Center for Executive Coaching

Situational Coaching

Quick Tips and Instant Coaching Questions Reference Guide

(**Note:** See the Center for Executive Coaching's Coaching Toolkits for more in-depth guidance)

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CONTRACTING WITH THE CLIENT

> What is your goal for the coaching engagement that will justify the time and expense?

> What are the fees?

> What are the payment terms?

> How often will we meet?

> How do we define results and track progress?

> Which assessments do we do?

> How do we define "done"?

> What is confidential and what isn't?

> What conversations are not in scope?

> How do we report progress, to whom, and when?

> What is the reschedule policy if you have to cancel a session?

> What are the coach's responsibilities?

ACTIVE INQUIRY

Brief overview:

1. Set a clear goal for the session.

2. Quickly describe the process.

3. Jump into active inquiry.
   a. Focus on questions that move the conversation forward.
   b. Let the client guide the process. Ask where they want to go. Give them choices.
   c. Higher-level, simple questions are better.
   d. Use open-ended questions where possible.
   e. Avoid hidden suggestions.
   f. One question at a time, please.
   g. Look for voltage.
   h. Use silence to let the client finish.
   i. Reflect back what you heard from time to time.

4. Close out by asking:
   a. What insight(s) did you have?
   b. What will you do to be accountable for the insight(s) you had?
   c. Where should we start next time?
   d. What did you find most valuable?
   e. If you have an insight you can share it, but make sure you let the client tell you if they want to discuss it or go where they want to go.

Illustrative Questions:

› What would a successful resolution of this problem look like?

› What are your ideas to get there?

› If fear/budget/bureaucracy/time were not an issue, what would you do to make this work?

› What can you do to get some quick momentum here?

› If you had to give yourself advice in this situation, what would it be?

› Who has been/is being successful on this issue, and what did they do/are they doing that you can apply here?

› What do you have working for you that you can build on?

› Who supports you that you can leverage?

› What resources can you utilize to help you?

› Where can you go for support/knowledge/information/advice/political cover?

› How willing are you to be flexible?

› What's one behavior you can start/stop/do more/do less to have an impact here?

› What's in your control that can make a difference here?

› Who do you need to influence?

› What are you tolerating that you can stop tolerating?

› What's one thing that is possible here?

› What is one assumption you are making that you could stop making in order to move forward?

› Think of the best leader you know. What would he or she do in this situation?

› If you were sitting in my seat, what question would you want me to ask you right now?

› Let me make sure I heard you right… What am I not hearing right?

Plus: Don't underestimate the power of silence as a great question.

Key: If you listen well enough, the client will tell you what to say next.

REVIEWING AN OFF-THE-SHELF ASSESSMENT

> What stood out for you about this assessment?

> Which trait/style would you like to discuss first?

> For any trait/style:
> > What are situations where you can you use or build on this trait as a strength?
> > What are situations where this trait might present a challenge for you?
> > How can you use this trait to be an even better leader in your role?
> > What other traits might you combine with this one to be even better?
> > How might you have to adapt to people who have a different profile/trait?
> > Who do you work with that is the best fit with this trait?
> > Who do you work with that has a trait/style that represents the biggest challenge for you, and how can you handle this challenge effectively?
> > What else do you want to talk about in regards to this trait/style?

> Overall what is your top insight or insights to take away from this discussion to be even better? (Or, if you had to pick one thing from our discussion to be even better as a leader, what would it be?)

> How does this assessment tie to the other assessments we have reviewed?

> How does this assessment relate to the goals of our coaching engagement together?

> How can we build your takeaways from this assessment into our coaching plan?

> What did you find most valuable from this?

360-DEGREE VERBAL ASSESSMENT

1. **Set it up with client.**
   a. Will be confidential.
   b. Select 10-15 people up, down and across the organization; get a diverse selection regardless of quality of relationship.
   c. Ask the client how he would answer the three questions.
   d. Client schedules the meetings. 20 minutes is about right. Provide blocks of time and usually client has a connected calendar for easy scheduling.
   e. If needed, provide a memo template that goes something like this: "As you might know, I am working with an executive coach. His name is X. X will be interviewing you over the next week or two to get your advice about how I can be a better leader and manager. The interviews will take about 20 minutes.

   He will be asking three main questions, noted below. Please give some thought to these questions prior to your meeting. Everything you say will be held in the strictest confidence, unless you say otherwise. X is going to report back to me trends, not specific quotes or anything that can identify you.

   The three questions X will ask are: 1). What are up to three things I do well? 2). What is the one thing I can do better that would have the biggest impact on my performance as a leader? 3). What other advice do you have for me to help me improve?

   I really appreciate your candor and support during this process. Please contact me with any questions you might have."

2. Conduct the interviews, reminding participants that everything they say is confidential, unless they tell you otherwise.

3. Look for trends. Try to home in on the one thing that will have the biggest impact on your client's performance.

4. When synthesizing results, I suggest you avoid providing a written report to avoid any misinterpretation by people who might see the report.

5. Here is a suggested format for providing feedback. This format is based on trying many different approaches. The trick is to build on the client's strengths, and show the client how he can build on these strengths and achieve his primary goal(s) by working on one important, constructive thing:

Here are 3 things that people said you did really well:

1.	
2.	
3.	

In addition, based on what people said, I think you have an opportunity to build on those strengths, and achieve your overall goal of _____ if you _____
[one behavior stated constructively/positively, as in *"praise people publicly more often"; "let people finish and show that you have heard and considered what they said"*).

[After the client absorbs above...]

In addition, one or two other opportunities might be to

_____ . [Get his thoughts]

And

_____. [Get his thoughts]

LEADER'S DASHBOARD

1. See the toolkit, which covers Vision, Mission, Values, Edge, Top Initiatives, Top Performance Metrics, Key Relationships, and Key Development Opportunities.

2. Give to client to complete prior to first meeting.

3. Refine during meeting.

   a. Which area or areas were clearest/easiest for you to complete?

   b. Which were most challenging?

   c. On which area would you like to focus to get the most value?

   d. How would you like to review your Leader's Dashboard together with me?

   e. What did you find most insightful from doing this exercise?

   f. How can you use this tool to improve your leadership [or specific area where they want to get better]?

   g. How does this relate to your 360-degree assessment/off-the-shelf-assessment?

   h. How would you like to use this tool going forward?

   i. What else you like to discuss about this tool?

4. Finalize and ask client how often they would like to update/review it with you.

QUICK DEVELOPMENT PLAN

Employee Name →	

Goals	Near Term	Longer Term
Results, performance, and achievements		
Initiatives started/completed		
Attitudes/behaviors demonstrated		
Skills learned		
Knowledge gained		
What the Employee Will Do to Achieve Above	**Description**	**By When?**
New Assignments and challenges		
Meet key people, develop mentors, form new relationships		
Get feedback and advice		
Attend formal training programs/conferences		
Join new organizations/networks		
Read and conduct self-study		
Coaching		
Other		

INSTANT CAREER PLAN: INQUIRY

> What's the one area where you will spike?
>> **Alternative:** What are a couple of areas where you will do well and that, taken together, allow you to excel compared to others?

> What's the specific, measurable value you bring to others?

> What's your vision of what you want to achieve in your career?

> What are your top three to five values that guide your career?

> What are the top three to five most advantageous next steps in your career?

> What are the top one to three assignments, projects, or achievements you need in order to develop your expertise and track record?

> What are the top one to three key skills or areas of knowledge you need to acquire?

> Who are the top five mentors, industry leaders, functional experts, and other key people your need to know, and who you don't know now?

> What is any specific training or formal education that will help you achieve your career vision?

> What other actions will help you achieve your career goals, vision, and next steps?

> What are the best next steps to get traction in your career?

