



ADVANCED COACHING SKILLS



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FOCUS

These modules teach advanced coaching concepts and build on the coaching skills developed by Interns during Skills Development.

TARGET AUDIENCE

These modules are designed for Interns who have spent at least 3 months in the field working with Participants and who have some coaching experience.

RESOURCE

These modules are grounded in the principles presented in the book, Coaching questions: A coach's guide to powerful asking skills, by Tony Stoltzfus. Interns should each receive a copy of the book. While the modules require Interns to refer to specific pages, there are many excellent resources and activities throughout the book. Encourage Interns to review the entire book and refer to it often as it will allow them to develop their skills in the field as they are ready.

You should also review the entire book yourself as there are exercises within it that you may wish to use when coaching Interns in the field.

The author of the book has given permission to use the 10 pages found in this Facilitator Guide only within the context of this Facilitator Guide. They MUST NOT be reproduced in any other form without written permission of the author.

PREPARATION

Before facilitating these modules, ensure you prepare thoroughly by following the preparation instructions at the start of each module and making notes of the key points to ensure you understand the content and activities.

Many of the modules include scripted role plays to demonstrate the impact of correct coaching practices, as well as unscripted scenarios that unfold through the interaction between coach and coachee. Both these learning activities should be rehearsed ahead of time so that they are as authentic and engaging as possible. You aren't required to memorise the script but you should be prepared to act out the role fully. Make sure you understand the learning points the role plays are intended to demonstrate so you are able to clearly bring them out during the role play.

DOT staff facilitators will play the roles within the scripted content.

Intern Coaches will play the Participant role within the unscripted scenarios. During the unscripted, impromptu role plays, Intern Coaches should draw on their knowledge from the field in order to make the Participant role as realistic as possible. Intern Coaches will need to strike a balance between making the outcomes too easy for the Interns to achieve yet allowing the Intern to coach the Participant successfully through the scenario. This should also be rehearsed with feedback from DOT staff.

Where Intern Coaches play the Participant role, there will need to be one Intern Coach available to work with each small group of Interns.

DURATION

The five modules have a total projected time of 6.5 hours

MODULE 1, THE COACHING FUNNEL

TIMING	100 minutes	
PREPARATION	<ul style="list-style-type: none"> <input type="checkbox"/> Read through the module to get a sense of the flow and to gain an understanding of what happens <input type="checkbox"/> Work through the exercises as if you are an Intern to develop examples or samples for explanations <input type="checkbox"/> Read through the module and add notes and your own phrasing and explanations to any complex concepts <input type="checkbox"/> Prepare the Coaching Funnel flip chart <input type="checkbox"/> Prepare the Coach Interns and/or yourself for the role of Marie-Grace, the coachee 	
OUTCOMES	<p>In this session, Interns will:</p> <ul style="list-style-type: none"> • compare and contrast the use of a coaching framework, the Coaching Funnel, to guide coaching sessions • Apply the Coaching Funnel to a coaching session 	
PURPOSE	The purpose of the module is to teach Interns a framework to guide their coaching sessions with Participants.	
MATERIALS	<p>Coaching Funnel flip chart <i>Coaching Questions</i> (pages 30-31 – The Coaching Funnel)</p>	
MODULE SECTIONS	Coaching funnel	15 mins
	Before the funnel	5 mins
	Using the funnel	5 mins
	Identify coaching behaviours in each step	30 mins
	Review your resource	10 mins
	Practice scenario	20 mins
	Debrief	15 mins
MODULE NOTES:		

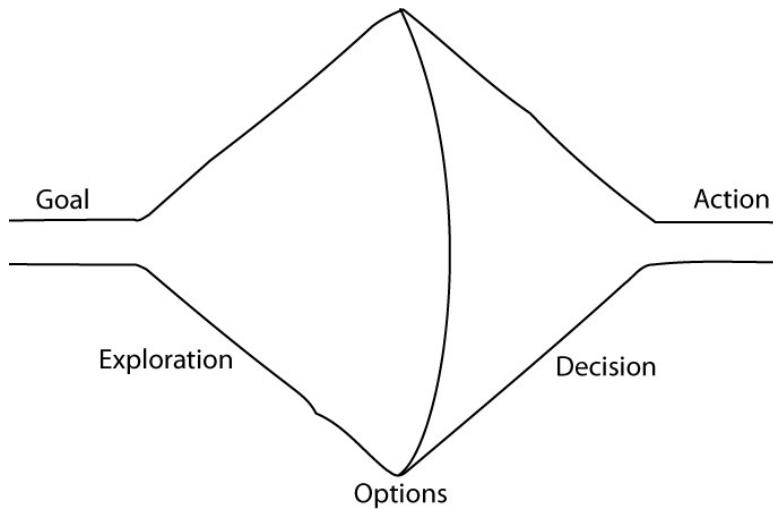
COACHING FUNNEL – 15 MINS

In this module, you'll learn how to use a framework to structure your coaching sessions. This framework will help you move the coachee through a series of steps to arrive at a successful coaching outcome for that session. You'll practise using this framework and working through the steps by doing coaching role plays. At the end of the module you will have some key tools that will help you when you are coaching.

Show the Coaching Funnel flip chart.

It's often helpful to envision a coaching session as a two-ended funnel, like the one shown on this flip chart.

The coaching session begins with a narrow focus. The first step is to identify the goal of the coaching. What does the coachee want to achieve as a result of the coaching? It is important to keep the SMART principles in mind when defining the goal. The coachee needs to be coached towards a specific and manageable goal that will be the focus of the coaching. This will allow something concrete to be accomplished in the short time available and keep you and the coachee focused. So, the coaching session begins by defining a specific goal.



The next step in the coaching session is Exploration. Having determined the goal, the conversation becomes much wider as the coach helps the coachee broaden their thinking and explore the situation. For example, if the goal is to complete three job applications in the next week, it's important to help the coachee explore all of the ideas they have around what is important on a job application, what might have worked in the past, what information and knowledge they have from prior experience that can be used in the new situation, etc. This step is not about rushing to find solutions; it is about exploring the situation and developing a better understanding of the situation, both in terms of how the coachee feels about it and about the situation in general. You can see the funnel widen at this step. This shows the

importance of widening ideas and not narrowing to answers or solutions.

It is from this wide point that the coach helps the coachee come up with Options that will help them progress towards their goal. The Exploration step has already widened their thinking beyond the goal perspective. Now, it's important to develop options from this point of wider thinking so that the coachee doesn't become stuck in what he or she has always done in the past. The coach encourages the coachee to think creatively to develop different solutions. This is the widest point of the funnel.

From this point, the funnel begins to narrow again as the coach helps the coachee decide which actions to take among the list of options. This is the Decision step.

The final narrowing occurs when the coachee commits to a clear SMART choice of Action that he or she will take within an agreed upon timeframe.

Let's look at the difference between a coaching session that uses the funnel process and one that doesn't. We'll start with the session that doesn't use the funnel.

BEFORE THE FUNNEL – 5 MINS

Role play the scenario using the script below.

Geraldo: Good morning, Coach!

Coach: Good morning, Geraldo. How are you today?

Geraldo: I'm fine. Well, I've been better but I'm okay.

Coach: Tell me what's going on, Geraldo.

Geraldo: A lot. My children need school fees, my wife wants to open her own café, and I have applied for two jobs in the past week. I don't know what to do.

Coach: That's a lot, you're right. What do you think about all this?

Geraldo: I don't know what to think.

Coach: Let's talk about them one at a time. Let's start with the first one you mentioned, your children and school fees. What are you planning to do about this?

Geraldo: I don't know. I might be able to borrow a bit of money from my brother for a month or two to help.

Coach: And then what?

Geraldo: I don't know. What should I say to my wife about the café?

Coach: Tell me what you feel about the café.

Geraldo: I'm not sure. She's a really good cook and everyone likes her cooking ...

Coach: And ...

Geraldo: And she might be able to make a café business work but it's a lot to think about right now.

Coach: How can she afford to open a café?

Geraldo: I don't know. We don't have extra money. I told you about having to borrow to pay for the school fees.

Coach: That is a puzzle all right. Okay, let's talk about the final thing you mentioned, applying for two jobs in the last week. What happened?

Geraldo: I went to two places and filled out the forms. One of them asked me to come in for an interview.

Coach: What happened?

Geraldo: I went to the interview but I didn't get the job.

Coach: Why do you think you didn't get the job?

