Coach others in job skills

D1.HRD.CL9.01
D1.HHR.CL8.03
D2.TRD.CL8.02

Trainee Manual

Australian Aid

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William Angliss Institute

Specialist centre for foods, tourism & hospitality

Coach others in job skills

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Trainee Manual

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on “Toolbox Development for Priority Tourism Labour Division”.

This publication is supported by the Australian Government’s aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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File name: TM_Coach_others_in_job_skills_refined

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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a ‘toolbox’ which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The ‘toolbox’ consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim is of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of ‘Recognition of Prior Learning’ (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service

- Front Office
- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria". An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title:* statement about what is to be done in the workplace
- *Unit Number:* unique number identifying the particular competency
- *Nominal hours:* number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Coach others in job skills

This unit deals with the skills and knowledge required to Coach others in job skills in a range of settings within the hotel and travel industries workplace context.

Unit Code:

D1.HRD.CL9.01
D1.HHR.CL8.03
D2.TRD.CL8.02

Nominal Hours:

25 hours

Element 1: Prepare for on-the-job coaching

Performance Criteria

1.1 Identify the need for coaching based on a range of factors

1.2 Identify skill deficiencies that could be addressed by coaching needs through discussion with the colleague to be coached

1.3 Organise with colleague a suitable time and place to conduct coaching in accordance with enterprise policy

Element 2: Coach colleagues on-the-job

Performance Criteria

2.1 Explain to the colleague the overall purpose of coaching

2.2 Explain and demonstrate the specific skills to be coached

2.3 Communicate clearly any underpinning knowledge required

2.4 Check the colleague's understanding

2.5 Provide the colleague the opportunity to practice the skill and ask questions

2.6 Provide feedback in a constructive and supportive manner

Element 3: Follow up coaching

Performance Criteria

3.1 Monitor progress with new skills in the workplace and provide supportive assistance as required

3.2 Report progress to the appropriate person as required

3.3 Identify performance problems or difficulties with the coaching and rectify them or refer them to the appropriate person for follow-up

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

The Assessment Matrix indicates three of the most common assessment activities your Assessor may use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

		Work Projects	Written Questions	Oral Questions
Element 1: Prepare for on-the-job coaching				
1.1	Identify the need for coaching based on a range of factors	1.1	1, 2	1
1.2	Identify skill deficiencies that could be addressed by coaching needs through discussion with the colleague to be coached	1.1	3 – 13	2
1.3	Organise with colleague a suitable time and place to conduct coaching in accordance with enterprise policy	1.1	14, 15	3
Element 2: Coach colleagues on-the-job				
2.1	Explain to the colleague the overall purpose of coaching	2.1	16, 17	4
2.2	Explain and demonstrate the specific skills to be coached	2.1	18, 19	5
2.3	Communicate clearly any underpinning knowledge required	2.1	21, 21	6
2.4	Check the colleague's understanding	2.1	22, 23	7
2.5	Provide the colleague the opportunity to practice the skill and ask questions	2.1	24, 25	8
2.6	Provide feedback in a constructive and supportive manner	2.1	26, 27	9

		Work Projects	Written Questions	Oral Questions
Element 3: Follow up coaching				
3.1	Monitor progress with new skills in the workplace and provide supportive assistance as required	3.1	28, 29	10
3.2	Report progress to the appropriate person as required	3.1	30, 31	11
3.3	Identify performance problems or difficulties with the coaching and rectify them or refer them to the appropriate person for follow-up	3.1	32, 33, 34	12

Glossary

Term	Explanation
CBT	Competency Based Training
Chalk and talk	A method of coaching/teaching using written notes on a board (‘chalk’) and lecture (‘talk’)
Coaching plan	A written plan prepared by a coach to help and guide them when delivering coaching to a specific person on a specific topic or range of topics
Compliance-related issues	Legislated requirements on businesses and/or staff requiring them to comply with various mandatory obligations
Closed questions	Questions which can be answered with a simple ‘Yes’ or ‘No’: they do not encourage information from the person to whom they were asked
Entry level	The level of knowledge and/or skills a worker has when they start their coaching or training
HR	Human Resources
Handouts	Printed (or handwritten) material given to the learner
Mnemonic	A simple word, phrase or technique used to remind you of a more complex concept
Multi-skilling	Teaching a worker other skills so they can undertake more work or work in a different area or department, or prepare themselves for promotion or extra responsibilities
Open questions	Questions which cannot be answered with a simple ‘Yes’ or ‘No’: they encourage information from the person to whom they are asked
Remedial coaching	Coaching designed to change or improve the way a worker undertakes tasks
Remuneration	Pay, wages, salary

Element 1: Prepare for on-the-job coaching

1.1 Identify the need for coaching based on a range of factors

Introduction

Coaching plays an important role in any enterprise and being asked to coach a workmate is recognition of your current skill and your potential to pass on that expertise to others.

