can you maintain focus on your coachee, rather than on what is going on for you?	Poor Fair Good Excellent
Listening actively	Do you practice the skill of active listening by focusing on the speaker and reflecting the essence of what she’s said? Do people come to you because you are a good listener? Do you “listen” to nonverbal communication?	Poor Fair Good Excellent
Being curious	Do you want to know all that you can about people? Do you ask questions to uncover what the people you are talking to are experiencing? Do you have a natural curiosity?	Poor Fair Good Excellent
Asking powerful questions	Can you stop people in their tracks with a question that gets them thinking? Do you know the benefits of questioning rather than providing answers?	Poor Fair Good Excellent
Refraining from giving advice	Can you hold your advice back to let the coachee discover her own best advice? Do you help employees find their own solutions? Can you refrain from butting in when the coachee’s own answers aren’t what you had in mind for her?	Poor Fair Good Excellent
Keeping confidentiality	Do you treat confidentiality as essential? Do you refrain from sharing with others the “stuff” that happens at work? Do you keep private what you hear in private? Do you get permission before sharing someone else’s experience? Do you leave out names and identifying information when sharing stories?	Poor Fair Good Excellent



## Worksheet 1.1, continued

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Competency	Description	How am I doing in this area?
Being present	Can you put the rest of the day's urgencies out of your mind to be there for your coachee? Can you shut off the phone, email, and all other distractions? Can you be in the moment?	Poor Fair Good Excellent
Consistently making time	Do you regularly meet with employees? Do you keep meetings with them as sacred as you do those with clients or customers? Do you get back to people within 24 hours of their initial contact?	Poor Fair Good Excellent
Giving constructive feedback	Do you have a healthy attitude toward feedback as a development tool, and do you offer feedback that is specific and helpful? Do you provide regular feedback about your employees' job performance? Do you hold postmortems at the end of projects or at other significant milestones?	Poor Fair Good Excellent
Partnering to create assignments that move your coachee to action	How are you at brainstorming? Can you think creatively about what your coachee might do to move toward her goal? How well do you solicit the input of others when solving problems? Are you a motivator?	Poor Fair Good Excellent
Planning and goal setting	How are you at creating action plans? Do you work with a timeline? Can you create goals that are specific, measurable, realistic, and time-bound?	Poor Fair Good Excellent
Establishing accountability	Do you set and communicate standards of excellence and expectations? Do you follow up with those to whom you've delegated? Do you create accountability?	Poor Fair Good Excellent
Creating a coaching relationship through expectations and agreements	Are you explicit about the roles you play with your employees? Do you establish mutually acceptable agreements about how you will work with someone? Do you clarify how each of you best communicates at the start of a work relationship or project?	Poor Fair Good Excellent

*continued on next page*

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**Worksheet 1.1, continued**

Competency	Description	How am I doing in this area?
Being flexible	Are you willing and able to switch gears as needed? Can you think on your feet and make new decisions as new information becomes available? Do you provide freedom for your employees to do their jobs?	Poor Fair Good Excellent
Establishing trust and intimacy	Do people come to you with their problems? Do you have friends in the workplace? Do people trust you to do what you say you will do? Will you not shy away from emotional people and reactions?	Poor Fair Good Excellent
Respecting and appreciating the coachee	Do you view your employees as partners and see them as critical to your own success? Would you be happy for them if their accomplishments were greater than your own? Do you see their greatness and believe in them? Do you know the strengths of each of your employees and capitalize on those strengths? Do you look for the good in your colleagues and direct reports?	Poor Fair Good Excellent
Being open to the coachee's whole experience	Do you protect your employees from undue stress? Do you creatively encourage work/life balance? Do you see work as just one component of your own or your colleague's life?	Poor Fair Good Excellent
Thinking big for the coachee	Do you push people to do more than they think they are capable of doing? Do you encourage big ideas and dreams? Are you more a yes-sayer than a naysayer?	Poor Fair Good Excellent
Providing recognition	Do you give your employees credit when they deserve it? Do you celebrate successes? Do you balance your constructive feedback with positive reinforcement?	Poor Fair Good Excellent
Reading a situation	Can you read the energy in a room? Are you as aware of what's not being said as of what is being communicated directly? Do you have strong intuition?	Poor Fair Good Excellent

After assessing your current coaching competencies and with the definition of coaching fresh in your mind, it's time to consider some questions as you clarify and commit to your coaching role. The questions in worksheet 1.2 will highlight your existing coaching strengths to increase your level of confidence as you embark on coaching. They also help you identify the skills and characteristics you'll want to bolster to be more effective as a coach to your employees.