Geraldo: I don't know. (Laughs.) It doesn't seem that I have any answers, does it?

Coach: No, but let's keep talking. Maybe you'll find them through our conversation. Tell me about the job you applied for.

Geraldo: It was a sales position in a furniture store.

Coach: Have you ever had a job like that before?

Geraldo: No.

Coach: I wonder what you wrote on the form that made them interested in interviewing you.

Geraldo: I don't know. Maybe that I sold shoes in the market?

Coach: Were you able to sell many shoes?

Geraldo: Yes, I sold more shoes than anyone else around me.

Coach: Why do you think you were able to do that?

Geraldo: I could tell what kind of shoe the person was interested in from the moment they arrived at my stall. I could show them 4 pairs of shoes that they might like. I always kept a few special styles behind the counter so that they seemed like they were special, that not everyone could get them. They almost always liked one of them enough to buy them.

Coach: Interesting. How were you able to do that?

Geraldo: I don't know. I'll have to think about that.

Coach: Walk me through it. Let's role play. I have just arrived at your stall to buy a pair of shoes.

Explain to the Interns that Geraldo and the coach role play the sale but you aren't going to show that part.

Coach: So, what did you do? How did you sell the shoes so successfully?

Geraldo: Ah! I pay a lot of attention to the clothes the customer is wearing, not only their shoes. If they have on even one unique item of clothing, that tells me a lot about their taste. I then look for shoes that go well with that piece of clothing. That is so interesting, I hadn't thought it through like that before.

I also watch what type of shoes they look at.

Coach: How might you be able to use this skill to sell furniture?

Geraldo: I don't know.

Coach: Why don't you think about that and we'll talk more about it the next time? What about the other issues you brought up? What do you want to do about them?

Geraldo: I'll talk to my brother about borrowing some money for school. Maybe he'll lend me some for my wife's café too.

Coach: Great. Good luck. We'll talk more about all of this the next time.

USING THE FUNNEL – 5 MINS

OK, now we're going to role play the same situation demonstrating the coaching funnel. See if you can tell when we enter each new step.

Present the role play from start to finish without stopping. In the next section, we will go through it one step at a time.

Geraldo: Good morning, Coach!

Coach: Good morning, Geraldo! How are you today?

Geraldo: I'm fine. Well, I've been better but I'm okay.

Coach: Tell me what's going on, Geraldo.

Geraldo: A lot. My children need school fees, my wife wants to open her own café, and I have applied for two jobs in the past week. I don't know what to do.

Coach: That's a lot, you're right. You brought up three different ideas: school fees, your wife's café and the two jobs you applied for. We probably don't have time to work on all three of them today. What would you like to focus on in today's coaching conversation?

Geraldo: I think I'd like to talk about the jobs I applied for.

Coach: What would you like to accomplish in this coaching session?

Geraldo: I'd like to know how to get a job.

Coach: Great. Let's see if we can be more specific. What about getting a job would you like to work on?

Geraldo: I think I'd like to work on doing better in a job interview.

Coach: Very good. Now, let's see if you can put your goal into a single sentence. What do you want to accomplish and by when?

Geraldo: I would like to have strong interview skills so that in two weeks I am ready for a job interview and get the job I interview for.

Coach: Okay. That's very clear.

Coach: Let's begin by exploring your last interview. Tell me about that.

Geraldo: The buses were really slow the day of the interview. I wasn't late but I felt really rushed. It was a new business so I didn't know much about it. Then, when they began asking me questions about my work, I couldn't come up with any examples. They never asked me about my strengths so I didn't get to tell them about some of the things that I can do and am proud of. It

was really hard trying to come up with answers during the interview. I was nervous the entire time.

Coach: Giving a good interview is hard work. You're right about that. Can you think of a time in the past that was like the interview? How did you handle that?

Geraldo: [Thinks.] I suppose that asking my wife's family for her hand in marriage was a sort of interview.

Coach: Laughs. I would certainly say so. Tell me about that.

Geraldo: I practised for days before I approached her father. I thought about what the family might want in a husband for their only daughter. I thought about the kinds of things her father might say to me; the reasons why I might not be the right choice for a husband and I planned how I would answer him.

Coach: What else did you do?

Geraldo: I talked to my future wife and asked her about her family—what they were like, what they might like, what they didn't like.

Coach: Anything else?

Geraldo: I walked by their house several times to see where they lived and how they lived.

Coach: What do you think helped you with this "interview"?

Geraldo: Well, I found out a lot about the family before I talked to them. And, I thought about the kinds of questions that my wife's father might ask me. I thought about how I might answer them. I even practised saying the answers out loud.

Coach: How can you use what worked for you here in other interviews?

Geraldo: I really prepared before I spoke with her father. I found out what was important to them and I practised answering the kinds of questions that her father might ask me.

Coach: So, you did some research and you rehearsed?

Geraldo: Yes. But I knew my wife so she helped me with my "research". How can I research the company I am applying for a job with before the interview?

Coach: That's a great question. What are some ways you could research a company? See if you can come up with five different ways.

Geraldo: Five??!

Coach: Sure. Let's just start with one way.

Geraldo: Well, I could go in and look around as if I was a customer.

Coach: Great! What's another way?

Geraldo: I could see if anyone I know knows anything about the company but I'll have to be careful so that they don't learn about the interview too.

Coach: Okay, another great way. What's another?

Geraldo: I could try to talk to someone who works there to find out what it's like.

Coach: Great. What's another way?

Geraldo: How many is that?

Coach: It's three. Is there a way to learn about the company without talking to someone in that business? Could you talk to a customer?

Geraldo: I can look at businesses that are like theirs; that offer the same products or services.

Coach: Great. That's four. What's one more? What's a crazy idea that you might try?

Geraldo: I could try to write an article for the local paper about the business. Then I would interview the owner.

Coach: Okay. These are some great ideas. Which of these options might provide you the best insight into the company?

Geraldo: I think two of them would give me some ideas that other interviewees wouldn't have: Looking around as if I'm a customer and looking at other businesses that are like the one I'm interested in.

Coach: I think that's enough to work on between now and our next session. Let's create a clear goal for your work between now and the next time we talk. What will you do exactly between now and our next session?

Geraldo: I will go into the business and see what it's like to be a customer. And I will look at other businesses that are their competitors as if I'm also a customer.

Coach: How many other businesses?

Geraldo: Two. I'll look at two other businesses.

Coach: So, turn that into an action statement.

Geraldo: Before our next meeting in two weeks, I will go in and observe what it's like to be a customer of The Fine Furniture Store. I will also observe two competitors.

Coach: That's great. It will give us something good to talk about at our next session. Is there anything else before we end this session?

Geraldo: No, I think that's enough.

Coach: Great. Good luck on your research. I can't wait to hear what you learn.

Geraldo: Thank you.

IDENTIFY COACHING BEHAVIOURS IN EACH STEP – 30 MINS

This time we're going to go through the role play and stop after we complete each step in the coaching funnel.

Begin the role play using the script below. Stop and ask the debrief questions that are presented at the end of each section of the script.

Geraldo: Good morning, Coach!

Coach: Good morning, Geraldo! How are you today?

Geraldo: I'm fine. Well, I've been better but I'm okay.

Coach: Tell me what's going on, Geraldo.

Geraldo: A lot. My children need school fees, my wife wants to open her own café, and I have applied for two jobs in the past week. I don't know what to do.

GOAL

Now, listen to how the coach helped the coachee set a goal for the session.

Coach: That's a lot, you're right. You brought up three different ideas, school fees, your wife's café and the two jobs you applied for. We probably don't have time to work on all three of them today. What would you like to focus on in today's coaching conversation?

Geraldo: I think I'd like to talk about the jobs I applied for.

Coach: What would you like to accomplish in this coaching session?

Geraldo: I'd like to know how to get a job.

Coach: Great. Let's see if we can be more specific. What about getting a job would you like to work on?

Geraldo: I think I'd like to work on doing better in a job interview.

Coach: Very good. Now, let's see if you can put your goal into a single sentence. What do you want to accomplish and by when?

Geraldo: I would like to have strong interview skills so that in two weeks I am ready for a job interview and get the job I interview for.

- ❑ What did you notice the coach doing in this step?
listed the items that Geraldo mentioned
 - *Shared the thought that all three items would be too much to work on in one session*
 - *asked questions that kept narrowing what Geraldo was interested in working on*

- ❑ What questions will you use to help your coachees set goals?

EXPLORATION

Now, listen to how the coach helped the coachee explore the situation and get a better understanding of the issue.