Up to date skills and information must be regularly passed on to both new and old employees. Coaching will ensure that all staff are confident in working the systems and equipment present in the workplace and in complying with workplace procedures.

What does coaching relate to?

Coaching a colleague will generally relate to:

- Presenting and explaining verbal and/or written information
- Demonstrating practical skills
- Observing a colleague complete a task
- Providing follow up advice, support and feedback
- Reviewing a colleague's work and work practice.

Competency standards

Since the introduction of Competency Based Training (CBT), coaching may be conducted in line with a 'competency standard'.

A competency standard is a benchmark level deemed as being the necessary level a person needs in order to proficiently perform a specific task.

These standards may be set in-house by the establishment, or they may be derived from a government or industry-accredited course or source.

It is essential you know the standard you are expected to coach someone to before you start delivering any coaching.

You may be able to identify these standards by:

- Talking to onsite trainers
- Reading internal standards, work procedures and service criteria
- Conferring with more experienced staff
- Talking with management
- Using your common sense coupled with industry and venue knowledge to determine what is applicable.

Identifying the need for coaching

Colleagues may require coaching on existing systems and equipment, coaching on new systems and equipment, or they may require remedial coaching (such as refreshing a person's skills with the aim of improving their current observable performance).

There are several factors that can indicate a need for coaching:

Staff induction

Staff who are inducted may need initial skills coaching in certain areas (because they have no experience at all with a specific task), or they may require remedial coaching (because their existing experience is not at the standard required by the new venue, or the equipment and procedures are different).

Where this is not provided, new staff can easily feel ignored and frustrated, leading to high levels of staff turnover. Since recruiting staff is time consuming and expensive, it makes sense to ensure the appropriate levels of coaching are delivered at this early stage of a person's time with a new employer.

A request from a colleague for coaching

Many staff identify their own need for coaching.

If this occurs recognise staff may feel anxious about disclosing this need, feeling they are 'admitting' their performance is below the required level and fearing they might lose their job.

This means you must be sensitive to the feelings of learners when delivering coaching in these circumstances, and develop a good rapport so they do not feel threatened, compromised or incompetent by virtue of having asked for help.

It is vital they realise their jobs are not at risk simply because they have asked for help.

A direction from management to help a staff member

Management may observe certain staff and determine they require coaching.

Once again, you must be sympathetic to the staff concerned and ensure you support them, rather than further increase their anxiety at being identified as being 'deficient' by management.

It is to be expected that any staff who are told by management they need training are going to be somewhat anxious about their future and job security.

Where appropriate, it is vital you begin such coaching by informing staff their jobs are not under threat. A coaching session set within a framework of mutual co-operation and benefit is much more likely to result in success than one set within a context of coercion and worry.

As a result of personal observation of staff performance

Frequently, coaches are supervisors or middle level managers and their job can present opportunities to observe staff in the workplace.

Your observations in this regard may indicate a need for coaching and, arguably, this is something management expects you to do.

When such circumstances arise, it is critical that *specific instances* are communicated to staff to provide (or prove) the basis for the coaching needed.

Where coaches can identify *specific* needs (that is, actual examples of under-performance/sub-standard performance) staff are more ready to understand, and accept, why they require coaching.

Following a customer complaint

Given you work in an industry where there is a high degree of interaction with customers, it is almost inevitable complaints will occur.

As a workplace coach you need to differentiate between genuine and frivolous complaints so coaching is only offered when a real and genuine need exists.

In reality this usually means you do not automatically respond with a coaching response to each and every complaint received.

As a result of changes in workplace equipment

There will always be examples of new equipment being introduced into the workplace whether items are replacing worn out or superseded equipment or they are new items introduced to enable a new product or service to be provided.