INSTANT CAREER PLAN: THE PLAN

Date ➜	

The area of expertise where I will excel or **"spike"**

The specific, measurable value I bring to others

My vision of what I want to achieve in my career

The top three to five values that guide my career

The one to three most advantageous possible next steps in my career

	What (or Who)	**By When**
The top one to three assignments, projects, or achievements I need in order to develop expertise and my track record		
The top one to three key skills or knowledge I need to acquire		
The top five mentors, industry leaders, functional experts, and other key people I need to know and who I don't know now		
Any specific formal education and training that will help me achieve my career vision		
Other action steps that will help me achieve my career goals, vision, and next steps		
Top 3 immediate next steps		

BEHAVIORAL COACHING

1. What is one specific behavior, framed positively, that you can start doing to have maximum impact on your performance?

2. How can you make it a habit?

> Take notes.
>> What patterns do you notice?
>> How can you pre-plan to be more effective and create new habits?

> Use the feedback process to be accountable, track progress, and get ongoing advice.
>> Goal: three consecutive months with a score of 4.5 or higher.
>> Coach the client as needed on receiving feedback constructively.
>> Add additional tactics one by one as needed to support the client's success and the AAA framework (Awareness-Aversion-Alternative):
>> - Notice triggers and cues and make new choices
>> - Notice unhelpful thoughts and think differently
>> - Use choice as a tool/choose to choose
>> - Pre-plan alternative, more effective behavior (especially based on notes)
>> - Set up pattern interrupters
>> - Conduct small experiments
>> - Write a new story or script
>> - Focus on Vision/Why
>> - Use Rewards
>> - De-stress
>> - Go to One's Support network
>> - Set boundaries
>> - Use Self-talk/Self-coaching
>> - Create emotional anchors
>> - Use affirmations and written reminders
>> - Build on lessons from past successes
>> - Create a back-up plan/emergency message to self

PERCEPTUAL COACHING TO REFRAME LIMITING BELIEFS/CREATE THE STATE

CATEGORY	Reframing Strategies
False assumptions ❯ Prophesying about the future. ❯ Tyranny of either/or thinking. ❯ All or nothing thinking. ❯ Awful-izing. ❯ Myopic thinking. ❯ Mind reading ❯ Stuck in the past thinking. ❯ Dreaming without doing. ❯ The ladder of inference.	**Ask for logic and specifics.** Separate facts from how they perceive the facts. **For Tyranny of the "or":** How can you do both? **Challenge aspirations and work ethic:** Either they give up on or reduce aspiration or increase work ethic.
Classic limiting beliefs ❯ I can't trust other people. ❯ Everything has to be perfect. ❯ I need perfect information. ❯ I need to be in control. ❯ I am not good enough/not worthy. ❯ I can't show vulnerability. ❯ I need to be the hero. ❯ Conflict is bad. ❯ I need to be liked/loved/popular.	**If I do A, B, and C, then D is likely to happen.** (Take small steps to get a good outcome). **Creative reframing** (It is not about X it is about Y). **Metaphor** (Success in a different role or from a different life).
False Priority I would rather be X than successful **X =** 　❯ Right 　❯ Smart 　❯ Look good 　❯ Safe 　❯ Avoid conflict 　❯ Popular/Liked	**If I do A, B, and C, then I will get X** (Reframe so that if they do the correct things, then X will come to them. Right now, they are doing things backwards, looking for X before doing the right things). **Or: How can you both be successful AND be seen as X**
Cultivate a Belief/Create the State	Challenge the client to cultivate a new attitude, e.g. It's possible; I care; I can; Yes, and; or It's about curiosity and learning...

COACHING TO THINK COMPREHENSIVELY

1. **Tools to consider for further study:**
   > Pareto
   > Logic Tree/Hypothesis-based problem solving
   > Fishbone
   > Monte Carlo
   > Systems Thinking
   > SWOT
   > Expected value and risk management
   > Force field analysis
   > Ben Franklin analysis
   > Brainstorming techniques

2. **Illustrative coaching questions to help a client think comprehensively about an issue:**
   > Let's explore different perspectives:
   > What would each stakeholder say about this issue?
   > What advice would you give to a colleague about this issue?
   > Who is the expert in this issue? What would they advise?
   > What would the following say about this issue:
     • Finance expert/investor (investments, costs, cash flow, time to see a profit, return on investment, time for payback on investment, how big it can get, ability to execute)?
     • Strategic expert?
     • Operations expert?
     • Chess master (thinking about all the moves)?
     • Risk manager (thinking about what can go wrong, the probability of those risks, the impact, and how to avoid and/or mitigate each risk)?
     • Market researcher?
     • Talent scout (who we need on our team to succeed)?
     • Politician (how to navigate the political risks of the idea)?
     • Leverage builder (how to get leverage on the client's time and money)?
     • Improvisational actor (how to be resourceful and agile)?
     • Networker (what relationships are critical to success and how can you build/nurture/strengthen them)?
     • Persuader (who to influence)?

- Drill Sergeant (how to make things happen)?
- A Devil's Advocate?
- Someone with lots of empathy?
- An ethicist?

› What are the pros and cons of the idea?

› What are all the variables and issues to consider in order to evaluate the system as a whole?

› Where might you be too optimistic? Too pessimistic?

› What is the next best alternative and how does that compare to this?

› What assumptions might you be making that we should check?

- What if you changed/didn't make that assumption?

› Where might you be confusing facts with opinions, judgments, or interpretations?

› Where might you be climbing the "ladder of inference?"

› What judgments are you making about others that might be an issue? How can you shift your perceptions to create a more favorable outcome?

› How is your ego interfering?

› Where might the "not invented here" syndrome be an issue?

› How can you do a test before rolling everything out with maximum risk?

› What is the MVP (minimally viable product) to develop before rolling out a perfect solution?

› Where might you be stuck in what happened in the past?

› Where might you be predicting the future based on feelings, prophesy, and unrealistic assumptions?

› Where might you be suffering from confirmation bias (fitting the facts into what you already believe, even if they don't fit)?

› What do you do well that you can apply to this situation?

› What have you done in the past, successfully, that is similar to this situation and you can apply here?

› What mini-steps can you take to get momentum?

› What if you didn't do anything?

› Where might you be reading other people's minds instead of having a conversation with them to find out their ideas and opinions?

› How can you think even bigger about this?

› How many possibilities and alternatives can you imagine in this situation?

› What forces and counter forces are at play here that will change the dynamics over time?

› How can you create a system that enables success?

› Where might you be using any of the following to make incorrect conclusions:

- Anecdotal evidence?

- Confusing coincidence with causality?
- Confusing analogies with data?
- Going with how something feels vs. confirming with data and facts?

> Where might you be obfuscating with jargon or buzzwords instead of simple, clear language

> What are predictions you are making that seem too good to be true, for instance a straight line of growth?

POWERBASE COACHING

Improve the current powerbase:

> Identify your current powerbase.

> Assess the quality of each relationship.
>> Sponsor/mentor
>> Supporter
>> Neutral/On the fence
>> Antagonist
>> Foil/Nemesis
>> Client is not on radar screen

> What is your vision of how the relationship should look?

> How will you know when the relationship is as strong as it could be?

> What are the other person's personal and professional motivations?

> Brainstorm about how the client can bring value to them and vice versa.

> What immediate ideas emerge about how to improve the relationship?

> What others ideas emerge based on:
>> How to help the other person succeed/get what they really want (credit, status)?
>> How to adapt to the other person's communication style?
>> How to have a better attitude when interacting with the other person?
>> How to improve your performance?
>> How to have the right amount of contact?
>> How to interact using the best media for the other person?
>> How to make amends for any past issues or conflicts?

> What are specific next steps to improve this relationship?

> How often will you make a plan to assess and improve this relationship?

Develop the "from the future powerbase":

> What is your best vision for your career?

> Who would know you who doesn't know you now?

> For each person, tell the story of how you got to know each other, in the present tense.

> Tell a few versions, to break out of any pre-existing limitations of how you meet people today.

