Creating a Coaching Plan Toolkit
Coach the Root Cause, Not the End Result

- Maximize your coaching efforts by ensuring that you focus on the root cause of an employee’s area of weakness, rather than just the surface-level issue. (For example, an employee with poor communication skills may have an underlying weakness—such as a lack of product knowledge—that you must make sure to address, rather than just focusing on improving his/her communication skills.)

- If you understand why an employee struggles in a particular area, you can better improve the skill.

Measure Your Coaching Success by Your Employee’s Improvement

- A coaching plan benefits both you and your employee in two ways:
  1. It sets a course for consistent coaching efforts across a development cycle, which ensures steady growth as opposed to coaching in “spurts.”
  2. It focuses your efforts on one or two skills and ensures alignment between your employee’s development areas and your coaching efforts.

- Although you should have milestones and target dates for your coaching activities, the true measure of your coaching efforts is the degree to which your employee improves in the targeted skill area.
**Sample Development Area Root Cause Analysis**

Employees often target general skills in their development plans (e.g., “I have problems getting projects in on time. I need to work on my project management skills.”). The problem confronting managers is that these skills are usually just symptoms of the root cause. While treating the symptoms can create some improvement, the returns on your coaching efforts are maximized when you focus on the root cause itself. The diagram below provides an example of how different components can actually impact a particular development area:

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**Sample Root Cause Analysis of an Employee's Difficulty in Managing Projects**

**Development Area:** Project Management

- **Poor Time Management**
  - Spends too long on projects

- **Poor Prioritization**
  - Cannot discern between urgent and important

- **Inability to Say “No”**
  - Takes on new tasks when asked regardless of time to do so

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**Possible Approaches**

- **Encourage Efficient Use of Time**
  - Have employee schedule particular parts of his/her day to accomplish different tasks.
  - Provide clear guidance to help employee differentiate between “expected” performance and “perfect” performance.

- **Provide Guidance on Identifying “Important”**
  - Explain the organization’s and team’s big picture strategy.
  - Encourage employee to fill out an “urgency/impact” matrix with his/her assignments and view it with him/her.

- **Explain Job Responsibilities to Employee and Peers**
  - Provide a script on how to say “no” to colleagues professionally.
  - Help employee establish clearer boundaries on his/her job responsibilities.

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**The Root Cause Should Determine Your Coaching Strategy**—Take the time to ensure you understand the underlying root cause of a development weakness so you can implement the most effective coaching approach.
**COACHING PLAN TEMPLATE**

Coaching plans serve two purposes: they create a foundation for consistent coaching efforts across the development cycle, and they ensure that the manager’s coaching activities are supporting their employees' development goals. To that end, the coaching plan outlines the responsibilities of both the employee and the manager. The employee’s responsibilities—such as activities and success measures—are generally pulled from his/her development plan to ensure targeted development. The manager’s responsibilities center on the specific coaching activities he/she will perform over the course of the coaching plan, and milestones ensure that coaching obligations are being met. The success of a coaching plan is ultimately decided by the employee’s improvement.

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**Sample Coaching Plan**

<table>
<thead>
<tr>
<th>Employee Responsibilities</th>
<th>Manager Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Areas</td>
<td>Manager Should Focus on Activities That Help Employee Learn and Apply Lessons</td>
</tr>
<tr>
<td>Closing (Specifically, handling objections)</td>
<td>To ensure the employee and manager are working toward the same goals, the employee’s development areas, the activities he/she should engage in, and the metrics that track successful progress against these goals should be identical to those in the employee’s development plan.</td>
</tr>
<tr>
<td>1. Shadow top salespeople on visits to potential clients</td>
<td>1. Sit in on closing calls, providing immediate feedback</td>
</tr>
<tr>
<td>2. Script ways to handle objections</td>
<td>2. Discuss why closing did or did not occur after all sales visits</td>
</tr>
<tr>
<td>Success Measures</td>
<td>Milestones</td>
</tr>
<tr>
<td>1. Lifts sales by 5%</td>
<td>1. Sit in on one call per week</td>
</tr>
<tr>
<td>2. Turn around one solid “no”</td>
<td>2. After each sales visit</td>
</tr>
</tbody>
</table>

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**Success Is Measured by Employee Improvement**

While coaching plans outline the activities a manager commits to, the true measure of a plan’s success is the development of the employee. If an employee fails to demonstrate growth or to reach his/her goals, it may become necessary to revisit the plan.
**Coaching Plan Template (Continued)**

Use the table below to ensure that your coaching efforts are aligned with your employees' development areas.

<table>
<thead>
<tr>
<th>Employee Responsibilities</th>
<th>Manager Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Areas</td>
<td></td>
</tr>
<tr>
<td>Employee Activities</td>
<td>Success Measures</td>
</tr>
<tr>
<td></td>
<td>Manager Activities</td>
</tr>
<tr>
<td></td>
<td>Milestones</td>
</tr>
<tr>
<td></td>
<td>Target Dates</td>
</tr>
</tbody>
</table>