As coaches you must realise, for example, that just because staff could competently operate the *previous* cash register, it does not mean they will be able to use the new one.

It is common for suppliers to provide some form of initial training, but it may well be up to the coach to complete or complement this training, as well to coach new staff.

As a result of changes in procedures

Changes in procedures may be caused by:

- A change in management – new management can have new or different ways of doing things
- A change in establishment focus such as a change in the customer profile the establishment is trying to attract
- Changes in equipment used requiring coaches to teach staff how to use the new items.

Changes in legal requirements

Existing legislation often varies over time, and new legislation can be introduced.

Common legislation requiring your ongoing attention as a workplace relates to safety and health, liquor licensing, gaming and food handling and any other compliance-related issues.

Coaching as a result of these changes often involves making staff aware of the new or revised legislation, but there are occasions where demonstrations to illustrate the new laws and requirements are required.

Case studies and role plays may be used to further illustrate mandatory legislated requirements.

1.2 Identify skill deficiencies that could be addressed by coaching needs through discussion with the colleague to be coached

Introduction

Any coaching session must be undertaken with a definite end in mind. Coaching without an aim is a waste of time, money and effort and likely to be ineffective.

The person being coached must be able to see they have a definite need for the coaching.

No coaching should ever be done just for the sake of it.

To help achieve effective coaching, a coaching plan should be developed and used.

Training and coaching

Formal training tends to be a situation where all staff are required to undertake a set course of instruction. It is somewhat 'lock-step' and everyone is usually expected to complete all of the requirements for the unit, session or topic.

By comparison, coaching is less formal and focuses more on individual staff need as it is identified at the time.

In some ways, coaching can be seen as informal training delivered on the job that supplements other training he business engages in. It is usually of a short duration and addresses common workplace tasks.

For example, a worker may be doing a course at a local training college yet still receive coaching at work to help with their study.

Alternatively, the staff member may not be undertaking any kind of course but still receive coaching to bring their existing skills and knowledge up to the required level.

Websites

Useful websites discussing and further explaining differences between training and coaching include:

- http://www.trainingzone.co.uk/item/94693
- http://internetmarketingtipsweb.blogspot.com/2007/08/what-is-difference-between-training.html
- http://www.wishfulthinking.co.uk/2007/03/14/coaching-is-not-training-mentoring-or-counselling/.

Skill deficiencies that could be addressed by coaching

There is no limit to the skills coaching can effectively address.

In practice skill deficiencies often addressed by coaching tend to be those which do not require formal or extended training sessions but which are short, commonly-used tasks such as:

- Customer service skills
- Technical or practical skills such as operating equipment, making something or completing documentation
- Selling or promoting products and services.

Identifying specific coaching needs

Specific coaching needs for each individual colleague will be determined as a result of considering a combination of three main elements:

- General need for coaching
- The factors relating to the individual colleague
- Discussion with each individual staff member.

What factors will individualise the coaching needed for each staff member?

The following is a representative list of factors you will need to take into account when developing a coaching plan for a staff member.

Remember, factoring in these considerations is important because you do not want to deliver coaching seen as unnecessary.

You need to make sure you address genuine, identified need.

Urgency of the coaching

This can be influenced by:

- The number of staff needing to be coached. If all staff have to be coached, the need can be urgent
- The nature of the coaching topic, such as whether or not it is a legal requirement, a safety issue, or strongly related to revenue and/or service standards.

The colleague's previous work, life experience and training

It is useful to know whether or not staff have had positive or negative experiences with earlier coaching/training.

Colleagues with negative experiences relating to coaching/training can warrant:

- Extra attention
- More support
- Added time to ensure they understand the first time they receive coaching. This allows you to build success upon success with your coaching.

The colleague's current skill level

When delivering coaching it is vital to know where the individual staff members are starting from, and where it is you want them to go.

This helps avoid coaching them in skills they already have competency in, and allows you to describe to them the path individuals will take in their future coaching/training.

This level of starting information and skills is referred to as their 'entry' level to training/coaching.

In the workplace this means having a very clear idea about the standards involved in the task being coached, and the establishment practices and protocols that apply. It is to be expected you will already know these or you would not have been chosen as a coach.

If you do not know the required workplace standards, criteria, practices and protocols you must take action to learn them.

The colleague's prior knowledge

When coaching staff, it is standard practice for the coach to move from the known to the unknown in terms of any knowledge or skill being delivered.