## WORKSHEET 1.2

### My Coaching Development Plan

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**Instructions:** Respond to the questions that follow. Questions 1 and 2 highlight your existing coaching strengths. Feel free to include those competencies rated highest on Worksheet 1.1 here, or other skills you possess that will make you effective as a coach. Questions 3, 4, and 5 focus on how you might want to improve as a coach. Answering them will give you a vision of what you seek to achieve as a coach and a plan for achieving it.

1. What leadership skills do I have that will serve me well as a coach?  

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2. What other skills/characteristics do I have that will serve me well as a coach?  

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3. What aspects of coaching will be a stretch for me?  

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4. In an area that's going to be a stretch for me, what does excellence look like? What will be happening when I am consistently excelling at performing this aspect of coaching?  

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5. What is something I can do today to move closer to a rating of "excellent" in that area?  

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## Why Coach?

Why should there be coaching in the workplace? Couldn't managers get great results from their folks just by being good role models or setting expectations and making people aware of them? Why should you talk to employees about their full experience?

You picked up this book, so I'm assuming there is something drawing you to coaching. What excites you about being more coach-like in your interactions with your co-workers? This is a good place

to pause and think about that question before you move any further. If it's helpful, use the Notes section at the end of this step to record your thoughts.

### POINTER

I personally do not think of my own benefits when I coach. The sparkle in a student's eyes, the text message from a client who got a promotion, or the improved deliverable from a subordinate are rewards. But there is a learning process involved—I learn as much as I coach. – *Tathagata Dasgupta, Ph.D., adjunct faculty, operations and decision technologies, Paul Merage School of Business, University of California–Irvine*

Worksheet 1.3 is an exercise to help you determine the benefits *you* will reap from coaching. The worksheet presents a list of many possible—and real—benefits of coaching. It's important to

know what drives you to coach your employees so that when the going gets tough, when you just can't imagine how you'll fit coaching into your already busy day, you can refer to the list of motivations and benefits you find most compelling. There are no wrong answers to the exercise. It's simply your personal reminder of why you want to coach.

Now that you know why you personally want to increase your coaching repertoire, you'll find tool 1.1 interesting. It presents some of the benefits that more generally are ascribed to coaching for the organization, the coach, and the person being coached.

Arguments for the power of workplace coaching are increasing in proportion to its increased incidence. This is no surprise,

# WORKSHEET 1.3

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## Why Should I Coach?

**Instructions:** In this exercise, you'll distribute 200 points among your top motivations for integrating coaching skills into your management competencies. First, select your four top reasons and place a checkmark to the left of each one. Then give each of those four reasons one of the following point values: 100, 50, 25, and 25. Assigning points thoughtfully prioritizes your coaching motivations and reveals what benefits you expect to realize from the endeavor.

Motivation/Benefit	Points
♦ Incorporating coaching is an opportunity to advance my own career.	
♦ I can use my strong skills to help others grow.	
♦ I have a passion for learning.	
♦ I can give people skills that can help them.	
♦ I will become a better communicator.	
♦ I will become a better partner, parent, family member, or friend.	
♦ Coaching will promote a more productive workplace.	
♦ I'd like to become a coach on my own some day.	
♦ It's just the way to be with people.	
♦ I will become more efficient in my own work practices.	
♦ I will get better results from my staff.	
♦ I will be a better leader.	
♦ I want to help an employee who needs her rough edges refined.	
♦ If I integrate coaching skills, our team will get along better.	
♦ Coaching is part of my job description.	
♦ I want to further my own learning and growth.	
♦ I want to become more open to feelings—mine and others'.	
♦ I want to be available to others; everyone needs someone to talk to.	
♦ I want to improve the world.	
♦ I want to give to others.	
♦ Other [add your own motivation/expected benefit]:	