Coach: Let's begin by exploring your last interview. Tell me about that.

Geraldo: The buses were really slow the day of the interview. I wasn't late but I felt really rushed. It was a new business so I didn't know much about it. Then, when they began asking me questions about my work, I couldn't come up with any examples. They never asked me about my strengths so I didn't get to tell them about some of the things that I can do and am proud of. It was really hard trying to come up with answers during the interview. I was nervous the entire time.

Coach: Giving a good interview is hard work. You're right about that. Can you think of a time in the past that was like the interview? How did you handle that?

Geraldo: [Thinks.] I suppose that asking my wife's family for her hand in marriage was a sort of interview.

Coach: [Laughs.] I would certainly say so. Tell me about that.

Geraldo: I practised for days before I approached her father. I thought about what the family might want in a husband for their only daughter. I thought about the kinds of things her father might say to me; the reasons why I might not be the right choice for a husband and I planned how I would answer him.

Coach: What else did you do?

Geraldo: I talked to my future wife and asked her about her family—what they were like, what they might like, what they didn't like.

Coach: Anything else?

Geraldo: I walked by their house several times to see where they lived and how they lived.

Coach: What do you think helped you with this "interview"?

Geraldo: Well, I found out a lot about the family before I talked to them. And, I thought about the kinds of questions that my wife's father might ask me. I thought about how I might answer them. I even practised saying the answers out loud.

Coach: How can you use what worked for you here in other interviews?

Geraldo: I really prepared before I spoke with her father. I found out what was important to them and I practised answering the kinds of questions that her father might ask me.

Coach: So, you did some research and you rehearsed?

Geraldo: Yes. But I knew my wife so she helped me with my "research". How can I research the company I am applying for a job with before the interview?

❓ What did you notice the coach doing in this step?

- *Asked questions to help the coachee figure out a similar situation in which he had been successful in the past*
- *Pulled out the general key practices that the coachee had used in his earlier success.*

❓ What questions will you use to help your coachees explore and learn from their situation?

OPTIONS

Now, listen to how the coach helped the coachee explore options.

Coach: That's a great question. What are some ways you could research a company? See if you can come up with five different ways.

Geraldo: Five?!!

Coach: Sure. Let's just start with one way.

Geraldo: Well, I could go in and look around as if I was a customer.

Coach: Great! What's another way?

Geraldo: I could see if anyone I know knows anything about the company but I'll have to be careful so that they don't learn about the interview too.

Coach: Okay, another great way. What's another?

Geraldo: I could try to talk to someone who works there to find out what it's like.

Coach: Great. What's another way?

Geraldo: How many is that?

Coach: It's three. Is there a way to learn about the company without talking to someone in that business?

Geraldo: I can look at businesses that are like theirs; that offer the same products or services.

Coach: Great. That's four. What's one more? What's a crazy idea that you might try?

Geraldo: I could try to write an article for the local paper about the business. Then I would interview the owner.

❑ What did you notice the coach doing in this step?

- *Kept asking questions and encouraging the coachee to come up with other ideas beyond the first one*

❑ What questions will you use to help your coachees come up with options for moving forward?

DECISION

Now, listen to how the coach helped the coachee decide what option they would take.

Coach: Okay. These are some great ideas. Which of these options might provide you the best insight into the company?

Geraldo: I think two of them would give me some ideas that other interviewees wouldn't have: Looking around as if I'm a customer and looking at other businesses that are like the one I'm interested in.

❓ What did you notice the coach doing in this step?

Gave the coachee some criteria for deciding which options to use

❓ What questions will you use to help your coachees decide among the options they have created?

ACTION

Lastly, listen to how the coach helped the coachee commit to a specific action before the next coaching session.

Coach: I think that's enough to work on between now and our next session. Let's create a clear goal for your work between now and the next time we talk. What will you do exactly between now and our next session?

Geraldo: I will go into the business and see what it's like to be a customer. And I will look at other businesses that are their competitors as if I'm also a customer.

Coach: How many other businesses?

Geraldo: Two. I'll look at two other businesses.

Coach: So, turn that into an action statement.

Geraldo: Before our next meeting in two weeks, I will go in and observe what it's like to be a customer of The Fine Furniture Store. I will also observe two competitors.

Coach: That's great. It will give us something good to talk about at our next session. Is there anything else before we end this session?

Geraldo: No, I think that's enough.

Coach: Great. Good luck on your research. I can't wait to hear what you learn.

Geraldo: Thank you.

- ❑ What did you notice the coach doing in this step?
 - *Asked questions to help the coachee come up with an actionable goal for the next session*

- ❑ What questions will you use to help your coachees take action?

REVIEW YOUR RESOURCE – 10 MINS

Open your book to pages 30 and 31. You'll have 10 minutes to read through the Coaching Funnel.

Once everyone has read this section, you will have the chance to practise what you have learned so far. The Coach Interns and DOT Staff will play the role of a Participant and you will have to coach them through a scenario.

As you read pages 30 to 31, make notes of the kinds of questions that you plan to use. This list will not only help you in this next exercise but it is one you can refer back to when you are coaching Participants in the field. You can always come back to your book too as a review before a coaching session.

OK, you have 10 minutes to read those pages and make notes.

Pages 30-31 are reproduced at the end of this module for your reference.

PRACTICE SCENARIO – 20 MINS

Now that you've had a chance to review the ideas behind the coaching funnel, you're going to get a chance to practise it.

Divide Interns into groups of 5 and assign an Intern Coach or DOT staff member to each group. The Intern Coach/Staff Member will play the role of the coachee, Marie-Grace. They must prepare for the role using

ROLE PLAY NOTES FOR THE INTERN

COACHES/STAFF MEMBERS FOR COACHEE

MARIE-GRACE

Marie-Grace is interested in opening a café but can't figure out how to find the time to start a business. She's a single mother with three children. She's very shy but also very dedicated and a hard-working woman. She wants to provide more for her children and she would eventually like to hire two of her cousins who are also struggling to provide for their families.

The husband of one of her cousins has a small store in a busy community. During market days a lot of people pass by his store. Market days occur once a week. She has friends who sell produce in the market.

She is a very good cook and can make a good meal with very little. One option for a business that she hasn't considered yet is cooking meals at home and delivering them. There may be other options you can come up with.

the role play notes for the coachee, Marie-Grace.

Count off in your group from 1 to 5. Each of you will get a chance to practise one step in the funnel. Whoever has the number 1, will begin by helping the coachee set a clear goal for the coaching session.

Once you have reached the objective for this first step, the coaching passes on to the next person in your group. Number two will then help the coachee explore the situation and so on, in order. That means that you will be responsible not only for guiding your coachee through the step you are responsible for but also for knowing when that step has been accomplished.

The Intern Coach or DOT staff member in your group will play the role of the coachee for each group.

Coaches, your objective is to work through the entire coaching funnel with your coachee, Marie-Grace. Marie-Grace is interested in opening a café but can't figure out how to find the resources to start her business. You will need to get her to agree on a coaching goal, explore the details of her situation, help her come up with options to proceed, decide on an option, and agree on an action step to complete before the next coaching session.

Any questions before you begin? You will have 20 minutes to coach Marie-Grace through this process.

DEBRIEF – 15 MINS

- ❑ What did you notice as you worked through the coaching funnel?
- ❑ What was the difference between your experience using the coaching funnel in this practice scenario and the last coaching session you did with a Participant?
- ❑ Were some steps of the process harder than others? What made them harder?
- ❑ How can the coaching funnel change your coaching practice?

Application

Use this model to coach practical challenges or issues that require exploration and self-discovery.

Hints & Tips

The “Listening for Significance” technique works perfectly for the *Exploration* step. Just listen for the most important thing the client says, repeat that word or phrase back verbatim, then ask for more information on it. For example:

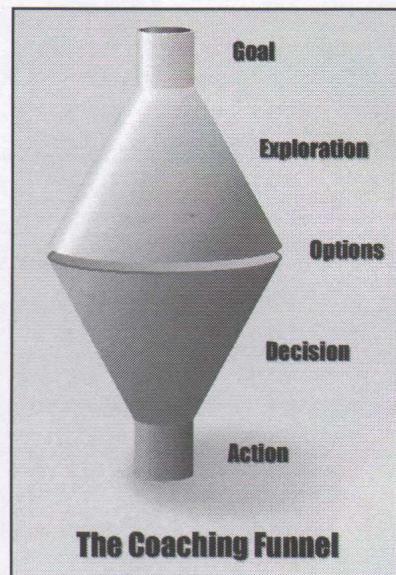
“You mentioned that you didn’t want to ‘crush’ your assistant by giving this feedback. Can you say more about that?”

