Day-to-Day-Coaching

Table of Contents

I. Planned Coaching Opportunities 2
II. Planned Coaching Opportunities 3
   Overview 3
   Developing Through Your Work—Instructions 4
   Developing Through Your Work 5
   Anticipate, Act, and Reflect 6
   Simple Questions to Ask Before, During, and After 7
   Planned Development Experiences 7
   Applying Lessons to My Future Work—Instructions 8
   Applying Lessons to My Future Work 8
III. Coaching in the Moment 9
   Overview 9
   In-the-Moment Coaching Opportunities—Instructions 10
   In-the-Moment Coaching Opportunities 11
   Five Simple Questions to Coach in the Moment 12
I. INTRODUCTION

About This Research

Although managers spend approximately 20% of their time developing their employees, their efforts are rated as very ineffective to neutral by a majority of their teams.

In an ideal world, managers would be able to assign employees projects based on the skills they need to develop to succeed at their current levels and beyond. The reality, however, is that managers must assign projects according to employee strengths to achieve business objectives.

Attempting to address development areas through job rotations or stretch roles also presents a challenge, as these opportunities are often scarce. Therefore, managers must rely almost entirely on their employees’ daily work to serve as the platform for their coaching and development efforts.

As such, this guide is designed to help managers improve their coaching efforts by using their employees’ job tasks, assignments, and responsibilities to develop the skills employees need. In addition, the guide will help managers identify in-the-moment coaching opportunities—unexpected events that hold valuable lessons employees can apply to further develop their skills. This guide is divided into two sections:

- Section I: Planned Coaching Opportunities
- Section II: Coaching in the Moment

COPIES AND COPYRIGHT

As always, members are welcome to an unlimited number of copies of the materials contained within this handout. Furthermore, members may copy any graphic herein for their own internal purpose. The Corporate Executive Board Company requests only that members retain the copyright mark on all pages produced. Please contact your Member Support Center at +1-866-913-8102 for any help we may provide.

The pages herein are the property of The Corporate Executive Board Company. Beyond the membership, no copyrighted materials of the Corporate Executive Board Company may be reproduced without prior approval.

LEGAL CAVEAT

The HR Leadership Council has worked to ensure the accuracy of the information it provides to its members. This report relies upon data obtained from many sources, however, and the HR Leadership Council cannot guarantee the accuracy of the information or its analysis in all cases. Furthermore, the HR Leadership Council is not engaged in rendering legal, accounting, or other professional services. Its reports should not be construed as professional advice on any particular set of facts or circumstances. Members requiring such services are advised to consult an appropriate professional. Neither the Corporate Executive Board Company nor its programs are responsible for any claims or losses that may arise from a) any errors or omissions in their reports, whether caused by the HR Leadership Council or its sources, or b) reliance upon any recommendation made by the HR Leadership Council.
II. PLANNED COACHING OPPORTUNITIES

Overview

1. Use Current Employee Tasks, Jobs, and Responsibilities to Build Targeted Skills
   In a perfect world, managers would be able to assign projects, tasks, and responsibilities based on the skills employees need to develop. The reality is that most managers have to coach “the hand they are dealt”—trying to build skills within a set of assignments determined by business need, not development need. Fortunately, most tasks or projects have many developmental components, and by thinking creatively, a manager can use a current role to build a needed skill set.

   To help your employees identify development opportunities within their current roles, please review the “Development Through Your Work” sheet on pages 4 and 5.

2. Anticipate, Act, and Reflect on Lessons Learned Through Daily Work
   Many managers help their employees derive key lessons from their work by post-project discussions that focus on what went right, what went wrong, and what an employee will change in the future. But by identifying the lessons one wants to learn before the project, task, or assignment begins, a manager and Employee can ensure that development areas are being addressed.

   Use the “Anticipate, Act, and Reflect” summary on page 6 and “Simple Questions to Ask Before, During, and After Planned Development Experiences” on page 7 to maximize the lessons learned in daily work.

3. Applying Lessons Learned Increases Their Value
   Identifying a key lesson from previous experience is only learning the lesson; the next step is ensuring that the lesson is consistently applied. Indeed, it’s not until an employee takes the lesson and incorporates it into his or her future behavior that the lesson is truly learned. By making employees accountable for applying the lessons from the past into their work in the future, you are ensuring that your coaching efforts are building targeted skills.

   Give your employees the “Applying Lessons to My Future Work” sheet on page 8 to help them reflect on the lessons they’ve learned and identify opportunities to apply them in the future.
II. PLANNED COACHING OPPORTUNITIES (CONTINUED)

Development Through Your Work—Instructions

From a development perspective, it would be ideal if managers could assign projects based on the development needs of their team. But project assignments are determined by business need, and managers need to rely on an employee’s current portfolio of activities to build skills identified as development areas.