# TOOL 1.1

## Coaching Benefits

Benefits to the organization	Benefits to managers/coaches	Benefits to employees
<ul style="list-style-type: none"> <li>◆ Cost-effective development occurs on the job and is customized for each employee.</li> <li>◆ Responsibility for developing employees is decentralized.</li> <li>◆ Manager–employee relationships are strengthened.</li> <li>◆ Productivity increases.</li> <li>◆ When employees explore their interests and skills, a good fit between them and their work is ensured.</li> <li>◆ High-potential employees are less likely to leave organizations that invest resources to help them meet their needs and interests.</li> </ul>	<ul style="list-style-type: none"> <li>◆ They develop skills and receive tools to coach employees.</li> <li>◆ Using coaching skills enhances all of their working relationships.</li> <li>◆ Their teams become more cohesive and productive.</li> <li>◆ They feel a sense of accomplishment as they reach their own goals; their performance often improves.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Increased motivation and productivity result from personal attention.</li> <li>◆ They receive individualized and confidential advice on issues affecting their careers.</li> <li>◆ Morale and job satisfaction increase as they experience the fulfillment coming from doing work that honors their values.</li> <li>◆ Confidence increases.</li> <li>◆ The discovery that real choices are available to them is empowering.</li> </ul>

knowing what we know about the most effective strategies for maximizing learning. Research by the Center for Creative Leadership has shown that these are the best options for growth:

- ◆ experience-based options (such as job rotations, temporary assignments, or project management)—70 percent effective
- ◆ feedback- and relationship-based options (including personality-based profiles, mentoring, or buddy systems)—20 percent effective
- ◆ education-based options (such as workshops, training courses, or degree programs)—10 percent effective.

Coaching is more than just a feedback- and relationship-based option. Because it encourages coachees to experience new ways of doing things and to take on projects and challenges, it derives benefits from experience-based options; because it often results in coachees enrolling in workshops or getting additional education, it also garners the benefit an education-based option provides.

## POINTER

**Coach Training**

This book will make you more coach-like in your day-to-day interactions. Enrolling in a coach training program will turn you into a bona fide coach. This doesn't necessarily mean that you need to earn your income as a full-time coach (although it often leads to that), but that you'd add value to whatever job you hold as a credentialed coach.

Some of the more well-known coach training programs are Coach Inc., Coach U, Coaches Training Institute (CTI), the Institute for Life Coach Training (ILCT), iPEC Coaching, MentorCoach, New Ventures West Integral Coach Training, and Results Coaching Systems. There are hundreds more. ASTD also offers a two-way Coaching Certificate Program that focuses on workplace learning and performance coaching.

If you decide you want to become a credentialed coach, how do you choose which program to attend? First, make sure the program you're considering is accredited by the International Coach Federation (ICF). Most weekend or three- to six-day coaching programs aren't accredited and, like this book, can only give you some good coaching tools and some ideas. Each of the ICF-accredited programs is described in some detail on the ICF website, under the heading "Coach Training," then "For Prospective Students."

Next, look at the programs' materials—primarily their websites or any published texts. Do they speak to you? Do you agree with their general philosophy and approach? Some programs are more academic in nature, some more contextual. Some programs take a business approach to starting your own coaching practice. Many concentrate on a specific type of coaching, like relationship coaching, corporate coaching, or group coaching.

If the program you're considering offers a free teleclass to introduce you to its curriculum (and many do), sign up for it. Speak to graduates with backgrounds similar to yours to see how they're using what they learned. These programs' administrative staff and counselors are trained to help you make this decision.

Finally, of course, you'll have to factor in your logistical needs. Programs vary greatly in their cost, location, schedule, class size, and flexibility.

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Coaching is more than just a buzzword in today's complex work world. Executed with care, coaching is an intimate, significant relationship that truly will affect two people deeply and produce measurable results for organizations.

## Applying the Learning

- ◆ How do you define coaching?
- ◆ How are your coaching skills? Review your ratings on worksheet 1.1. This week, try to implement the item that will propel you toward excellence (identified in worksheet 1.2).
- ◆ What is drawing you to coaching? Review the point totals you assigned to the coaching motivations and benefits in worksheet 1.3. This will help ensure that you always know why you're taking the time and energy to do this.



NOTES