This means when you coach someone you should begin with something the person being coached already knows, and build on it.

For example, if you were coaching a staff member on new legislated requirements in relation to dealing with intoxicated customers, you might use as the starting point for your coaching session the experience the staff member had last weekend when they refused service to an intoxicated person.

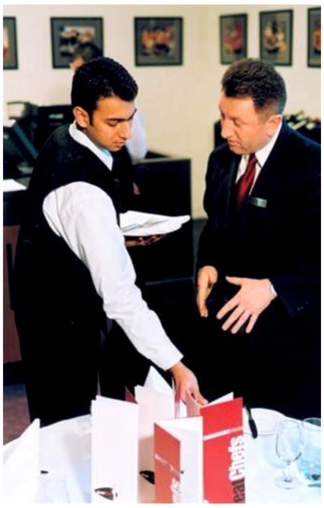
Alternatively, you might base a session of grinding coffee beans on their previous training in using the espresso machine to make lattes.

The colleague's weaknesses

It is important whatever weakness has been identified as being the basis for the coaching can be agreed to by the staff member as being a legitimate need for coaching.

Standard coaching procedure is to gain agreement from staff that it is a good idea for the coaching to take place to address an identified training need.

As mentioned earlier, coaching for coaching's sake is a total waste of everyone's time so it is best to obtain agreement at the beginning that there is a need for the coaching.



This may require you to:

- Provide evidence you have of their below standard performance. This may be your own observations, letters from unhappy customers, samples of sub-standard product, copies of internal documents they have competed incorrectly
- Ask them to perform a nominated task. This is often useful and can quickly gain their agreement that there is a need for the assistance coaching will provide when they show they cannot perform to the standard required.

The colleague's strengths

Knowing a staff member's strengths provides you as the coach with an opportunity to use the staff member themselves as a coach.

There is absolutely nothing wrong with using other staff to coach other staff, providing appropriate levels of competencies (perhaps combined with appropriate experience too) exist.

Knowing these strengths also ensures you do not coach those staff in things they already know and have competency in.

The required standard/level at which the learner is required to work

You are only required to coach staff to the level the establishment requires them to work to, so before you start coaching you must know this level (sometimes referred to as the 'standard') they are required to work to.

Within the one venue there can be different standards/levels of service or product. For instance, the level of bar service in a cocktail bar will be different from what is required in another bar.

When coaching, there is only a need to coach to the level/standard required in the particular area where the staff member works.

This means someone who works in a cut-price establishment does not need to be trained to the level required of the same position in a 5-star venue.

Coaching people to a standard they do not need to have is a waste of time, effort and money and may confuse the staff member who is being trained, especially when they never get to use the extra skills or knowledge they are coached in.

There are, however, certain times when staff are intentionally coached in additional skills and knowledge. This is known as 'multi-skilling' where workers gain skills and knowledge to allow them to work in another area or department if the need to do so arises.

The colleague's time restrictions and personal affairs

Coaches must strive to match the delivery of their coaching with the ability of staff to attend.

This means factoring in the work demands of staff together with their out of work obligations such as their family, sporting commitments, community service obligations and socialising requirements.

It is often frustrating to have to arrange coaching around such restrictions, but it is part of coaching and training life. Arranging a suitable time for coaching seems to be a continual juggling act trying to get times when both you and the person being coached are available and willing to participate.

Sometimes coaching may occur during working hours and sometimes it may need to occur before or after work.

Discussing things with the learner

It is important for the person being coached to be involved in the development of their coaching plan. This helps them to understand coaching is being created to suit their needs and to help bring their workplace performance in line with expectations.

Their involvement in the planning phase will:

- Demonstrate your intention to assist them as an individual. This discussion shows the investment the business is prepared to make in them
- Prove they are a valuable asset to the organisation even though they may not be 100% competent. This should help allay any fears they may have about losing their job just because they cannot do things, or they do not know things
- Allow them to share any additional coaching needs they have. Many staff have 'hidden' coaching needs they are reluctant to share, fearing job loss, reduced hours or less chance of promotion
- Enable you to get to know them better as an individual. This includes finding out about their previous training experiences, identifying restrictions they have on their participation in coaching, talking about their previous work history/experience and their out of work interests.