The Coaching Funnel

The Coaching Funnel is a visual model of a coaching conversation which allows ample time on the front end to explore the situation before generating options and actions. It starts with a narrowly focused goal: what is the person’s ultimate objective? Then the coach widens the conversation with open questions that allow the person to more fully explore what’s going on in the situation, both internally and externally. Getting more information out on the table helps the client generate potential solutions to the problem. Then the conversation begins to narrow again. The client evaluates these options and decides on a course of action. The coaching interaction concludes when the client chooses specific steps of action to move toward the goal.

Step 1: Goal

The goal is a one-sentence statement of the objective the client wants to reach by a particular date. The S.M.A.R.T. format (pg. 37) is a useful tool for developing effective goal statements. Asking the client to state their objective in one short sentence is valuable: you can return repeatedly to a clear, succinct statement keeps you focused on the objective.



Goal Questions

- *“What do you want to accomplish through this coaching relationship?”*
- *“Be specific: what will be different when you’ve reached this goal?”*
- *“Can you think of a way to quantify that so we can measure your progress?”*
- *“In a month or three months or a year—whatever time frame you want to work in—what change do you want to have made?”*
- *“How can we state your objective so it depends only on what you do, and not on the choices or actions of others?”*
- *“Now take that and state it in one short sentence: what do you want to accomplish, by when?”*

Step 2: Exploration

Once a goal is set, it’s time to fully explore the situation, what led up to it, and what is going on under the surface. Exploration can involve probing both the external situation and the client’s internal responses to what is happening (see Probing Questions, pg. 41-43).

Exploration Questions

- *“Tell me more.”*
- *“You mentioned that _____. Can you say more about that?”*
- *“Give me some background: what led up to your being in this situation?”*
- *“You mentioned that you always feel _____. Give me a specific example of a time that happened, including the details of what was said and done.”*
- *“What’s behind that?”*
- *“What are the most important factors or players in this situation?”*
- *“It sounds like _____ is really important to you. Can you explain?”*

Step 3: Options

In this step, the coaching process pushes the client to think creatively to develop multiple potential solutions. Often the first several ideas are ones that the person has already considered; the process becomes genuinely powerful when clients get creative and think beyond the boxes they are stuck in.

Option Questions

- “What could you do here to move yourself toward your goal?”
- “What other options can you think of?”
- “Let’s shoot for at least five potential solutions. What else could you do?”
- “You mentioned earlier that _____. Does that suggest any other ways you could approach this?”
- “What obstacles might keep you from reaching your goal? How could you remove them?”
- “What have you done in similar situations in the past?”

Hints & Tips

Details shared in the exploration step often suggest potential solutions. Returning to key things you noted during exploration can help the client generate additional options.

Step 4: Decision

Next, help your clients make a decisive choice to pursue a certain course of action that leads toward their goal. A useful framework is “Could Do>Want to>Will Do” covered on page 44. Options are what coachees “Could Do”. Next, ask for a decision on which potential solution they “Want To” pursue, then close the deal by requesting a commitment to what they “Will Do” to put their choice into action.

Decision Questions

- “The options you mentioned are [read back through the list of options the client has generated]. What stands out to you in that list?”
- “Which options do you want to pursue?”
- “Which of these options will most effectively move you toward your goal?”
- “Make a choice: what’s the best solution?”

Hints & Tips

The solution the client believes in and wants to act on is usually the best option (even if you think you know a better one), simply because it will be acted on while other options will not.

Step 5: Action

Now we’ll turn the course of action the client has chosen into concrete steps with high buy-in. Clearly verbalizing what will be done creates both commitment and accountability.

Action Step Questions

- “Let’s turn that into an action step: what exactly will you do?”
- “What will you do by when?”
- “You mentioned that you (could, should, might, ought to) do _____. Would you like to make that into an action step?”
- “You mentioned that you could do _____. What will you commit to doing?”
- “Is that a realistic timetable? Are there any other obstacles we need to address before you move forward with this step?”



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The book *Leadership Coaching* by Tony Stoltzfus describes the Coaching Funnel in detail.

MODULE 2, EXPLORATION AND PROBING

TIMING	100 minutes	
PREPARATION	<input type="checkbox"/> Read through the module to get a sense of the flow and to gain an understanding of what happens <input type="checkbox"/> Work through the exercises as if you are an Intern to develop examples or samples for explanations <input type="checkbox"/> Read through the module and add notes and your own phrasing and explanations to any complex concepts	
OUTCOMES	In this session, Interns will: <ul style="list-style-type: none"> Ask probing questions to explore a coaching issue 	
PURPOSE	The purpose of this module is to develop questioning skills that will allow Interns to probe into a situation and develop a full understanding of a coachee's situation before trying to problem-solve and find solutions.	
MATERIALS	<i>Coaching Questions</i> (pages 38-40 – Probing Questions) Carolita and the Failed Restaurant worksheet	
MODULE SECTIONS	Introduction	2 mins
	Carolita and the failed restaurant	5 mins
	Rewrite the coaching script	60 mins
	Apply to your own scenario	20 mins
	Debrief	10 mins
MODULE NOTES:		

INTRODUCTION – 2 MINS

In the next modules we're going to look at each step of the Coaching Funnel in greater detail. In this module, we'll look at the Exploration step. You'll do that in the small groups that you're already in.

During Exploration, your role as a coach is to fully explore the situation that the coachee is bringing to you. You do that through probing questions.

We'll begin this session with a before and after role play. We'll start with the before session, where the coach doesn't probe or explore effectively. You'll then rewrite the script for the after role play.

CAROLITA AND THE FAILED RESTAURANT – 5 MINS

Role play the following scenario in front of the large group.

Coach: Good morning, Carolita. How are you today?

Carolita: Good morning, Coach. I am not well.

Coach: Tell me about that.

Carolita: My restaurant failed this week.

Coach: I'm so sorry. What would you like to do about that?

Carolita: I'd like to start a new business.

Coach: Okay, what business would you like to start?

Carolita: I think I'd like to sell shoes in the marketplace. I see many people selling shoes. They seem to be making money.

Coach: How can you start this business?

Carolita: I need to get some shoes to sell and a market stall.

Coach: How will you do that?

Carolita: I need money to start.

Coach: Where will you get the money?

Carolita: I will get a loan from my cousin.

Coach: Okay. Is that what you are planning to work on between now and our next session?

Carolita: Yes, I will come back and tell you how it goes.

Coach: Okay, great. Good luck. I will look forward to hearing about your new business.

NEXT SESSION

Coach: Good morning, Carolita. How are you today?

Carolita: Good morning, Coach. I am not well.

Coach: Oh dear. What happened?

Carolita: This business failed just like the restaurant.

Coach: Why did it fail?

Carolita: My husband used the money I made to pay some of his bills, just like the last time. Even though I made money at first, I didn't have money to put back into the business to buy more shoes.

REWRITE THE COACHING SCRIPT – 60 MINS

REVIEW PAGES 38-40 – 15 MINS

Turn to page 38 in your book. You'll now have 10 minutes to read pages 38-40 in the *Coaching Questions* book.

Call the group back to attention after about 8-9 minutes and ask:

❑ What stood out for you from these pages?

Gather a few responses. If no one offers that you should spend at least 5 minutes listening and probing before examining options, bring it up. It's in the top grey box on page 39.

❑ Why does the author suggest that you spend at least 5 minutes listening and probing before moving on to finding solutions?

We are so geared towards solving problems that we tend to go into problem-solving mode immediately and may not fully understand the problem. Probing ensures that we are considering the RIGHT problem before we try to find a solution.

REVISE THE SCRIPT AT 5 KEY TURNING POINTS – 30 MINS

Now in your groups, you'll have a chance to help Carolita's coach help Carolita explore the situation further. You'll do that by looking at 5 key turning points in the script, where the coach

could have helped Carolita explore the situation a bit more before moving on.

Hand out the Carolita and the Failed Restaurant worksheet.

The worksheet outlines these 5 key points in the boxes on the right. On the left are a series of questions. You will have 30 minutes to discuss these questions in your group and come up with the best answers to the questions. At the end of 30 minutes, you will then role play this scenario in your group using the new questions you have developed. Based on the questions the new coach asks, the role play could take a very different path.