> What are the implications for how you have to start showing up differently?
>> New places to join/hang out?
>> New attitudes and behaviors?
>> New body language?
>> New appearance?
>> New perceptions?
>> Things to stop doing?
>> People to stop hanging out with?

MANAGE UP I: DIRECT MANAGER

› What insights can you have about improving your relationship with your manager based on understanding him or her better:

  › How he defines success in his or her role?
  › Most important performance goals and initiatives?
  › Career aspirations?
  › Personal aspirations?
  › Thinking style?
  › Communication style?
  › Values?
  › Attitudes or behaviors from others that are sure to upset him or her?
  › What else?

› Assess the current relationship with your manager:

  › How well are you meeting expectations for performance?
  › How well would your manager say you are communicating progress, issues and results?
  › How much does your manager trust you?
  › How would you rate the current relationship: mentor, supporter, neutral, negative, strongly negative?

› What are ways to strengthen the relationship?

  › How willing are you to strengthen the relationship?
  › What conversations might you need to have with your manager to discover how you are performing or make requests?
  › How can you help your manager be more successful, look better, and not look bad in the organization?
  › How can you help your manager have more time? Fewer hassles?
  › How can you communicate more effectively with your manager?
  › What's the appropriate frequency to meet with your manager?
  › How can you better adapt your style to your manager's style?
  › What past issues might you have to clear up?
  › What else?

› What's the action plan?

MANAGE UP II: OVERALL LEADERSHIP

> How would you assess your overall relationship to leadership in your organization, in general?

>> How do you want your relationship(s) to be?

>> What are ideas to fill in any gaps?

>> What can you apply from third-party assessments you have taken about how you can relate more effectively to authority (e.g., accommodation, manageability, independence, sociability, and other traits)?

>> What assumptions or biases might you be making about your leadership team/managers that might weaken your relationship with them? How can you reframe them to create new opportunities?

>> What else is important to consider?

> List each leader in your organization where the relationship matters:

>> How would you assess the relationship?

>> What is your goal for the quality of the relationship, and how will you know it has been achieved?

>> What is important to the leader – professionally and personally?

>> What are your ideas to show value to him or her?

>> Who can help you develop the relationship?

>> How will you adapt to his or her communication style?

>> What is your plan to strengthen the relationship?

>> What are things to avoid doing?

>> What else?

>> What's the action plan?

IMPROVE COLLABORATION ACROSS THE ORGANIZATION

› How can you improve your overall collaboration?

 › What beliefs do you have that help your ability to build successful relationships across the organization?

 › What beliefs do you have that might hinder your ability to build successful relationships across the organization?

 › What are you doing well that you can build on in terms of collaborating across the organization?

 › What can you do better? With whom specifically?

 › What behaviors can you start, stop, do more, or do less to be a better collaborator (e.g., giving and receiving constructive feedback)?

 › What is one new attitude, behavior, or action you can make a habit to be better at collaborating?

› Assess each key colleague and unit with which you have to collaborate for your success and the success of the organization.

 › How is the quality of the relationship now?

 › How can it be better?

 › What's important to the other person in this relationship?

 › What feedback from the other person would be useful to have?

 › Who can help you to influence the other person, if appropriate?

 › What are your ideas to improve collaboration?

 › What are you willing to give up, start doing, stop doing, do more, or do less in order to improve the relationship?

 › Where can you be more flexible?

PERSONAL BRAND COACHING

> What brand would you want to have in an ideal world?

> How does your current brand rate on uniqueness, consistency, being memorable, value, and trustworthiness?

> What do at least five other people say about your brand (challenge your client to do the assessment in the toolkit, and have them guess first)?
>> How does your perceived brand compare to the brand you want to have?
>> What do have to do to get to your ideal brand?

> Compare your current and ideal brands in terms of:
>> What are your top talents?
>> What are your non-negotiable values?
>> What is your mission/purpose statement and how can this give value to your brand?
>> What is your value proposition?
>> What is unique about you, and therefore your brand?
>> What is at least one "Walk on Water" story you can tell to show people that you and your brand really does stand out?
>> What can you improve in how you show up so that you and your brand have a lasting, positive impression?
>> - Effective and positive attributes you already have and can build on?
>> - New attributes you will develop?
>> What proof can you offer to back up the promise of your brand (e.g., testimonials, case studies, awards, credentials)?
>> What else?
>> Given any differences between your current and ideal brand, what action steps do you have to take to develop new behaviors, skills, experiences, or achievements?

> What messaging can you use to convey the value of your brand right now:
>> Hook?
>> - I help **X** to get **Y**
>> - I am an expert at A, which bring this value to people….
>> The problem you solve, the benefits you/your solution brings, why you are unique, proof, and (if appropriate) a call to action

> How can you better create an image that goes with your brand?

> What is your plan to improve your brand short term, mid-term, and long-term?

TEAM COACHING

Start with active inquiry to understand the client's issue(s) first, before jumping into any kind of toolkit or framework. Team is a huge subject area! From there, areas of inquiry might include:

> What's working?

> What do you want to improve?

> Where is the team moving forward?

> Where is the team stuck?

> Where would you like coaching on the team?

> If I were to interview each team member about their views of the team, what would I hear?

> What would they tell me were the top three problems the team needed to address to be more effective?

> From there, coaching could be about any number of issues:
>> The goal of the team and team alignment about the goal.
>> Setting initial ground rules or rules of the road for the team.
>> Recruiting team members.
>> Clear roles and responsibilities.
>> Setting expectations and holding team members accountable.
>> The leader's own performance and comfort engaging team members.
>> Resolving team conflicts.
>> Trust among team members.
>> Getting momentum and early wins.
>> Preparing for risks.
>> Improving team communication.
>> Transitioning team members in and out.
>> Setting the right tone on the team.
>> Have a mid-course meeting to regain momentum.

TEAMS – USING ASSESSMENT

> What blindspots might exist for the team that could get it into trouble?

> What strengths does the team have that can help it succeed?

> How do the team's vision, mission, and strategy complement or contradict the occupational interests, behavioral traits, and/or thinking styles of the team?

> Where might some team members feel left out?

> How can the team leader and members make sure everyone feels included?

> What challenges does the team leader have in working with this team, and vice versa?

> Where will some team members have to adapt their communication style?

> Where will some team members have to adapt their expectations for:
>> Juggling lots of projects at once?
>> Getting lots of things done quickly?
>> Being social?
>> Small talk?
>> Analyzing data in depth?
>> Making quick decisions?
>> Questioning or following rules?
>> Working independently?
>> Getting to the point?
>> Asserting too much or too little?
>> What else?

TEAMS – ONE-DAY RETREAT

› Combine the team's/client's business objective(s) for the meeting with work to help the team improve how it works together

› Conduct some assessments/interviews ahead of time

> **Team ProfileXT**

> Interview team members about the team. Do a 360-verbal assessment as if the team were the client: What are up to 3 things going well with the team? What is the one thing that the team could do better that would have maximum impact on team performance? What other advice do you have for the team? You can also ask about the top issues the team has to resolve to be successful.

> You could also create an ad hoc assessment in which team members rate themselves on specific criteria and then rate the team as a whole on the same criteria. This will tell you how individuals perceive themselves vs. the team as a whole to get a sense of overall awareness and who is and isn't pulling their weight.

› Synthesize an agenda that moves the team's business agenda forward and leaves time to discuss:

> **ProfileXT results**

> Top concerns of the team

> Opportunity to give individual feedback and make new commitments

> Opportunity to discuss any new distinction relative to where the team might be in its life cycle (e.g., setting ground rules, anticipating risks, resolving conflicts and making amends, final push to the finish line, celebrating results, adding new members...)

› During the meeting you can create opportunities for people to give feedback confidentially.

> **Notecard exercise #1:** Each person writes down their top 3 concerns about the team on a notecard. You read these while a facilitator writes concerns on a whiteboard/flip chart. The team discusses the top concerns and how to resolve them.