Your discussion with the learner should also:

- Explain why the coaching is needed
- Highlight the benefits of receiving coaching to the learner, the business and to the customers
- Obtain agreement coaching is a legitimate activity in the particular context and can be seen as a way of achieving mutually acceptable results
- Agree to outcomes/goals for the coaching.

Prior to creating a formal coaching plan

Before you start to generate your coaching plans you should have some idea of the overview of the type and extent of the coaching required for each person. Remember, every learner will need to have their own unique coaching plan. They may all be variations on a theme but they must reflect the individual needs of each staff member and take into account their individual level of skills, availability and outside commitments.

The following are some basic examples of what you should know or consider, at a minimum, before any really useful coaching plans can be prepared.

Scenario One

- Your observation of colleague – Mary makes cappuccinos that look like flat whites
- Coaching need(s) – since Mary is already proficient in using and cleaning the espresso machine, she only needs to be coached in how to froth milk
- How the coaching may be tailor-made – Mary is a full-time employee and can be coached during a quiet daytime shift.

Scenario Two

- Your observation of colleague – John makes cappuccinos that look like flat whites
- Coaching need(s) – John has little experience in using an espresso coffee machine, so he will have to be trained on how to clean and operate the espresso machine, as well as how to make various coffees, including steaming and frothing the milk
- How the coaching may be tailor-made – John will have to be trained during the evening as he has a full-time job elsewhere.

Scenario Three

- Your observation of colleague – Sid is a new employee in the establishment, but he has been waiting on tables for many years. After a week or so it is obvious he lacks the polish of his peers in this new job. He makes occasional mistakes with orders and gets the accounts wrong on a fairly regular basis
- Coaching need(s) – Sid needs to be trained in all systems/procedures, menus, some equipment, house policies, and safety and health requirements
- How the coaching may be tailor-made – Sid can only be trained on the weekend as he has other personal and work commitments during the week.

Scenario Four

- Your observation of colleague – Karen is a new food waiter. She has only ever worked in a bar environment in the venue but is keen to learn new skills in the restaurant. She has excellent customer contact skills.
- Coaching needs – Karen needs to be trained in all system procedures, menus, familiarised with all equipment, and safety and health requirements. She also needs training in plate carrying skills, docket writing, table settings, the sequence of service, taking reservations, making a table plan, and preparing the waiter's station.
- How the coaching may be tailor-made – Karen has indicated she is eager to learn new technical and operational skills and is happy to either come in an hour early when rostered for or to stay an hour after her rostered finishing time.

Making a plan

The more time spent preparing a coaching plan, the better the actual coaching will be.

A lack of adequate planning is the single most common reason for poor coaching.

In practice, how your coaching session goes, will depend 99% on the way you planned it to go. The critical importance of planning any coaching/training sessions cannot be over-stated.

Planning every coaching session is vital.

As they say, 'If you fail to plan, you plan to fail'.

The coaching plan

There are many different 'plans' that can be used to help coaches deliver their coaching sessions.

All of these plans are essentially variations on a theme and you should feel free to experiment with different coaching plans (or 'session plans', or 'lesson plans') available.

There is no legally required type or style of coaching plan. It is a matter of personal preference as to what style you elect to use.

The role of the coaching plan:

- Is to help you sequence the material you want to deliver to the learner
- Is to help you remember all the content you need to deliver
- Is for your use only – no-one else needs to see it, read it or use it
- Provides you with an opportunity to work out in advance:
  - How you will start the session
  - The key points you want to make
  - How you will conclude the session
  - What materials you will need in order to conduct an effective session
  - How you will determine, if applicable, whether the learner has successfully learned what was necessary or intended
  - Timing requirements – how long the session and individual parts of it will take.

Your first plans will commonly be pretty lengthy but they will be vital to the success of your session (you might do a first draft, a second and even a third draft before you get to the finished product) but stick to it.

If you decide to do a session without a plan you will soon understand why you need one.

Preparing a Task Breakdown

When delivering coaching for a practical skill it is usual for the coach to prepare a Task Breakdown sheet to guide the session.

In some organisations these sheets will exist as part of the standard operating procedure. In other places, you as the coach will have to develop them from scratch.

The intention of this stage is to produce a written analysis for each job that can eventually be converted into a checklist. This is a printed form setting out the major steps to be performed, and the features in each of the steps.