What questions can the coach ask that will guide the coachee to discovery? You may use your *Coaching Questions* book as you work.

ROLE PLAY THE NEW SCRIPT – 15 MINS

Using the questions you just developed, you now have 15 minutes in your group to replay Carolita's scenario. The Coach Intern/DOT staff member will play the role of Carolita. Each of you should take turns to ask questions in the role of the coach. Make sure that you ask probing questions to really make sure you understand Carolita's situation before trying to help her find solutions.

APPLY TO YOUR OWN SCENARIO – 20 MINS

You will now work in pairs to apply what you have learned about exploration and probing questions to a coaching scenario you experienced in the past. One person will play the coach, the other the coachee. Then you will switch roles and repeat the process.

Take 1-2 minutes to think of a recent coaching session you had with a Participant where you weren't sure what the Participant was asking of you, one where the problem wasn't clear. You will then use this memory to play the role of the coachee. Your partner will play the role of the coach and coach you through the exploration process by asking probing questions.

You will have 10 minutes. At the end of 10 minutes, you will switch roles.

❓ Are there any questions before we get started?

Find a partner and choose who will go first.

Call time at the end of 10 minutes and have Interns switch roles.

DEBRIEF – 10 MINS

- ❑ What was the difference between your experience of this replayed session and the actual coaching session you experienced?
- ❑ Which question seemed to be the most helpful in gaining a greater understanding, either as a coach or a coachee?
- ❑ How can role playing help you in your coaching?
- ❑ What will you do differently in your next coaching sessions?
- ❑ What specific questions are you adding to your coaching tools?

Probing Questions



Tools for asking exploratory questions that help the client think more deeply about a situation.

Probing questions are used in the initial stages of a coaching conversation to explore the client's situation. Probing gets more information out on the table and forces the coachee to really examine what is going on. Many times, just the act of exploring and thinking things through in a structured way will bring the solution, without even looking at options.

Open questions are the key to effective exploration. They can be defined in two ways:

- A question that can't be answered with a simple "yes" or "no"
- A question that lets the coachee answer in many different ways and thereby direct the conversation to what's most important

Broad Questions

The second definition is of most interest to coaches. Coaches use many wide open questions because we want to be led by the coachee's sense of what is important, not our own. A "Broad" question that can be answered in many different ways lets the coachee take you to what is most significant. It's a little counter-intuitive if you are used to being led by your own insights, but asking broad questions is a very efficient way to move the conversation onto the key agenda.

So what do broad questions look like? For instance, take the example of coaching someone through a disagreement at work. Which of the following two queries is broadest?

- *"What did you say in reply?"*
- *"How did you respond?"*

The second option is better (unless you specifically want to know what was said), because it allows for many more types of responses. It may be that the person voiced a "nice" reply, but then sulked for a week, or updated his resume, or coldly plotted how to get revenge. Or it could be that he said nothing, but chose to respond with an act of kindness or loyalty. The point is, *the most significant response may not have been in words*. Because the first question limits the answers to what was said, it may prevent the client from telling you what's really important. We tend to ask narrow questions like this one when we ask with a solution already in mind.

Exercise: Broaden Your Questions

To make a question broader, redesign it to allow for a wider range of answers. Here's an example, plus four more narrow questions for you to practice broadening:

1. *"Describe that feeling of disappointment."* (Narrow)
"Describe that feeling." (Broader: allows for many different emotions)
"Describe what was going on in you." (Even broader: allows for emotions plus physical, rational or other types of responses)
2. *"Who could you ask to find the answer?"*
3. *"Which of these two subjects would you like to focus on?"*
4. *"What's the most significant thing that happened to you today?"*
5. *"How is what's going on at home connected to your stress at work?"*

Playing the Angles

Another important probing skill is looking at a situation from multiple angles. Pursuing different sources of information (like the Past, Others' Viewpoints, or Emotion) brings new insights and opens up additional solutions when you get to the "options" stage of the conversation. Here are several different angles you might choose to explore, with sample questions for each:

The Past

- "What led up to this?"
- "Give me some background: how did you arrive at this place?"
- "What else fed into this?"

The Future

- "Where do you see this going?"
- "How do you want things to turn out? What's the best possible outcome?"
- "What's the dream or the compelling future that calls you on here?"

Patterns

- "Have you been in a place like this before? Describe what happened."
- "How have similar situations in the past affected you? How have you responded to them?"
- "Do you see any patterns here in your life or your responses?"

Emotions

- "What is going on inside you during this change?"
- "How do you feel about that?"
- "Describe the emotions this situation brings to the surface in you."

Others' Viewpoints

- "How do you think your [boss, spouse, peers, etc.] see this?"
- "What does this look like from the other person's point of view?"
- "If you were _____, what would things look like from that person's perspective?"

The Concrete

- "Give me a specific example of that."
- "What exactly did you say? What did she say?"
- "OK—so run through that from square one. Exactly what happened?"

Values and Principles

- "What values do you hold that will influence your responses to this?"
- "What principles [business, ethical, spiritual, etc.] apply to this situation?"
- "What would it mean to be true to your beliefs and principles in this situation?"

The Heart of the Matter

- "What are the real issues here?"
- "What makes this significant to you?"
- "It seems like this is something important to you—talk about that a little."

Hints & Tips

During coach training, many prospective coaches find that their previous pattern has been to quickly enter into problem-solving mode—often within 60 seconds of beginning a conversation. A wonderful discipline when you're learning to coach is to commit to probe and listen for at least five minutes before you even begin examining solutions. You'll be surprised at how much more effectively you coach!



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Probing (cont'd)

Short and Sweet

Sometimes the best question is the simplest. Here are some very simple queries that are used repeatedly in coaching situations. If you can't think of what to ask, fall back on one of these basic coaching questions.

- “Say more about that.”
- “Keep going.”
- “Tell me more.”
- “What else?”
- “And?”
- “What's behind that?”
- “You mentioned that _____ [Insert a phrase that caught your attention]. Tell me more about that.” (The Observation and Question technique.)

Twelve General Probing Questions

Here are twelve questions you'll use over and over as you coach:

1. “What would you like to talk about today?”
2. “What else is important to this discussion?”
3. “What feelings do you have about this?”
4. “Who are the other players in this? How are they involved?”
5. “What do you want? What's the objective here?”
6. “What do you gain from this? What do you give to it?”
7. “Give me a concrete example of that.”
8. “What did you mean when you said _____?”
9. “What was most significant to you about that situation?”
10. “Give me some background: what led up to this situation?”
11. “What excites you about this? What holds you back?”
12. “What is your heart saying?”



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Observation and Question Exercise

Here's an exercise to help you become comfortable with simple questions and break out of the need to ask the perfect question. We're going to do a whole ten-minute exploratory conversation using just the observation and question technique (the last item under “Short and Sweet” above). Once the conversation gets started, simply listen for the most significant or interesting thing the person says, repeat that phrase back, and ask, “Tell me more about that.” It's amazing how deep you can go if you get yourself out of the way, listen intently and keep asking a simple probing question!

CAROLITA AND THE FAILED RESTAURANT WORKSHEET

TURNING POINT 1

- ?
- How could the coach have explored this point more?

- ?
- What questions could the coach have asked to help Carolita learn from this experience so that she wouldn't repeat the mistake?

Coach: Good morning, Carolita.
How are you today?

Carolita: Good morning, Coach. I am not well.

Coach: Tell me about that.

Carolita: My restaurant failed this week.

TURNING POINT 2

Let's assume that Carolita started a restaurant because she had passions and skills that related to the restaurant business and the business was attractive to the market.

- ?
- What questions could the coach have asked to help Carolita explore these same conditions re: her shoe selling business?

Carolita: I'd like to start a new business.

Coach: Okay, what business would you like to start?

Carolita: I'd like to sell shoes in the marketplace.

TURNING POINT 3

- ?
- What questions could the coach have asked to help Carolita explore what she would need to know to sell shoes in the market (such as how she will compete, how will she find customers, why customers will choose to buy from her rather than from the other shoe sellers in the market)?

Coach: How can you start this business?

TURNING POINT 4

- ?
- How could the coach have helped Carolita explore the assumption that she needed money in order to start a business?

Carolita: I need money to start.

CAROLITA AND THE FAILED RESTAURANT WORKSHEET

POINT 5

- ? How could the coach have helped Carolita explore the value and the cost of a loan, as well as other sources of money that might be available to her?

Coach: How can you get that money?