> **Notecard exercise #2:** Each person has one notecard for each person on the team, with a specific person's name on the card. On the front they write up to three things the appreciate that that person's contribution. On the back they write only one request that would help the person be an even better team member. Each person then receives their cards, reviews them, and stands up to make new commitments to the group based on the feedback they received.

TIME MANAGEMENT/OVERWHELM COACHING

> Start with a time study to get data. Ideal: 15 minute increments for at least a week.

> What do you notice about how you use your time now?
>> What should you keep doing?
>> What is not strategic for your role?
>> What can you delegate to someone else?
>> What are time wasters that you don't have to do at all?
>> What do you do too well – to the point that you waste time overdoing it?
>> What uses of your time do not fit with your values?
>> What do you not have to do right now?
>> What can you do more efficiently?

> How would you construct your ideal day/week?

> What are your top strategies to get there?
>> Leader's Dashboard to get more focused on what really matters?
>> Setting boundaries?
>> Delegating?
>> New beliefs/perceptions?
>> New behaviors?
>> Things to stop doing?
>> Things to start doing?
>> Improved processes?
>> New technologies?
>> People who can support you?
>> Interruptions to stop?
>> Interruptions that aren't interruptions, to start budgeting?
>> Stress reduction to get more time?

> What's the action plan?

INFLUENCE CONVERSATIONS COACHING

> What's the goal?

> What will motivate the other person in this situation?

> What is the best approach to influence the other person?
>> Facts, logic, reasons that matter to the other person?
>> Asserting/setting boundaries?
>> Negotiating?
>> Listening/open-ended questions/collaborating?
>> Common ground/social capital?
>> Sharing vision/painting picture with words of compelling future?

> What is your plan?
>> Opening?
>> Planning for objections?

> What can go wrong, and how will you be prepared?

> Role play.

INFLUENCE CAMPAIGN COACHING

> Who are the key people involved?

> Build a table
>> What is each person's power score on scale of 1, 2 or 3?
>> What is each person's opinion score on scale of -3, -2, -1, 1, 2, 3?
>> Multiply each score for each person

> Graph each person. Size box by power score. Color box red or green by negative or positive score.

> What do you notice when you see the politics of the idea graphed out?
>> Do you have enough people already on your side?
>> What will it take to get enough people on your side?
>> Or is this battle not worth fighting at this point in time?

RESOLVE A CONFLICT COACHING

> What would it look like if the conflict were resolved?

> How willing are you to resolve the conflict?

> What are you willing to give up in order to resolve the conflict?

> How much responsibility are you willing to take for the conflict?

> What is the other person's position about the conflict?
>> What would they say is the root cause of the conflict?
>> What do they want in order to resolve the conflict?
>> What type of influence approach might work for them to resolve the conflict?

> What is the other person's overall world like to them, and how might this help uncover insights to resolve the conflict?
>> Aspirations?
>> Motivations?
>> Style?
>> Orientations?

> What are your needs and wants in this situation?
>> Where are you willing to be flexible?
>> Where are you not willing to be flexible?

> Where do you and the other person share common ground?
>> What are similarities and differences in your communication styles and relationships to conflict, and how can you use this information to help in this situation?

> What is the best strategy or approach to communicate with the other person and attempt to resolve the conflict?
>> What objections will the other person raise and how will you address them?
>> Where will you hold the meeting?
>> What can go wrong and how can you be ready?
>> What else do you need to prepare for?

> How can you role play to prepare?

When a leader has conflict as a systematic problem:

> What are you tolerating on your team that allows these conflicts to continue?

> What are your ideas to end these conflicts?

> Who are the key people responsible for the conflicts? What expectations do you need to set with them?

> What else do you need to do to end these conflicts?

RESOLVE TEAM/ORGANIZATIONAL CONFLICT

> What is in your control as a leader?
>> Describe the state you want to see, when the conflict(s) is/are resolved?
>> What are your ideas to make that happen?
>> What are you tolerating that allows conflicts to start and fester?
>> What expectations do you need to set to reduce conflict among your team? In your organization? To whom specifically?
>> What behaviors do you have to start or stop modeling in order to create a culture that is more productive in how people work together?
>> What else do you have to do as a leader to end/prevent unproductive conflicts?

> How might conflicting incentives, structures (reporting relationships, conflicting or unclear roles, policies, recruiting that doesn't match the culture, performance management, unfair or inconsistent polities or compensation/promotions, etc.), and broken or inefficient processes be creating unproductive conflict?
>> For each, what are your ideas to resolve the issues?

> How can you bring people together and help them become more aware of their unique communication styles, behavior traits, and drivers/values to that they understand each other and can work better together?

> What skills might people on your team need to reduce conflicts? How will you get them these skills?

> List each specific conflict that concerns you. For each:
>> What outcome do you want to see from the people involved?
>> What expectations do you need to set?
>> How will you set those expectations?
>> How will you be involved (e.g. mediator, state expectations and let the parties involved resolve it)?
>> What else can you do as a leader to make sure that this conflict is resolved?
>> What is the action plan?

LEAD CHANGE COACHING

Leading change is another huge topic. Let the client tell you where they want coaching. Use active inquiry to let them guide the process. However, usually coaching follows one of these lines of conversation:

> How ready is the organization for change?
>> Where is there support? Who specifically?
>> Where is there resistance? Who specifically?
>> How can you leverage support?
>> How can you isolate resistance?

> What is the **"why"** for the change?

> What is the clear goal and metrics for the change?

> What is the clear case for change, and what is the core message to communicate to the rest of the organization?

> How will you communicate the case for change?

> What are ways you and other leaders will go first, and set the tone? What do YOU need to do to be ready for change?

> How will you enlist supports to create a large enough group to build sufficient momentum for the change to happen?

> What's the path, or process, for change?

> What structures will support the change?

> How will you track progress and communicate results?

> How will you get quick wins?

> How will you support others in getting ideas, developing ideas, and having the organization embrace them?

> How will you handle setbacks?

> How will you communicate progress?

> How will you celebrate results?

SUCCESS IN A NEW ROLE COACHING

> What does success mean in your new role?
>> For you? For the organization? For your manager? For who else?
>> To whom does your success especially matter, and what are the implications for your performance, relationship building, and other actions in your first few months?
>> How can you make sure you have the support and resources you need to succeed?

> How can you make sure you and your manager get off on the right foot?
>> What are your manager's personal and professional goals (Note: for these and other questions, you might have to ask the client how they can find out more about the manager if they are uncomfortable asking directly)?
>> How can you help your manager succeed?
>> What does your manager need you to do immediately? In the near term? Medium term?
>> What is your manager's communication style?
>> How does your manager like to get updates?
>> What are your manager's pet peeves?
>> How can you help your manager have fewer hassles?

> How can you get to know your team?
>> What outcome do you want to achieve with your team in your first few weeks/months?
>> How can you assess your team to make sure you have the right players?
>> How can you set the right tone?
>> How can you learn from them?
>> What activity might help you get to know them?
>> What else is important?

> How can you learn and fit in with the culture?

> How can you get to know key players and align with them? Who do you need to know?

> How can you avoid key landmines and mistakes?

> How can you take enough time to observe and discover before making rash decisions?

> What is your overall development plan in your new role?

> What else is important for your success in your new role?

ENGAGE EMPLOYEES

The key to this type of coaching is to avoid thinking about a monolithic "them." Focus on engaging each employee one at a time.

> Who are your employees?

> How well do you know each employee?
>> Aspirations?
>> Potential?
>> Attitude?
>> Communication style?
>> Behavioral traits?
>> Performance?

> What are overall messages so that each employee knows how they fit into the overall picture and have a sense of purpose?

> How can you set clear expectations for each employee?

> What is the best leadership approach for each employee at this point in time?

> What is the best way to acknowledge and recognize each employee at this point in time?

> What is the best way to develop each employee, if appropriate, at this point in time?

> Where do you have to better earn the right to lead?

> What else is important?

