

COACHING & MENTORING ADVICE

During ongoing coaching/mentoring sessions, you and your direct report meet to discuss job performance or needed skills in more detail. Prepare for each session by agreeing on the desired outcome of the meeting and the topics you both wish to cover. During the sessions, remember that coaching is a partnership and requires a positive emotional bond. Cultivate that bond by:

- Keeping the tone positive
- Focusing on the opportunity for personal development
- Demonstrating your sincerity in wanting to help
- Sharing your advice, suggestions, and observations, and listening to the other person's responses and ideas
- Strengthening agreement on desired outcomes
- Gaining the coach's agreement to create an action plan
- Setting up a follow-up date to review progress

Steps for coaching/mentoring

1. **Prepare.** Observe your potential coach, test your hypotheses about his or her skills or performance, estimate the probability of improvement, and ask the employee to prepare for coaching.
2. **Discuss skills and performance.** Share your observations with the potential coach, ask questions and listen actively to his or her responses, and explore potential causes of the performance problem or the need for new skills.
3. **Coach.** Obtain agreement on goals, conduct coaching sessions, customize your approach, blend inquiry and advocacy, give feedback, and create action plans.
4. **Follow up.** In this final step of coaching, you regularly discuss what's working well and what isn't, and make any needed adjustments in the goals or the coaching process.

Tips for effective coaching/mentoring

- Create an atmosphere of trust. Trust makes coaching possible, and the act of coaching strengthens trust.
- Keep the coaching focused to one or two goals that will help the employee improve performance or close a skill gap.
- Cultivate a comfortable setting during coaching sessions. Make sure you will not be interrupted. Set a positive tone, and communicate genuine support for the person's development.
- Establish ground rules up front. For example, what is said during a coaching session will remain confidential, and each party will agree to fulfill his or her commitments to the coaching process.
- Establish preferred work styles and a method of feedback up front. For instance, some people like to receive feedback in written form so they can process it at their own pace and refer to it during the coaching process. Others prefer to receive feedback in spoken form.
- Set mini-milestones to help your coach build confidence and stay motivated.
- Be clear about who has promised what during the coaching process. To maintain accountability, periodically assess whether both parties have fulfilled their agreements and commitments.
- For large goals, such as acquiring a new skill, invite your coach to create an action plan that lays out the coaching need, the goal, the steps the coach will take to achieve the goal, ways of

reviewing progress, and the role that the coach will play (for example, attending meetings to observe the coachee's behavior).

Tips for cultivating a spirit of partnership

- During coaching conversations or sessions, set your direct report at ease. Don't let the person feel that he or she is being scrutinized.
- Ask the employee, "How do you think we are doing as a unit?" You'll convey the important message that everyone has a part to play in the coaching process.
- Review the purpose of the coaching process and its positive benefits for both parties. This will psychologically prepare you and the employee for the process. It will also act as a "warm-up" for useful dialogue.
- Do whatever you can to avoid interruptions by phone calls and other intrusions. Taking a phone call during a coaching discussion sends the employee a nonverbal signal that the call has a higher priority, which is exactly the *wrong* signal.

Customize your coaching approach

There are two coaching approaches—**directive** (showing or telling the other person what to do) and **supportive** (acting as a facilitator or a guide). The table below suggests uses for each approach and provides examples.

Once you've had an initial conversation with your coach, you might change approaches depending on your coach's issues and needs. But whichever approach you're using predominantly, reassure the person that discussing mistakes or shortcomings with you during coaching will not be reflected negatively in his or her performance review. You'll build a strong foundation of trust, which is essential for successful coaching.

Directive versus Supportive Approaches		
Approach	Uses	Example
Directive	Developing skills	Training a new employee who needs to develop skills in your area of expertise
	Providing answers	Explaining the company's strategy to a new direct report
	Instructing	Conducting a sales call with an employee to demonstrate how it's done
Supportive	Facilitating problem solving	Helping a direct report find his or her own solution to a problem
	Building confidence	Expressing belief that an employee can find the solution
	Encouraging self-directed learning	Letting a direct report with new responsibilities learn on the job and make mistakes
	Serving as a resource	Providing information or contacts to help an individual solve problems

Blend inquiry and advocacy

While coaching, you rely extensively on **inquiry**, or asking questions. But an over-reliance on inquiry can make coaches feel like they're being interrogated. As a result, they may withhold important information and their viewpoints. For that reason, incorporate **advocacy**—offering your ideas and advice.

The best coaches advocate in such a way that their coaches can hear their ideas, respond to them, and consider their value. To advocate effectively:

- Present an idea in neutral terms.
- State your opinion—your interpretation of what you have observed.
- Make the thoughts behind your ideas and advice explicit.
- Share your own experiences if they might help.
- Encourage the other person to provide his or her perspective.

Here's an example: "Joe, I'd like you to consider taking that workshop on public speaking. I think it could help you work toward your goal of delivering compelling presentations to the sales force. When I started out, I found this training very helpful. I'm wondering what you think of giving the workshop a try."

Steps for balancing inquiry and advocacy

1. Describe the individual's situation in a neutral way based on your observations.

To balance inquiry (asking questions) with advocacy (presenting your ideas or opinions) during the coaching session, start by referring to the observations you gathered during the preparation stage of coaching.

For example, "Martin, thank you for generating so many reports for the executive committee over these last few months. You really accomplished a lot under extreme time pressure. I think your reports could be much more useful to the committee, though, if you learn how to format them in a more effective way. I've noticed that the five reports you created lack an executive summary, as well as headings to indicate the flow of information."

2. State your opinion—your interpretation of what you have observed.

After presenting your observations, offer your views of what you've observed.

For instance, "Martin, when reports lack certain features, such as a summary and headings, executives find it harder to read and absorb the information."

3. Make the thoughts behind your opinion explicit.

Explain what assumptions or line of reasoning led to your opinion:

"Martin, most of the executives on the committee are eager to get through the material as quickly and efficiently as possible. That's why I'm thinking it would be good for you to learn how to format your reports in ways that make the reading easier for your audience."

4. **Share your own experiences if they might help.**

Sometimes describing your own experiences can help explain the reasoning behind your opinion or idea.

For example, "Martin, I've discovered that when technical reports begin with a summary and contain headings throughout, it takes me about half the time to read them as it does to get through unformatted reports."

5. **Encourage the other person to provide his or her perspective.**

To balance advocacy with inquiry, ask questions that invite your coach to provide his or her perspective:

"Martin, do you agree that it's important for you to learn how to write more effective reports? If so, what steps do you think we need to take to help you achieve this goal? How would you like to measure your progress?"