Task breakdown sheets can only properly be prepared when you are fully aware of all the aspects of the task under consideration:

- You must know all the knowledge, skills and attitudes required to complete the task
- You must break down major steps of the task into sub-steps and features
- You must ensure correct sequencing of all activities
- You must be aware of any special factors applying to any aspect of any step or sub-step (the so-called 'tricks of the trade', or certain safety issues).

Not only must the physical task itself be analysed, but associated standards related to quality and quantity – for your workplace – must be determined.

The quantitative aspects can frequently be measured in terms of speed, wastage, weight, specific size and percentages and these are relatively easy to measure, however qualitative factors (such as use of communication and interpersonal skills) are more difficult to measure but are nonetheless critical, especially in the service industries.

Where a Task Breakdown sheet is not used, there is always a risk the coach only passes on the bits he or she knows (which may include dangerous practice, wasteful methods, incorrect professional techniques), as well as the chance the job/task can be delivered in a disjointed and ad hoc fashion or important key information is missed.

A Sample Task Breakdown

"To serve a glass of draught beer"

Step	Description	Checks	Essential knowledge
1	Select correct size and shape of glass	Check clean and not chipped	• Correct glass • Fingers at bottom of glass
2	Select beer as ordered by customer	Confirm selection	• Beer product knowledge
3	Fill glass with beer	Check beer is cold Do not knock glass against tap	• Put 'head' on bottom of glass • Flick tap on and off • Hold glass around bottom • Raise glass as it fills Compensate for drawing conditions • Do not overfill
4	Present glass to customer	Beer looks presentable	• Place serviette under glass • Ensure glass badge faces customer

One approach to a coaching plan

Any plan must begin by setting out what it is that is to be achieved. There should be a clearly stated 'Objective' or 'Aim' or 'Learning outcome(s)' for the session.

Essentially this is where the aims of the session are clearly and concisely stated at the outset.

You can add individual details if you want, such as date the coaching is to be delivered and specific title of the session, if applicable.

Next may come a section headed 'Preparation' listing all the equipment, items, tools, facilities, manuals, notes, and audio-visual equipment you will need throughout the session. This list grows as your plan takes shape.

It becomes a checklist you can refer to prior to delivering the coaching session to check everything needed is available and ready.

Next an 'Introduction' heading may be written up.

This explains how you intend to introduce the topic/session to focus learner interest in what is about to be delivered, to help verify prior knowledge, or to revise any previous coaching.

The Introduction might be a challenging question, a startling set of facts, a humorous anecdote, or an attention-grabbing demonstration.

Next comes analysis of ‘Content’ (that is, what is going to be taught) and ‘Method’ (that is, how it is going to be taught) along with a ‘Time’ frame (allocating each section of the coaching session a pre-determined number of minutes to guide the pacing of the session to ensure it finishes on time and everything will fit in to the time available).

The Content section should set out the key points to be covered in the session, laying them out in the order identified as being the most appropriate sequential arrangement.

Key questions may be written down to prompt you about what to ask. Key points may also be written down to prompt about what to say. Even the answers to the questions you plan asking can be written in so you do not forget, or get caught out.

The Content should be laid out as clearly as possible, making things as easy to do as possible so trainees can succeed and build on their success.

In addition trainers must know where to draw the line about what to include in the training and what to leave out.

The content must build on existing knowledge and proceed from the known to the unknown.

Other points to consider in any type of session plan are:-

- Stick to the main topic – do not waste time on peripheral or unimportant issues
- Teach the basics first
- Move from the important points to the less important ones
- Put the task in context by illustrating how the content in question fits into the overall scheme of things
- Get learners to observe and then to reason about what they have seen.

When writing the plan, ensure the writing is sufficiently large, clear and legible so you can refer to it easily during the training session.

Under ‘Method’ is listed the training technique (‘Demonstration’, Video’, ‘Chalk and talk’) you will use to deliver each part of the Content.

Next comes a heading ‘Conclusion’ where you set down what is going to be said and/or done at the end of the session to finalise the session.

The Conclusion may include some verbal summary of what has been done, and/or a few questions to check the extent of the learning and understanding.

The conclusion should always include some constructive feedback to the learner on how they went in the session.

Below is a model session/coaching plan to use or adapt for your sessions.