STRATEGIC PLANNING COACHING

There are three parts to this process:

1. The big picture strategic questions. These are designed not to answer perfectly, but rather to identify gaps and brainstorm potential priorities.

2. Come up with no more than three strategic priorities to focus the organization's resources, along with a short tagline to communicate the strategic plan (e.g., expand overseas; quality first; beat Google!).

3. Prepare the organization to execute the plan, so that it won't sit on a shelf.

> Process and logistical questions
>> How far out does the strategy go?
>> Who is involved?
>> Are you doing strategy from scratch, reviewing existing strategy, or looking at an isolated strategic issue?
>> By when should this process be complete?
>> What else?

> Big picture questions
>> What are your vision, mission, and values?
>> What does your SWOT (strengths, weaknesses, opportunities, threats) show?
>> Who are your customers?
>> - Which are worthy of more focus and investment?
>> - Which do you de-emphasize?
>> - Which can you serve better, and how?
>> - Which new markets might you test or expand into?
>> What are your products and services?
>> - Which are worthy of more focus and investment?
>> - Which do you de-emphasize?
>> - Which do you develop and improve, and how?
>> - What new products do you create?
>> Who are your competitors?
>> - How do you beat them, given that they are also thinking about beating you?
>> - What do they do best?
>> - How can you shore up your weaknesses and build on your strengths?

> Where should you spike?
> - What do you need to do to continue to excel in this area?

> Strategic Priorities
>> What are no more than three?
>> What is one slogan or tagline that ties these together?

> Executing the priorities
>> What do you stop doing to make room?
>> How and when are funds released?
>> - Do you test first or go full in?
>> What new people do you need?
>> What new performance incentives?
>> What training?
>> What technology?
>> How do you get buy-in or alignment?
>> Who might resist and how do you get them on board or isolate them?
>> What else do you need in place now?

EXECUTE EFFECTIVELY: INDIVIDUAL

Note: This approach works best when integrated with other sections of the program: perceptual coaching, behavioral coaching, overwhelm & priorities management, powerbase, and influence conversations.

> How is successful execution defined?

> How can commitment be strengthened?

> What assumptions and perceptions might be getting in the way of execution (e.g., limiting perceptions and false assumptions; NB: see that section of the program)

> What is one behavior you can start, stop, do more, or do less to be more productive and execute more effectively?

> How can your time and priorities management be improved so that you execute better

> Which relationships can you strengthen to execute better?

> How can you better budget and ask for resources?

> How can you better use conversational influence to execute?

> What is the plan to improve execution for the specific initiative(s)?

> What quick wins can you achieve?

> How can you leverage supporters?

> How can you influence, neutralize, or isolate the people who might be resisting?

> What risks need to be considered?
>> How will you avoid or mitigate each risk?

> How can you communicate progress more effectively?

> How can you communicate more powerfully on the road from vision to identifying ideas, evaluating and prioritizing, getting commitment, taking action, resolving setbacks, and moving forward from results to the next initiative?

> What else can help you execute more effectively?

EXECUTE EFFECTIVELY: ORGANIZATIONAL EXECUTION

> How can you reduce the number of strategic priorities so that everyone in the organization is focused and not spreading themselves too thinly?

> Which organizational/structural changes can make it easier for everyone to execute?
>> Approvals/reducing bureaucracy
>> Training and development
>> Compensation/rewards
>> Roles
>> Processes
>> Leadership
>> Culture
>> Recruiting
>> Collaboration among different units
>> What else?

> How can leaders better set the tone, create accountability, and clear away obstacles to effective execution?
>> Overall team?
>> Each individual leader?

> How can leadership improve employee engagement, so that employees use discretionary effort to execute?

> What else?

SUCCESSION PLANNING COACHING

Start with general inquiry to understand the client's needs with this challenge. However, in general, there are three parts when coaching on succession planning:

1. Anticipating the needs of the organization for specific roles in leadership.

2. Getting the house in order in terms of processes and structures to recruit, retain, and develop leaders.

3. Traditional succession planning to identify high potential leaders, anticipate roles that need succession plans, and develop or hire people to fill those roles.

› Anticipating needs

   › What are strategic drivers that will define success for the future of the organization?
   › Which talents and roles remain critical?
   › Which new talents and emerging roles will be in demand?
   › How is the organization chart expected to evolve in the future?
   › What are the implications for planning for succession?

› Get the house in order

   › What needs to improve in terms of:
   - Roles?
   - Responsibilities?
   - Career paths?
   - Recruiting?
   - Processes?
   - Development planning?
   - Performance management?
   - Training and development?
   - Reward systems?
   - Knowledge capture and management?
   - Other key HR systems?

› Do traditional planning

   › Anticipate flight risks.
   › Identify roles that require succession plans.
   › Choose internal high potentials to develop.
   › Identify roles that might need to be filled from outside.
   › Develop and test candidates.
   › Create a process to bring people together to discuss and coordinate the above.

› Create an action plan to fill any gaps.

CREATE A HIGH-PERFORMANCE CULTURE

> What is the case for change?

> Define the desired culture
>> Shift from adjectives to specific performance metrics and habits.

> Identify how the leader and leadership team goes first to model the culture:
>> Behaviors?
>> Setting expectations?
>> What will you stop tolerating?
>> How will you set the tone?
>> How will you spend your time?
>> How will you be a model of the new culture?

> What structures are needed to enable the new culture?
>> Recruiting?
>> Rewards?
>> Job design?
>> New hires?
>> Technology?
>> Performance management?

> How will each leader communicate to their teams?

> How will the process repeat at each level of the organization?

> How will the culture change be measured at all levels of the organization?

> How will communication take place throughout the organization?

> How will success be acknowledged?

PERSONAL DOMAINS

> **Evaluate each of the domains outside of work in terms of overall satisfaction:** health, nutrition, fitness, romance, family (children, spouse, parents...), arts, finance, education, personal time/leisure, friends, hobbies, vacation/adventure, community and civic involvement, charity, luxuries, possessions, personal growth and development, spirituality, relaxation, and any other domains that come to mind.

> **Coach the client on any domains highlighted:**
> > What can the client do or have related to this domain to be more focused, have more energy and balance, and recharge in their life?
> > What can the client stop doing, start doing, do more, or do less?
> > What are specific action steps?

> **For any specific domains that need work:**
> > What is your vision for success in this area in the next X years?
> > What is your mission or the "why" behind why this area is important to you?
> > How will you define success?
> > What will you start, stop, do more, or do less in this area and by when?
> > What will you stop doing in other areas, if anything, to make time for this shift?
> > What else is important to think about or do in order to achieve your vision?
> > What are immediate next steps?

SERVICE EXCELLENCE

> What does service excellence mean?

> What are your ideas to get there?

> What will you measure?

> How will you get information about how competitors compare?

> How will you get information about how your organization is really serving customers, from their point of view?

> What values can support service excellence? How will you embed these in your organization?

> How does the customer define value and service excellence? What are the implications for what your organization must do to deliver the customer's expectations?

> What can you standardize to ensure consistency?

> Map out each and every customer interaction. What are opportunities to improve, or even redesign, each one?

> How can you expand authority to employees so that they can handle customer issues and deliver value right away, without delay or bureaucracy?

> Who are your best customers? How can you market more to them so that you find better fits with what your organization already does well?

> How can you create more **"magic moments"** in your service delivery model?

> How can you recruit people who fit your culture and are passionate about serving customers?

> What structures must be improved to ensure success (e.g., training, career paths, rewards)?

> How can you improve employee engagement, especially among managers?

> What technologies can help?

> How can senior leadership set the tone by modeling a commitment to service excellence?

❯ What guarantee or pledge can the organization offer to back up its commitment to service?

❯ What are key issues to resolve and what's the action plan?

BOARD DEVELOPMENT

> What are the key competencies the board should do well (e.g., being a steward of the organizations mission, vision, and values; strategic planning; financial oversight including fundraising; compliance and liability management; leadership selection and assessment; program assessment and improvement; board organization; recruiting and onboarding new board members; maintain boundaries on the board; and decision making)?