Carolita: I will get a loan from my cousin.

MODULE 3, IDENTIFYING OPTIONS

TIMING	70 minutes	
PREPARATION	<input type="checkbox"/> Read through the module to get a sense of the flow and to gain an understanding of what happens <input type="checkbox"/> Work through the exercises as if you are an Intern to develop examples or samples for explanations <input type="checkbox"/> Read through the module and add notes and your own phrasing and explanations to any complex concepts	
OUTCOMES	In this session, Interns will: <ul style="list-style-type: none"> • Practice three techniques for generating options when coaching 	
PURPOSE	The purpose of this module is to provide Interns with coaching tools that will help them coach Participants to identify a variety of potential solutions to their problems.	
MATERIALS	<i>Coaching Questions</i> (pages 41-43 – Options)	
MODULE SECTIONS	Identify the problem	5 mins
	Help Eric identify obstacles and options	40 mins
	Peer practice	15 mins
	Debrief	10 mins
MODULE NOTES:		

IDENTIFY THE PROBLEM – 5 MINS

In this module, we're going to work on the Options step of the Coaching Funnel. The Options step allows the coachee to generate potential solutions. However, we'll start with a role play that will help us identify the specific problem that needs to be addressed.

We'll begin by doing a brief role play to set up the situation. Then, I'll ask for two volunteers to continue the role play to explore and identify the problem that needs to be addressed.

Perform this brief role play with another facilitator to introduce the situation.

Eric: Good morning, Coach.

Coach: Good morning, Eric. How are you today?

Eric: I have a problem and I need your help.

Coach: That's what I'm here for. What is the problem?

Eric: I keep applying for jobs but no one will hire me.

Coach: So, what specifically would you like to work on?

Eric: I'd like you to help me get a job.

Coach: Tell me more about that.

Eric: I look and look but can't find anyone who will hire me.

Coach: That does sound like a problem. I wonder why you can't find someone to hire you. Have you considered starting your own business instead?

Eric: I don't want to start a business. I want a job.

DEBRIEF

❓ What is the problem that Eric is looking to solve?

You will probably get answers like: he can't get a job, no one will hire him. However, neither of these answers reveal a specific problem that is under Eric's control and that he can work on to improve his chances of getting a job. There might be many reasons why he is not being hired and we don't know what these are. Does he have poor interview skills? Is he applying for jobs that don't match his skill set? Does he not have a well laid out CV? Does he have a problem with time management and doesn't arrive to interviews on time? As you gather answers from the group, keep asking questions to demonstrate that we don't really know what

the problem is that Eric can work on. It is only when you really understand the true underlying problem that you can look for options to address this problem.

HELP ERIC IDENTIFY OBSTACLES AND OPTIONS – 40 MINS

WHAT TO ADDRESS: IDENTIFY THE PROBLEM – 10 MINS

I'd like two volunteers to role play a coaching session to help Eric determine why he is not being hired.

One person will play the role of Eric and the other will play the role of the coach. If either person gets stuck in the role play, they may ask for help from the rest of the group or invite someone to take over their role.

May I have two volunteers to begin?

Ask for two volunteers to come up and role play in front of the group.

Coach, use probing questions to help Eric figure out why he is not being hired.

If either of you get stuck during the role play, you can ask for help from the rest of the group.

As soon as the pair uncovers a specific problem that is within Eric's control, stop the role play. Thank all of the performers for their work.

HOW TO ADDRESS: COME UP WITH OPTIONS – 15 MINS

Eric and his coach have identified a problem or obstacle that needs to be addressed if Eric is going to get hired. Unless Eric is able to address the obstacle or problem, he will not be able to move forward with his goal.

You are now going to work in small groups to coach Eric to develop options and come up with potential solutions to his problem. You will use pages 41-42 of your *Coaching Questions* book to guide you in the process.

Divide the Interns into groups of 4-5 and give each group a number from 1-3.

- The 1s will use the Five Options Technique, at the top of page 41.
- The 2s will use the Obstacle Approach, at the bottom of page 41

- The 3s will use the Ideal Future Technique, at the top of page 42.

Take 2-3 minutes to read through the technique you have been assigned. Then in your group, discuss how to help Eric identify options using your technique. You'll have about 10 minutes to plan what you might do to coach Eric. At the end of 10 minutes, we'll come back together and role play each technique. You will need one person in your group to play the coach and another to play Eric. Decide who will play which role before the end of the 10 minutes. You will begin your role play from where we left off our earlier role play—the identification of the problem.

Now, you have 10 minutes to read about your technique and think about how you will apply it to Eric's situation.

Call time at the end of 10 minutes.

ROLE PLAY OPTION COACHING – 15 MINS

Ask for a pair to volunteer to role play the use of their technique. Allow about 5 minutes for each role play: Five Options Technique, Obstacle Approach, and Ideal Future Technique. Ensure that one group role plays each technique first. Then, if you have additional time, you may have other groups role play a technique a second time.

PEER PRACTICE – 15 MINS

Now, you're going to have a chance to coach each other to identify options that you can use to move beyond an obstacle that you face. You can use any of the three techniques that we have covered here.

Find a partner. Take 1-2 minutes to think about an obstacle that you currently face. Once you have an obstacle in mind, signal to your partner that you are ready to begin. Choose who will be the first coachee. I will call time at the end of 5 minutes and you will switch roles.

Call time at the end of 7 minutes and have Interns switch roles.

Call time at the end of 15 minutes and end the session.

DEBRIEF – 10 MINS

There are two additional option generating techniques on pages 42 and 43 that you can learn as you become more comfortable coaching your coachees towards options.

- ❑ What did you learn when you role played or watched any of the option techniques?
- ❑ What about identifying options seemed hard to do? How can you work around that issue?
- ❑ What will you do differently now when you coach your Participants?

Options

Generating options by asking the coachee to think instead of offering advice or solutions is one of the most important coaching skills. Below are five techniques for developing options.

The Five Options Technique

When we are mulling over a challenge we face on our own, we tend to stop thinking creatively after two or three options. If those options don't look very attractive, we get stuck. The Five Options Technique gets people unstuck by pushing them beyond that initial set of options and back into the creative zone. Simply ask for at least five potential solutions to the problem, and keep asking until you get five.

- “Give me five options for how you could tackle this challenge.”
- “Give me another option.”
- “What else could you do?”
- “If you got really radical, what would you try?”
- “OK. The options you mentioned so far are [list them]. Which of these would you like to pursue?”

Make sure the clients are doing the work! Your job is to push them to think things farther through than they have before, not to do the thinking for them. If the coachee runs out of new ideas, begin asking more specific questions using the clues in what they've said:

- “What have you done in the past in similar situations?”
- “You mentioned talking with your spouse as an option. Who else could you bring into this?”
- “How could you kill two birds with one stone here, or fit this into what you are already doing?”
- “All the options you mentioned involve you doing this by yourself. If you thought outside that box, what else could you do?”

Obstacle Approach

This approach starts with the barriers the client has run up against. Identify what's standing in the way of achieving the goal, and develop options to move around it.

- “What is stopping you from reaching that objective?”
- “What do you need that you don't have to reach this goal?”
- “You've mentioned money several times as an obstacle. If you had all the money you needed, then what would you do?”
- “I've heard you say twice that you don't have time to take this on. Let's look at that obstacle: give me five options for how you could find the time.” [See the Five Options Technique above.]
- “How could you change your objectives or timetable to make this goal achievable?”
- “What resources could you tap into to overcome this obstacle?”
- “Who do you know that could help you with this?”
- “How have you overcome obstacles like this in similar situations in the past?”



These asking tools provide a variety of ways to help the coachee develop creative solutions—a vital step in the coaching process.



Sometimes after all this the person will go back and choose the very first option they voiced. That's not a failure! The value of going through the whole process is now they really believe it's the best option, and so it is more likely to get done.



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Options (cont'd)

Ideal Future Technique



Visualization is the key to the Ideal Future Technique. You want the client to create a visual picture of the desired future (with specific details, sights and sounds they can reach out and taste and touch) so that the person can enter into and experience their ideal.

This technique asks the client to conceptualize their ideal future or the best possible outcome, and then work backward to the present. When we start in the present we often get stuck, because all we see are obstacles like time and money. Going to the future and working directly with the dream takes us out of this trap. By visualizing and experiencing our desired future, we often also gain the motivation needed to overcome the obstacles to reaching it.

