

Coaching Preparation Form

Step	Criteria	Comments and Observations
1	Present the Situation and Its Impact State the situation, impacts, results. Present the situation in a neutral fashion. Use questions to ensure understanding.	
2	Get the Employee's Point of View Ask open questions. Listen and follow up with questions. Restate my understanding of the coachee's perspective.	
3	Get Agreement to the Situation Make sure the coachee understands the situation/issue. Make sure I understand the coachee's view/request. Get agreement before moving forward moving.	
4	Generate Suggestions for Improvement Ask the coachee for suggestions first. Listen actively to suggestions without judging each one. Discuss the pros and cons of each suggestion.	
5	Establish an Action Plan Let the coachee propose an action plan based on the discussion. Make sure I support the coachee in achieving his/her action plan.	
6	Follow Up Set a time and place for follow-up with the coachee. Agree to periodic check-ins and updates	