> For each competency, how can specific members, and the board overall, be better?

> How do you assess each member of the board's performance overall and on each competency?

> Who will give feedback to board members about how they can be better?

> Which board members might not be a good fit given the future direction of the organization?
>   > What is the plan to remove or replace them?

> What new skills, training, or information will help board members and the overall board perform better?

> What new board members should be added to strengthen the board, help it better represent its constituents, and better achieve its vision and strategy?
>   > What are the criteria to select new board members?
>   > What is the action plan to recruit them?

> What other decisions and actions will help the board be better?

MERGER

- How do you define success for the merger?
  - Financial?
  - Strategic?
  - Operational?
  - Cultural?

- How would you assess the probability of success in each of these areas?

- Given the above, go or no go?

- What is the plan to address any concerns or risks?

- What is the plan to integrate operations?

- How can you prepare to reduce turnover during the merger?

- Which key people should be retained? What's the strategy to do so?

- How will leaders set the tone for the merger's success?

- What oversight will be provided, and by whom, for the key areas of integration?

- How will leadership communicate to the organization consistently and effectively? How often and with which media?

- What is the plan to build and strengthen relationships up, down, and across the newly merged organization?

- Who are potential translators who can be bridges between both new cultures?

- What are commonalities and strengths shared between both organizations? How will you leverage these?

- What drama do you anticipate? How will you manage it?

- What are quick wins to bring the new organization together?

- What are the key issues to make the merger successful? What's the action plan?

COACHING THE GROWING BUSINESS

> **C:** Control the numbers in the business model
>> Which numbers drive revenue? Profit? Cash flow?
>> What lessons can you apply from last period's results to improve the coming period?
>> What are new goals for the key financial drivers?
>> What are the tactics to get there?

> **A:** Aspirations
>> What are your aspirations for your business?
>> What makes you most passionate about running your business?
>> What is your exit plan?
>> What do you want coaching on to get you closer to achieving your aspirations?

> **S:** Strategy
>> What are your top three priorities to focus on moving your business forward to serve your customers and beat the competition?
>> What is your marketing message/positioning statement that clearly sets you apart and compels prospective customers to want to learn more?

> **T:** Tactics
>> What tactics will help you achieve your financial goals?
>> Which ones will you test? What's the plan to do so?
>> Which ones have proven themselves to be ongoing parts of your plan?

> **L:** Leverage
>> How can you spend less time as an employee-owner and more time as a CEO-owner?
>> What attitudes/beliefs do you need to shift to make this possible?
>> How can you develop your people to gain more leverage?
>> What else can you do to make the business less reliant on you?

> **E:** Evolution of the owner as a leader
>> What else do you want to work on to be the leader you know you need to be in order to take the business where you want it to go?

APPENDIX ONE: SUGGESTED EXERCISES

Active Inquiry:

Break into groups of at least three. Roles: coach, client, observer/timer. Each person will rotate, so that everyone plays each role. The person with the shortest hair is the coach first.

Client: Chooses one issue they have and receives coaching on it. At the end, give feedback about the best questions that the coach asked -- the ones that helped you have insights. Share what else the coach did that worked for you.

Coach: Start by confirming a clear goal for the coaching. Use active inquiry to move the client forward. The observer will tell you when there are three minutes remaining. Close the session by asking the client what they found most valuable from the coaching, and what they will do as a result. If you have an insight to share, ask permission to share it. Then find out what the client would want to do next if the coaching were to continue – talk more about your insight or continue in another direction. Conclude by asking what the client found most valuable about the coaching.

Observer/timer. Keep the session to the allotted time. Three minutes before the end, make sure the coach closes out the session per above. If the coach asks a closed-ended (yes/no) question or offers advice, ask the coach to ask an open-ended question instead. Keep a tally of the open-ended questions that the coach asks that move the conversation forward. At the end of the session, give feedback about the best questions the coach asks.

360-Verbal Feedback:

Exercise One:

Choose a non-political celebrity. Break into a group with one coach and everyone else playing the role of one person who would know the celebrity well enough to give feedback about the celebrity as a leader/person. The coach will interview each person by asking the three 360-degree verbal assessment questions. Then work together to synthesizes the results and be ready to present them to the celebrity. The coach will present these results to the whole group.

Exercise Two:

Review the 360-degree feedback from the manager in your packet. Be prepared to present feedback back to the manager as if you were his coach. What do you tell him when you meet?

Leader's Dashboard

Pair up. Alternate as coach and client. Coach your client through at least one part of the Leader's Dashboard. Your client will tell you which piece they want to complete. If time permits, move to another part. When you are done, your client should tell you what they liked best about your coaching.

Clients: If your coach starts giving advice, tell him or her to go back to active inquiry with open-ended questions.

Behavioral Coaching

Break out into groups of two. Coach your client to choose one simple, measurable behavior – framed as a positive activity – to make a habit and that will help them be more effective as a coach or leader. Then coach him or her on one tactic that will help make this behavior a habit.

Reverse roles.

Perceptual Coaching

Break into groups of at least three. Share one limiting belief you have that might hold you back as a coach. Work with a coach to try to reframe the belief using one of the approaches shared on the page.

Powerbase Coaching

Exercise One – current network of professional relationships:

Break into groups of up to three. Work with a coach to find at least one way to improve your powerbase after the seminar. Examples of suitable goals: choose one key relationship in your current network to improve; develop an overall plan to systematically improve your network; find a way to leverage a relationship so that he or she introduces you to other people; identify new ways to get more visible and expand your network with higher-level decision makers.

As always, after you coach, spend time getting advice about what worked with your coaching.

Exercise Two – powerbase from the future:

Break into groups of up to three. Get coaching on your ideal vision for your career. Choose some amazing people who will know you when you are successful. Pick one. Get coaching on how you met that person, as if it already happened. Get coached so that you tell this story at least three

ways, none constrained by how you have met people in the past. Then get coaching on what this means for how you have to show up differently than you have been showing up.

Each coach gets advice about what worked with their coaching. Leave time for this feedback!

Personal Branding

Break into groups and each person gets coached on whatever they feel is important to improve their personal brand. Coach: let the client tell you what they want from the coaching.

Team data exercise

Use the data from a team assessment. Depending on how many groups can be formed, groups can focus on any of the following. If there are more than five groups, you can repeat the work of groups 1-3 by having two groups – one that must present their findings in the form of specific coaching questions, while the other must present their findings in the form of bullet-point consultant-style advice.

Group 1: Team members are the clients (focus on each other)

What advice would you give team members about working together effectively? Do not include the team leader in your assessment. Focus only on team members. Look for potential blind spots and potential conflicts on traits and styles that have lots of variation.

Group 2: Team members are the client (focus on working with team leader)

What advice would you give to team members about working effectively with the team leader?

Group 3: The team leader is the client (focus on working with team members)

What advice would you give to the team leader about working with members of the team effectively?

Group 4: You are a marketing consultant trying to come up with a marketing message to promote this team to the marketplace.

What strengths does the team have that set it apart? For instance, if the team were a consulting firm, how does the team assessment show a possible USP or unique selling proposition based on the profile of the overall team?

Group 5: You are a Human Resources consulting firm.

Given the team's profile, who else might you recruit to the team to add to its strengths or balance out any blind spots that you observe based on the team profile? Make whatever assumptions you want about the nature of the team and its goals, or just assume that this is a management consulting firm.

Time Management

Break into groups of two. Each person receives coaching to do any or all of the following: 1. Describe their ideal day or week as a coach; 2. Have at least one insight about one change they can make to their time to be more effective in their coaching practice and start to create their ideal day or week.

Give and receive feedback about what worked well.