Step 1: Identify a Goal or dream

- *"Where would you like to be with this in three to six months?"*
- *"What is the best possible outcome you can envision?"*
- *"Would you like to explore this dream and see if it is a real possibility?"*

Step 2: Go to the End. Take the person to a point in the future when the goal has come to pass

- *"Imagine that it is 90 days (or six months, or a year) in the future, and you've achieved this goal. Take me there and tell me about it."*
- *"Let's say you pursue this dream and you reach it—it becomes a reality. Take me to that point in the future and describe what it looks like to have reached this dream."*
- *"If you pursued this dream (or this solution or this decision), what would your life look like in 30 days (or 90 days or a year or five years)?"*

Step 3: Visualize the Ideal. Ask the person to picture their ideal future in detail!

- *"Imagine you are in that future right now. Envision it in specific detail! What do you see and feel?"*
- *"Visualize your typical day in this new future. What will your surroundings be like? Your schedule? Your team? The work you are doing? What are you enjoying?"*
- *"Be more specific. What kind of setting are you in? Where are you sitting? Who are you meeting with? What are you talking about?"*
- *"What does it mean to you to reach this goal? What difference does it make?"*
- *"Paint me a picture: what emotions would you experience if you reached this goal?"*

Step 4: Work Backward to the present to develop a solution

- *"Where is your motivation to pursue this goal now, versus half an hour ago?"*
- *"What difference does that make as you consider the obstacles to reaching this goal?"*
- *"What one step could you take now to start moving toward your ideal future?"*

Transformational Approach

Sometimes the best solution comes through transforming who you are (your attitudes, expectations, or responses) instead of changing your outward circumstances. These questions explore the possibility of inward transformation to bring about outward change:

- *"What could change about you that would change your situation?"*
- *"Let's assume for a minute that this situation is custom designed for your inner growth as a leader and a person. If that's true, what's the opportunity here?"*

- “When we face great adversity, we are either broken by it, survive it, or it becomes a defining moment. What response would make this a defining moment for you?”
- “What fears, doubts or other internal obstacles are keeping you from moving forward? What would it take for those obstacles to be completely gone?”
- “Imagine that at age 75 you are telling your life story to a grandchild. What would you like to be able to tell him/her about how you responded to this challenge?”
- “If you were the best you can be, operating at your full potential, the person you’ve always wanted to become—then what would you do?”
- “If this situation wasn’t random adversity, but a gift from God, what then?”

Thinking Outside the Box

Sometimes coachees get stuck inside a box—all their potential solutions fall within certain unrecognized boundaries. For instance, the person may only look at options they think will fit in their busy schedule or limited budget, or they may unconsciously believe they can’t be happy unless some *other* person changes. When you see a coachee functioning inside a box, name the box, then help them explore what might happen if they went outside it. A box might be:

The other person must change for things to get better:

- “Envision yourself as a change agent here—that your response makes a real difference. If you saw yourself as powerful instead of powerless, what would you do?”
- “Just for the sake of argument, let’s say the other person never changes. Can you live with that? Then what could you do to make things better?”

The resources I have now are the only ones available:

- “Get creative: what other resources could you tap into?”
- “The solutions I’ve heard so far are limited by the resources you have now. What could you do to broaden the resources you could throw at this?”

There is some external circumstance I’m stuck with and can’t change:

- “I’m noticing that all your options assume you have to stay in this [job, home, relationship, role, schedule, etc]. Can I challenge that? What if you made a more fundamental change?”
- “What if your schedule or budget wasn’t a given? If you had more time and money, what other options would you have?”

There is something about myself that I can’t change:

- “What would you do if you really believed in yourself and knew you couldn’t fail?”
- “It seems like you are assuming that _____ can’t change. Is that really true?”

There is a belief or principle that I hold to that can’t change:

- “What belief or principle are you functioning out of here? Is that belief serving you well or hindering you? What do you want to do about that?”
- “Your options seem to be shaped by a belief that _____. Does that belief work here? Could reevaluating or adjusting it lead to some better options?”



Hints & Tips

One way to identify a box is that solutions occur to you that don’t occur to the coachee. Instead of just telling them your ideas, it may be much more powerful to help them think about why that idea wasn’t occurring to them. When you figure out how this idea breaks the box, the coachee may immediately think of several more answers.



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MODULE 4, DECISION-MAKING

TIMING	40 minutes	
PREPARATION	<input type="checkbox"/> Read through the module to get a sense of the flow and to gain an understanding of what happens <input type="checkbox"/> Work through the exercises as if you are an Intern to develop examples or samples for explanations <input type="checkbox"/> Read through the module and add notes and your own phrasing and explanations to any complex concepts	
OUTCOMES	In this session, Interns will: <ul style="list-style-type: none"> • Identify their preferred decision-making style • Coach each other to make decisions using different decision-making strategies 	
PURPOSE	The purpose of this module is to introduce Interns to different decision-making styles. People are often not aware of the strategies they use to make decisions or of other strategies they could use. Interns can become more effective coaches by helping coachees recognise the strategies they use and are most comfortable with, as well as other new ways of arriving at a decision.	
MATERIALS	<i>Coaching Questions</i> (pages 70-71 – Decision Making)	
MODULE SECTIONS	Share your story Debrief	30 mins 10 mins
MODULE NOTES:		

SHARE YOUR STORY – 30 MINS

In this module, you will be working with a partner again.

Find a partner and think about a big decision that you have recently had to make. Once you have identified a decision, think about how you arrived at that decision. On your own, write down the key things that led you to that decision. You have 3 minutes to do this.

Allow Interns to find a partner and then give them a few minutes to identify a decision and take notes on how they arrived at it.

Turn to page 70 in your *Coaching Questions* book. Look at the Thirteen Decision-Making Strategies and identify which you used to arrive at your decision. Write these down.

Give Interns a few minutes to complete this exercise.

You have just identified your preferred decision-making strategies. Take a few minutes to share these with your partner and identify similarities and differences between your decision-making styles.

Give Interns a couple of minutes to discuss their preferred strategies with their partner.

Now, think about an upcoming decision you have to make. You will then coach your partner to come to a decision about this issue using a strategy that they don't normally use.

Once you have a decision in mind signal to your partner that you are ready.

Each person will have about 10 minutes to be the coach and 10 minutes to be the coachee.

Decide who will talk about their decision first and begin.

Call time at the end of 10 minutes and have Interns switch roles.

DEBRIEF – 10 MINS

- ❓ What stood out for you in this last activity?
- ❓ What can you do with what you learned from this session?
- ❓ How will your coaching change as a result of this module?

Application

Asking tools for helping people look at decisions from multiple angles.

Exercise: Decision Making Strategies

Get together with a peer coach or friend who faces a major decision. First, explore how they've thought through things to this point. Can you help them identify their preferred decision-making strategy?

Then walk the person through at least three more of the strategies at right. What did you both learn by trying some new approaches and looking at the decision from different angles?

Decision Making

Developing the ability to make great decisions is a key part of living a purposeful life. Here are some questions for exploring the client's process for making decisions.

- *"How will you make that decision?"*
- *"What factors will make the most difference to you?"*
- *"What do you need to know to make a great decision?"*
- *"What would a great decision look like?"*
- *"How do you usually make decisions?"*
- *"What other decision strategies could you use? Which methods do you want to try?"*

Thirteen Decision-Making Strategies

Sometimes people are unaware of the decision-making process they are using, or of what other strategies are available. This list contains 13 common decision-making styles. Use it to help the client identify the strategies that are most comfortable and familiar, and what new strategies could be explored. Running a major decision through several strategies can be very revealing.