This checklist—which can be incorporated into the project planning process—is designed to help your employees think creatively about a particular job, task, or assignment to identify components that can target development areas. This sheet is not a requirement; it’s simply meant to assist your employees if they are having difficulty understanding how they can develop and improve skills through current projects.

The examples below demonstrate how one employee uses the sheet to find opportunities to develop his or her communication skills.

<table>
<thead>
<tr>
<th>Task: Serving as a Mentor for a New Member of the Team</th>
<th>Current Assignment</th>
<th>Stretch Role</th>
</tr>
</thead>
</table>

### Critical Components of the Role

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create a checklist for the new team member letting him or her know what to do first.</td>
</tr>
<tr>
<td>2</td>
<td>Help the new team member learn askill or process.</td>
</tr>
<tr>
<td>3</td>
<td>Help the new team member understand how things “really work”.</td>
</tr>
</tbody>
</table>

Skill Area(s) Needed: Process management, Coaching, Communication

<table>
<thead>
<tr>
<th>Task: Managing a Project</th>
<th>Current Assignment</th>
<th>Stretch Role</th>
</tr>
</thead>
</table>

### Critical Components of the Role

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Scoping out the project and building a business case</td>
</tr>
<tr>
<td>2</td>
<td>Creating a project plan</td>
</tr>
<tr>
<td>3</td>
<td>Holding others on the team accountable for reaching project milestones on time</td>
</tr>
<tr>
<td>4</td>
<td>Presenting results to others on the team, other business units, or senior leaders</td>
</tr>
</tbody>
</table>

Skill Area(s) Needed: Business acumen, Project management, People management, Communication

Focus your coaching efforts on the components of a task or assignment that build a skill in a development area.
II. PLANNED COACHING OPPORTUNITIES (CONTINUED)

Development Through Your Work

Often we receive assignments that do not appear to be ideally suited in helping us achieve our development goals. However, every assignment, task, project, or role has a number of critical components that must be completed to ensure its success. If you are having difficulty seeing how your current projects can help you achieve your development goals, take the time to fill out the sheet below, noting the three to five critical components of each project and the skills they require. You can then focus your development efforts on a project component that builds a skill that you’ve identified as a development area.

<table>
<thead>
<tr>
<th>Task:</th>
<th>Current Assignment</th>
<th>Stretch Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Components of the Role</td>
<td>Skill Area(s) Needed</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task:</th>
<th>Current Assignment</th>
<th>Stretch Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Components of the Role</td>
<td>Skill Area(s) Needed</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
II. PLANNED COACHING OPPORTUNITIES (CONTINUED)

Anticipate, Act, and Reflect

It’s not enough to focus on key lessons learned after the fact. Managers who encourage their employees to anticipate, act, and reflect on key lessons before, during, and after a project, assignment, or task ensure important lessons are identified, critical skills are built, and coaching efforts are maximized.

- **Anticipate**
  - Which experiences should employees pursue, and what lessons should employees expect to learn?

- **Act**
  - How can employees incorporate these experiences into their work?
  - What lessons did employees learn from their experiences (and mistakes)?

- **Reflect**
  - How can employees apply these lessons to their work?

You can better focus your coaching efforts if you identify development goals before the project starts.
## II. PLANNED COACHING OPPORTUNITIES (CONTINUED)

**Simple Questions to Ask Before, During, and After Planned Development Experiences**

The questions below can be used at various project stages. These are merely suggestions, and managers are free to use their own questions to ensure that critical lessons are identified and learned and that employees are planning to apply these lessons in the future.

### Pre-Activity

1. What do you hope to learn from this project?
2. What will you be able to do directly?
3. What do you need from or expect of me?

### During Activity

1. Where do you feel that you are improving your skills?
2. Where do you feel that you are struggling?
3. Where do you need me to support through coaching?

### Post-Activity (To be answered by employee before meeting with manager)

1. What did I learn?
2. Did I reach the goals I laid out before the project started?
3. Did I improve my skill(s)?
4. Where can I use this skill in my daily work?
5. How can my manager help me apply this skill?

### Post-Activity (For discussion with manager)

1. Where do you feel you succeeded?
2. Where did you struggle?
3. If you had to do it all over again, what would you do differently?
4. What is the most important lesson you learned?
5. Where can you apply this lesson in the future?
II. PLANNED COACHING OPPORTUNITIES (CONTINUED)

Applying Lessons to My Future Work—Instructions

The sheet below is meant for your employees to use as they 1) reflect on their experiences, 2) identify critical lessons learned, 3) create a plan for applying those lessons in the future, and 4) note the milestones they will use to track their progress. This sheet can be used informally to prepare for a development conversation between you and your employee or formally, as a method to hold your employee accountable for applying lessons learned.