Influence

Break into groups of up to three. Each person identifies one person they want to influence and an influence goal. The coach uses the influence process to get into a role play situation with them and to practice role play. Move to role play as quickly as possible. The main goal of this exercise is to experience role play practice. During role play, stop after two minutes each time, and debrief. Ask the client what worked, what they would have done differently, and what they want to practice next. Let the client come to their own conclusions as much as possible.

Conceptualizing Coaching Engagements

How would you structure a coaching engagement with a client facing any of following issues? Draw up your plan, including:

> length of the engagement;

> how often you will meet, and whether frequency will change over time;

> any up front work (assessments, retreats, interviews);

> how you will track and measure results; and

> anything else that might be relevant (e.g., pricing - for external coaches).

Discuss your plan for any of these, or any other challenge you want to address with clients:

> A client wants to develop leadership presence (Hint: "leadership presence" is a broad term).

> A client, let's say a sales manager, gets fantastic results, but does so with very high turnover, low engagement, and what others call "leaving lots of bodies in his wake."

> A senior leader is facing burn out and wants your help finding something new and rewarding to do with the remaining 5-10 years of his productive full-time career.

> The executive team of a fast-growth company is noticing that they are starting to face problems related to growth. They are experiencing more conflict, problems with overlapping roles, sloppiness due to lack of systems and processes, and a lack of people with the skills to take on more responsibility. They want a coach, or coaches, who can help.

> A client needs help because he micromanages and won't delegate.

> A company finally wants to make succession planning part of its fabric, rather than reacting whenever a key person leaves.

> A client wants to move a number of high potential employees from what they call the "3rd quadrant" of the bell curve, the quadrant just to the right of the median, to the "4th quadrant," the quadrant on the far right of the bell curve.

> The COO of a $250 million organization has just been promoted to CEO. He has fantastic skills in operations, and the board has given him a mandate to be more visionary and strategic. You are hired to help.

> A client wants a complete, comprehensive program to improve engagement scores. They realize that a single approach, like training or coaching, won't be enough.

> A client is being hit on all sides and is overwhelmed. He is CEO of a regional bank that is suddenly being investigated for serious capital coverage issues; the board is losing faith in his leadership and might fire him. His wife has told him she is leaving him. And his son, a teenager, just got in trouble with the police for shooting a neighbors window with a bb gun. How do you proceed?

> A CEO wants to change the culture of the organization from X to Y, for instance, from bureaucratic to entrepreneurial. How can you coach this client to success?

Accountability

Coach the client on how they will take what they learned and apply it after the seminar. The client chooses their own time line. Be sure you are holding the client accountable. Are you concerned they are thinking too small? Avoiding accountability? Being too vague? Be open and honest about it. Hold them accountable, without being obnoxious.

APPENDIX TWO: BOARD CERTIFIED COACH EXAMINATION (BCCE) DOMAINS

The Board Certified Coach program includes the following domains and behaviors. As you progress through the program and practice coaching, be sure to incorporate these into your work. Pre-plan before a coaching session to practice these in a disciplined manner. After a coaching session, review which behaviors you demonstrated and opportunities to improve. As you progress through our curriculum, listen for our discussion of these areas.

1. Ethical and Regulatory Guidelines

A.	Obtain agreement on the parameters of confidentiality in coaching
B.	Identify any dual relationship issues that could influence the coaching process
C.	Obtain coachee agreement on the nature of coaching
D.	Obtain coachee agreement on the limits of coaching
E.	Obtain agreement on the process of confidentiality in coaching
F.	Inform coachee about legal dimensions of the coaching relationship
G.	Agree to accessibility protocols
H.	Obtain authorization for release of coachee information
I.	Practice liability risk management
J.	Inform coachees of ethical standards of coaching
K.	Explain coach and coachee roles in coaching
L.	Maintain a physically safe environment for service provision
M.	Explain coaching processes to coachee
N.	Apply standards of practice in coaching
O.	Maintain appropriate coachee case notes and records
P.	Operate within the coachee's ethical system without violating coach's own code of ethics
Q.	Obtain agreement on the parameters of confidentiality in coaching
R.	Adhere to BCC Code of Ethics
S.	Clarify roles and responsibilities in sharing data prior to assessment
T.	Establish and maintain trust
U.	Maintain a sense of mutual respect
V.	Establish and maintain confidentiality for virtual coaching

2. Coaching Knowledge and Applications

A. Use silence

B. Use mirroring

C. Ask affective questions

D. Use the linking process

E. Ask analytical questions

F. Use challenging statements or questions

G. Use/model effective nonverbal communication

H. Use paraphrasing

I. Use summarizing

J. Ask clarifying questions

K. Ask connecting questions

L. Ask probing questions

M. Interpret nonverbal communication

N. Ask exploratory questions

O. Ask reflective questions

P. Use empathy

Q. Use open-ended questions as a method of investigation

R. Provide encouragement

S. Use active listening

T. Demonstrate compassion

U. Use ambiguity

V. Use metaphors

W. Assist coachee to adapt and modify coachee's belief and value systems to achieve goals

X. Modify the coaching process based on any issue that influences the coachee's goals

Y. Use humor

Z. Use reframing

AA. Challenge coachee to test assumptions and biases

AB. Use appropriate reinforcement techniques throughout the helping process

AC. Assist coachee in understanding belief and value systems that impact goals

AD. Exhibit curiosity

2. Coaching Knowledge and Applications

AE.	Assist coachee in understanding their current perspective (framing)
AF.	Assist coachee in gaining new perspective (framing)
AG.	Recognize culturally sensitive communication
AH.	Assist coachee in understanding balance of life roles in careers
AI.	Discuss work–life balance with coachee
AJ.	Model self-disclosure
AK.	Coordinate coaching plan with other service providers
AL.	Offer insight
AM.	Promote effective decision-making
AN.	Explore ideas
AO.	Assist the coachee in role transitions
AP.	Assist coachee in building skills
AQ.	Assist coachee in building confidence
AR.	Facilitate coachee development of decision-making skills
AS.	Assist coachee with managing conflict
AT.	Foster effective communication
AU.	Provide candid and clear feedback
AV.	Provide coaching via distance technologies
AW.	Co-create a comprehensive coaching plan
AX.	Facilitate coachee use of information resources in coaching
AY.	Assist the coachee in locating relevant information and resources
AZ.	Co-develop a coachee's goal regarding whether it is conceivable, believable, achievable, measurable, and desirable, given a coachee case
BA.	Clarify coachee barriers related to decision making
BB.	Assist the coachee in understanding the potential risks in decision-making and strategies to minimize risks
BC.	Assist the coachee in identifying, developing, and using appropriate support systems
BD.	Clarify coachee barriers related to goals
BE.	Create coachee accountability plan
BF.	Assist the coachee in setting short- and long-term goals
BG.	Assist coachee in creating a personal action plan

2. Coaching Knowledge and Applications

BH.	Assist the coachee in identifying potential strategies for meeting goals
BI.	Assist the coachee in clarifying goal(s)
BJ.	Accommodate coachee's communication needs when possible
BK.	Facilitate communications with coachees having limited language proficiency and provide referrals when necessary
BL.	Affirm the coachee's autonomy
BM.	Facilitate coachee access to additional services and resources
BN.	Facilitate coachee's self-coaching skills
BO.	Support the coachee's development of sustainable plan post-coaching
BP.	Maintain a non-judgmental approach in the coaching process
BQ.	Maintain honest and straightforward communication
BR.	Assist the coachee in moving from awareness to action
BS.	Provide acknowledgment
BT.	Gain permission before challenging
BU.	Assist coachee in identifying relevant life experiences
BV.	Model the acceptance of a challenge
BW.	Encourage reevaluation of goals
BX.	Model creativity
BY.	Challenge coachee to move beyond their comfort zone
BZ.	Demonstrate flexibility in coachee goal revision
CA.	Use immediate interactions to advance the coaching process
CB.	Model self-awareness
CC.	Model acceptance
CD.	Facilitate openness
CE.	Model effective interpersonal communication
CF.	Assist the coachee in taking action based on data
CG.	Discuss coachee's progress toward accomplishing goals
CH.	Provide peer coaching when appropriate
CI.	Generate possibilities and brainstorm