1. **Rational:** *"What are the pros and cons of pursuing each option? Which is most advantageous?"*
2. **Intuitive:** *"What is your gut saying? What feels right to you?"*
3. **Relational:** *"How will this course of action affect the people around you? Who will benefit, who will be hurt?"*
4. **Principled:** *"How do the key principles and priorities you live by apply here?"*
5. **Alignment:** *"How well does this decision align with your passions, your values, and your calling?"*
6. **Decisive:** *"What approach would most quickly lead you to a decision here?"*
7. **Adaptive:** *"What decisions could be left open to allow for new information or options? What things must be decided now that cannot be put off for later?"*
8. **Counsel:** *"What does your spouse think? How about some key friends or advisors?"*
9. **Team:** *"What do your team members think? What would happen if you decided as a team?"*
10. **Spiritual:** *"What decision would best align with your faith? What is God saying to you on this?"*
11. **Negative Drives:** *"What fears or inner drives are influencing your response? How could you remove those things from the equation so you can make a better decision?"*
12. **Cost:** *"What would it cost in terms of time and resources to do this? What would it cost you if you don't do this? What's the cost if you don't decide or let circumstances overtake you?"*
13. **Risk/Reward:** *"What is the payoff for each option? The risk? Can you live with the worst-case outcome? What steps could minimize the risk if you went with this?"*

Perspectives

One of the strengths of team decision-making is that you hear different perspectives on the problem from people with different personalities or positions. Decisions taken alone tend to see things from only one point of view. One very effective coaching technique is to walk the individual through several different viewpoints as they approach the decision:

- You are a high 'T' on the DiSC inventory. What would a high 'D' do here? How about an 'S'?"
- "Take two people you know well, and talk me through how they would make this decision. What factors would be important to them? What would they prioritize? What can you learn from how they would approach this decision?"
- "Take a few minutes and walk me through the perspectives of the people this decision will affect. How does this change their lives? What is important to them here? How would they feel about each option?"
- Create scenarios that illustrate the impact of the decision. For instance: "Imagine you are a customer that's been doing business with your firm for many years. One day you get a notice that the policy we've been discussing is changing. What do you think of the change? How does it affect your business? Your future?"
- "Imagine you are at the end of your life looking back on this decision. From that perspective, what will seem most important? What will seem less important than it does now?"
- "You've invested a lot in this project so far. Step back for a minute and imagine that you had invested nothing up to this point—that it wouldn't cost you a dime or a minute of your time to walk away. How would that affect your decision?"

Taking on a New Commitment

Leaders are people who can see opportunities and want to pursue new things to make life richer. So when you coach leaders, you are almost always coaching busy people. That means that when new opportunities come along, the key challenge is keeping life in balance. These questions are focused around exploring whether to say "Yes!" to a new opportunity:

- "What's exciting about this new opportunity? What makes this worth pursuing?"
- "What concerns do you have about this? What will it cost?"
- "How does this align with your purpose and mission in life?"
- "Take a look at this new commitment from a resource perspective. Sketch out a plan for where the time and energy will come from to do this well."
- "I get the impression your schedule is pretty full already—it is for most leaders. So what will you stop doing to make room for this new commitment?"
- "Do you feel any external pressure to go a certain way? What is your heart saying?"
- "Can this wait? What are the implications of putting the decision on hold for a bit?"
- "If you say 'Yes' now, how likely is it that in a month you'll wish you'd said, 'No'?"

Being vs. Doing

Helping the client tune in to how s/he is being shaped by the decision itself and the process of making the decision can be a powerful conversation.

- "Who are you becoming through this decision? How is it shaping your identity?"
- "What can you learn from this process about becoming a great decision-maker?"
- "What do your emotions in this decision reveal about the inner you? How do you want to respond to those insights?"
- "What does being faced with this decision now say about where you're at in life?"



Quotes...

"One does not discover new lands without consenting to lose sight of the shore."

Andre Gide



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MODULE 5, PUTTING IT ALL TOGETHER

TIMING	70 minutes	
PREPARATION	<input type="checkbox"/> Read through the module to get a sense of the flow and to gain an understanding of what happens <input type="checkbox"/> Work through the exercises as if you are an Intern to develop examples or samples for explanations <input type="checkbox"/> Read through the module and add notes and your own phrasing and explanations to any complex concepts	
OUTCOMES	In this session, Interns will: <ul style="list-style-type: none"> • Review what they have learned 	
PURPOSE	The purpose of this module is to consolidate all the learnings from the advanced coaching modules.	
MATERIALS	Sticky notes (1 per Intern) Markers Flip chart paper Index cards (1 per Intern)	
MODULE SECTIONS	Coaching feelings	10 mins
	What happened?	10 mins
	Sharing your key learnings	20 mins
	What If?	15 mins
	What Next?	10 mins
	Close	5 mins
MODULE NOTES:		

COACHING FEELINGS – 10 MINS

Give a sticky note and marker to each Intern.

Write 1-2 words on the sticky note that describe how you are feeling about your coaching practice right now. When you have finished writing, put your sticky note up on the wall. Look at the other sticky notes that are up there with yours.

Find a place that will easily accommodate all the Intern sticky notes so that they can be easily seen.

WHAT HAPPENED? – 10 MINS

❓ What did we do today? Shout out what you remember.

Place 2-3 flip chart pages side by side to record what happened during the day.

Record each shout out on a flip chart in the order in which it occurred so that the group has a memorable record of all of the topics that were covered and all of the activities that they completed.

Because you are recording the events in order, you will need to leave appropriate spacing between items.

A reference list for your use:

1. *Module 1, The coaching funnel*
 - 1.1. *Learned about the coaching funnel*
 - 1.2. *Saw a 'before' and 'after' coaching session where the first session didn't use the coaching funnel and the second one did*
 - 1.3. *Identified the coaching behaviours in each step of the coaching funnel process*
 - 1.4. *Did a role play using the coaching funnel to coach Marie-Grace*
 - 1.5. *Debriefed the module*
2. *Module 2, Exploration and probing*
 - 2.1. *Watched a coaching session with Carolita about her failed restaurant*
 - 2.2. *Completed a worksheet to improve Carolita's coaching session*

- 2.3. *Coached a partner using probing questions to replay a coaching session where you weren't sure what the Participant was asking of you*
- 2.4. *Debriefed the module*
- 3. *Module 3, Identifying options*
 - 3.1. *Coached Eric to identify his specific problem*
 - 3.2. *Reviewed the three Option generating techniques in the book*
 - 3.3. *In small groups, decided how to help Eric using 1 of the Option techniques*
 - 3.4. *Did a series of role plays to help Eric identify different options using the three different techniques*
 - 3.5. *Coached a partner to identify options to a current obstacle/problem*
 - 3.6. *Debriefed the module*
- 4. *Module 4, Decision-making*
 - 4.1. *Shared a recent decision that you had made and how you made it*
 - 4.2. *Identified your preferred decision-making styles*
 - 4.3. *Coached a partner to a decision on another issue using a different decision-making strategy*
 - 4.4. *Debriefed the module*
- 5. *Module 5, Putting it all together*
 - 5.1. *Where we are right now.*

SHARING YOUR KEY LEARNINGS – 20 MINS

Give each Intern one index card.

On your card, write the most valuable learning point, technique, or tip that you will take away from today. Make sure you are specific so that anyone would be able to understand and apply this learning. Write clearly so that anyone can read your answer. Don't show anyone what you are writing.

Give Interns 2-3 minutes to complete their index cards.

Now get up and come to the middle of the room. Find another Intern and exchange cards. You will read each other's card. Then, you will spend 30 seconds talking about the cards and decide which card contains the MOST valuable information for you and

why. At the end of 30 seconds, each of you will vote by marking a small line on the **back of the card** you think is the best tip. Then, you will take your partner's card and find another Intern to talk to. You will repeat this process, talking for 30 minutes and then voting on which you think is the best tip by placing a mark on the back of the card. Again, you will take your partner's card and repeat this process.

Call time at the end of 10-15 minutes.

Please gather up all of the cards and bring them up here to me.

Have a cofacilitator count the number of votes on the back of each card and determine what the top 10 tips are. These will be used in the final debrief.

WHAT IF? – 15 MINS

Divide Interns into groups of 5.

You are now going to have a chance to use everything you have learned today.

Regina is one of your Participants. She has come to you to be coached. She is concerned as she has an interview for a job with a hotel coming up next week and is worried that it won't go well. She has had 2 other interviews and didn't get the jobs.

Discuss in your groups what you might do next with Regina. Give examples of the kinds of things you would say and do.

WHAT NEXT? – 10 MINS

Now, it's time to plan how you will use what you have learned today in your role as a coach.

List 5 SMART goals or action steps that you will take to apply what you have learned in the next 2 weeks.

Remind Interns that they should follow through on these goals over the next 2 weeks.

CLOSE – 5 MINS

Thank the Interns for their attention and participation and congratulate them for working to gain a better understanding of coaching.

Reassure them that you know they will continue to develop their skills as coaches and make a BIG difference in the lives of those they

coach. Encourage them to use the Coaching Questions book as a coaching handbook and explain that there is much more valuable information in there, in addition to what was covered in this coaching workshop.

- ❓ Would you like to hear what you voted as the Top 10 Most Valuable Lessons for the day?

Read the list of the top 10 tips from the index cards.