Applying Lessons to My Future Work

Once a project is over, it’s important not only to think about the lessons you’ve learned, but to develop a plan for applying them in the future. These questions are designed to help you 1) reflect on your experiences, 2) identify critical lessons learned, 3) create a plan for applying these lessons, and 4) note the milestones you will use to track your progress.

Project/Task:
What lessons did I learn in the past that I applied to this project? ____________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
What did I find the most challenging? ________________________________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
What did I do well? _____________________________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
What will I do differently in the future? ______________________________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
Where can I apply these lessons to my job in the future? ______________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
What milestones will I use to measure success? Who will I enlist to hold me accountable for applying these lessons?
_____________________________________________________________________________________________
_____________________________________________________________________________________________
III. COACHING IN THE MOMENT

Overview

1. Everyday Interactions Can Provide Rich Coaching Opportunities
   While creating a plan to achieve development objectives through current projects is critical to ensuring those goals are met, there are a number of unexpected events—such as project successes or failures—that also provide opportunities to learn. Indeed, many managers overlook these events, focusing solely on their business impact and missing the opportunity to coach in the moment. By using simple frameworks, managers can further develop their employees through the identification of new lessons and the reinforcement of old ones.

   To review coaching opportunities you may have missed, please view “In-the-Moment Coaching Opportunities” on pages 10 and 11.

2. Address Pressing Business Issues BEFORE Taking Advantage of In-the-Moment Coaching Opportunities
   An important caveat as you seek to take advantage of unexpected coaching moments: If there are critical business issues at stake, it is important to address them first. If you focus on the development opportunity at the expense of the business issue, you risk exacerbating any existing problems.

3. Focus on Key Questions to Transform Daily Interactions into Coaching Moments
   Using a framework of questions to identify critical lessons can help ensure you are not only capturing these lessons, but you are changing the quality of your daily employee interactions. It’s important to note, however, that not every interaction with an employee is a coaching opportunity; if you insist on making every interaction a coaching opportunity, you risk creating the perception that your employees’ efforts are never good enough.

   Use “Five Simple Questions to Coach in the Moment” on page 12 to help you turn everyday interactions into valuable coaching moments.
III. COACHING IN THE MOMENT (CONTINUED)

In-the-Moment Coaching Opportunities—Instructions

If you’re like most managers, you often view coaching as a fairly formal activity; you set time aside in your calendar to teach an employee a new skill or procedure, provide formal or informal feedback, or review a recently completed project. By taking advantage of the daily interactions you have with your employees (e.g., project updates, questions regarding next steps); you can blend coaching into your daily routine. Most importantly, you can improve the quality of your interactions and strengthen your relationships.

To help you recognize future unexpected coaching opportunities, use the sheet on the following page to identify opportunities you may have missed in the past. What interactions have you had over the past two weeks that would have served as opportunities to coach your employees?

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Day</th>
<th>What did the employee and I talk about?</th>
<th>What questions could I have asked to make this a coaching opportunity?</th>
</tr>
</thead>
<tbody>
<tr>
<td>M. Jones</td>
<td>Monday</td>
<td>Mike asked me the best way to approach a very demanding customer, and I immediately answered his question.</td>
<td>I could have asked Mike what action he was considering first and his reservations about why it wasn’t the best course of action. Then we could have discussed strategies together.</td>
</tr>
<tr>
<td>S. Lee</td>
<td>Thursday</td>
<td>We met for an unscheduled project check-in.</td>
<td>I could have not only focused on process and timelines but asked what she was most excited about or what she learned in the past week.</td>
</tr>
</tbody>
</table>

Asking for an employee’s thoughts before immediately answering a question provides an opportunity to understand where he or she is struggling and put him or her on the right track.
III. COACHING IN THE MOMENT (CONTINUED)

In-the-Moment Coaching Opportunities

Use this sheet to review where you may have missed an unexpected opportunity to coach or reinforce critical lessons across the past two weeks. By recognizing these missed coaching opportunities, you’re improving your ability to recognize and capitalize on them in the future.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Day</th>
<th>What did the employee and I talk about?</th>
<th>What questions could I have asked to make this a coaching opportunity?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
III. COACHING IN THE MOMENT (CONTINUED)

Five Simple Questions to Coach in the Moment

The best coaching opportunities are often unplanned. Once you’ve recognized an unexpected in-the-moment coaching opportunity, use the five questions below to capitalize on it.

For example, if a customer calls raving about a member of your team, you can use the opportunity to reinforce a development area such as communication. By focusing on how your employee used communication skills effectively or ineffectively, what lesson he or she learned, and how he or she plans to apply this lesson, you’ve helped ensure that this success will be repeated in the future.

1. Where did you need to use X skill to get things done?

2. Where did you feel comfortable in your use of X skill?

3. Where did you feel that your X skill was not as strong as it could have been?

4. What key lesson did you learn with regard to your X skill?

5. How will you use X skill differently in the future?