3. Assessment

A. Recognize when coachee needs a referral for other professional services

B. Clarify coachee's current use of alcohol and/or other substances

C. Identify alternative coaching approaches for coachees with special needs

D. Identify any sexual orientation factors that could influence the coaching process

E. Identify multicultural issues that could influence coachee goals

F. Identify learning issues that could influence coachee goals

G. Identify any racial factors that could influence the coaching process

H. Identify health issues that could influence coachee goals

I. Identify potential for coachee to harm self and/or others

J. Identify any gender factors that could influence the coaching process

K. Identify any spiritual factors that could influence the coaching process

L. Identify any multicultural factors that could influence the coaching process

M. Identify other issues that could influence coachee goals

N. Identify any health factors that could influence the coaching process

O. Identify any developmental factors that could influence the coaching process

P. Identify relationship issues that could influence coachee goals

Q. Identify any other issues/factors that could influence the coaching process

R. Identify behavioral issues that could influence coachee goals

S. Explore differences in organizational environments

T. Clarify coachee attitudes toward work and workers

U. Clarify coachee decision-making processes

V. Identify coachee's preferred processes for meeting goals

W. Clarify coachee personal parameters (e.g., values, beliefs, needs, interests, tendencies) related to choices and alternatives

X. Assess coachee strengths related to goals

Y. Identify coachee readiness for coaching

Z. Monitor coachee progress toward goal attainment

AA. Monitor coachee progress in coaching

AB. Identify any past coachee experience with helping services

AC. Observe coachee behaviors in the moment

3. Assessment

AD.	Use various assessment strategies appropriate to the coaching process
AE.	Use available coachee data in support of the assessment process
AF.	Use various assessment strategies appropriate to the goals of the coachee
AG.	Assist the coachee in interpreting assessment results
AH.	Assess the culture of coachee's environment
AI.	Assess coaching outcomes

4. Practice Management

A.	Integrate appropriate coaching theories, strategies, and models in assisting the coachee
B.	Seek supervision as needed
C.	Correspond as needed with coachee
D.	Advocate for the practice of coaching
E.	Be aware of different modalities of delivering coaching services
F.	Seek mentoring as needed
G.	Promote awareness of coaching
H.	Collaborate with coachee on appropriate termination
I.	Consult with other professionals when appropriate
J.	Self-assess strengths, development gaps, and limitations as a coach
K.	Maintain a referral network
L.	Identify any personal barriers to coaching effectiveness
M.	Assess individual effectiveness as a coach
N.	Use coaching-related research
O.	Maintain needed knowledge and skills with continuing education
P.	Conduct post-coaching follow-up activities, including evaluation of services
Q.	Clarify roles and responsibilities with any sponsor as appropriate
R.	Prepare an estimated timeline for coaching services
S.	Seek feedback from coachee regarding coaching process

APPENDIX THREE: ICF COACHING CORE COMPETENCIES

A. Foundation

1. Demonstrates Ethical Practice

Definition: Understands and consistently applies coaching ethics and standards of coaching.

- › Demonstrates personal integrity and honesty in interactions with clients, sponsors and relevant stakeholders
- › Is sensitive to clients' identity, environment, experiences, values and beliefs
- › Uses language appropriate and respectful to clients, sponsors and relevant stakeholders
- › Abides by the ICF Code of Ethics and upholds the Core Values
- › Maintains confidentiality with client information per stakeholder agreements and pertinent laws
- › Maintains the distinctions between coaching, consulting, psychotherapy and other support professions
- › Refers clients to other support professionals, as appropriate

2. Embodies a Coaching Mindset

Definition: Develops and maintains a mindset that is open, curious, flexible and client-centered.

- › Acknowledges that clients are responsible for their own choices
- › Engages in ongoing learning and development as a coach
- › Develops an ongoing reflective practice to enhance one's coaching
- › Remains aware of and open to the influence of context and culture on self and others
- › Uses awareness of self and one's intuition to benefit clients
- › Develops and maintains the ability to regulate one's emotions
- › Mentally and emotionally prepares for sessions
- › Seeks help from outside sources when necessary

B. Co-Creating the Relationship

3. Establishes and Maintains Agreements

Definition: Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session.

> Explains what coaching is and is not and describes the process to the client and relevant stakeholders

> Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders

> Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others

> Partners with the client and relevant stakeholders to establish an overall coaching plan and goals

> Partners with the client to determine client-coach compatibility

> Partners with the client to identify or reconfirm what they want to accomplish in the session

> Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish in the session

> Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement or individual session

> Partners with the client to manage the time and focus of the session

> Continues coaching in the direction of the client's desired outcome unless the client indicates otherwise

> Partners with the client to end the coaching relationship in a way that honors the experience

4. **Cultivates Trust and Safety**

Definition: Partners with the client to create a safe, supportive environment that allows the client to share freely. Maintains a relationship of mutual respect and trust.

> Seeks to understand the client within their context which may include their identity, environment, experiences, values and beliefs

> Demonstrates respect for the client's identity, perceptions, style and language and adapts one's coaching to the client

> Acknowledges and respects the client's unique talents, insights and work in the coaching process

> Shows support, empathy and concern for the client

> Acknowledges and supports the client's expression of feelings, perceptions, concerns, beliefs and suggestions

> Demonstrates openness and transparency as a way to display vulnerability and build trust with the client

5. Maintains Presence

Definition: Is fully conscious and present with the client, employing a style that is open, flexible, grounded and confident

> Remains focused, observant, empathetic and responsive to the client
> Demonstrates curiosity during the coaching process
> Manages one's emotions to stay present with the client
> Demonstrates confidence in working with strong client emotions during the coaching process
> Is comfortable working in a space of not knowing
> Creates or allows space for silence, pause or reflection

C. Communicating Effectively

6. Listens Actively

Definition: Focuses on what the client is and is not saying to fully understand what is being communicated in the context of the client systems and to support client self-expression

> Considers the client's context, identity, environment, experiences, values and beliefs to enhance understanding of what the client is communicating
> Reflects or summarizes what the client communicated to ensure clarity and understanding
> Recognizes and inquires when there is more to what the client is communicating
> Notices, acknowledges and explores the client's emotions, energy shifts, non-verbal cues or other behaviors
> Integrates the client's words, tone of voice and body language to determine the full meaning of what is being communicated
> Notices trends in the client's behaviors and emotions across sessions to discern themes and patterns

7. Evokes Awareness

Definition: Facilitates client insight and learning by using tools and techniques such as powerful questioning, silence, metaphor or analogy

> Considers client experience when deciding what might be most useful
> Challenges the client as a way to evoke awareness or insight
> Asks questions about the client, such as their way of thinking, values, needs, wants and beliefs

> Asks questions that help the client explore beyond current thinking

> Invites the client to share more about their experience in the moment

> Notices what is working to enhance client progress

> Adjusts the coaching approach in response to the client's needs

> Helps the client identify factors that influence current and future patterns of behavior, thinking or emotion

> Invites the client to generate ideas about how they can move forward and what they are willing or able to do

> Supports the client in reframing perspectives

> Shares observations, insights and feelings, without attachment, that have the potential to create new learning for the client

D. Cultivating Learning and Growth

8. Facilitates Client Growth

Definition: Partners with the client to transform learning and insight into action. Promotes client autonomy in the coaching process.

> Works with the client to integrate new awareness, insight or learning into their worldview and behaviors

> Partners with the client to design goals, actions and accountability measures that integrate and expand new learning

> Acknowledges and supports client autonomy in the design of goals, actions and methods of accountability

> Supports the client in identifying potential results or learning from identified action steps

> Invites the client to consider how to move forward, including resources, support and potential barriers

> Partners with the client to summarize learning and insight within or between sessions

> Celebrates the client's progress and successes

> Partners with the client to close the session