OBJECTIVE:

PREPARATION REQUIRED:

INTRODUCTION:

CONTENT	METHOD	TIME

CONCLUSION:

Another approach

The following is a different approach. It is an alternative way of achieving the same thing.

It is an option you might consider to work out which approach best suits your individual style.

It is simply another pro forma for a session/training plan – this model/approach sees any training session as comprising 3 parts similar to an aircraft trip:

- An Introduction (the 'Take-Off')
- A Body (the 'Flight')
- A Conclusion (the 'Landing').

Introduction

INTRO:

This stands for:

- **I – I**nterest
- **N – N**eed for training
- **T – T**opic
- **R – R**ange
- **O – O**utcomes

Conclusion

In this model the Conclusion follows '**OFF**', as in 'Sign off':

- **O – O**utcomes: re-cap what you covered in the session
- **F – F**eedback: re-assure and support learners, and also get feedback about your coaching performance
- **F – F**uture: tell the learner what will be coming up in their next session.

The Body

This is where the main Content (practical or theory) is delivered

Using demonstration

Where you have decided to use Demonstration as your Method:

- Tell trainees about what you will be doing
- Do it at normal speed without talking/explaining
- Then do it slowly, explaining it step-by-step
- Ask questions to check trainees have understood :
  - "What's the next step?"
  - "Why did I use a 38mm spanner?"
  - "What document would I complete now I have finished this?"
- Give staff an opportunity to practice – watch and question them, helping where necessary
- Check on standards – have they measured up to your workplace requirements?

Using theory

Where you have decided to use Theory as your Method:

- Make sure the Introduction is motivating because attention will wane more readily with theory sessions
- Put in appropriate *practical* action as soon as possible after the theory has been delivered where learners perform some sort of activity that applies the theory.

  For example:

Knowledge/theory presented	Application activity
Reading material/notes	Discuss notes
Reading a manual	Develop a personal checklist
Watch a demonstration/DVD	Complete XYZ form

- Summarise content regularly, asking learners to also do the summary
- Indicate the workplace application of the theory at all stages.

Other tips include:

- Break theory into "bite-sized, digestible chunks' – do not drown learners with information
- Do the 'Must Know' first – then the 'Should Know' and 'Could Know' if there is time
- Determine the sequence you will deliver in taking into account you should move from:
  - Most to least important
  - Simple to complex
  - Specific to general
- Always cover safety concerns
- Always refer to present *workplace* procedures.

The following pages show how the above concept can be used for a theory session where the learner will be coached on making a pizza.

Theory session planning sheet

Session title
Making a pizza

Venue
Training room

Time
5 minutes

Learning resources
Whiteboard, handouts

Content (task list, overview)
Explanation and demonstration; learner handouts

Aim
To introduce learners to easy pizza making with minimum implements at home

Underpinning knowledge
Very basic cooking ability including awareness of domestic oven operation

Learning outcome/Objective
Basic knowledge of pizza dough making

Assessment criteria
List steps in activating yeast for baking
Explain basic pizza mixing and raising technique
Explain pizza oven temperature and technique

Assessment methods and procedures
Multiple choice questionnaire

(Acknowledgement – Linda Gain)

Skills session planning sheet

Session title
Venue
Time
Learning resources
Content (task list, overview)
Aim
Underpinning knowledge
Learning outcome/Objective
Assessment criteria
Assessment methods and procedures

Time	Key points	Methods and learning resources
	GLOSS	**INTRODUCTION**
	Give an overview of the whole skill	**BODY**
	Demonstrate at normal speed	
	Demonstrate again, but slowly, and describe each step	
	Check understanding	
	Observe learner perform the skill	
	Check that the skill was done to the appropriate standards	
	OFF	**CONCLUSION**
Comment:		

Theory session planning sheet

Time	Key points
	1. Introduction
1 min	**G** Pizza for kids and tired parents is a favourite – not too greasy and informal – but bought pizzas cost anything up to $15 delivered – and you often have to warm them up. This session aims to show you how five minutes of work and a dollar or two at most can make a good pizza **L** Everyone here knows how their oven works and can mix ingredients. That's about all you have to know **O** By the end of the session you'll be able to save yourself between three and seven bucks a time each time you make pizza **S** We'll go through five simple steps, learn in a minute about yeast in baking, and with the handouts, be able to go home tonight and bake **S** We're talking here of win-win. Not only can you easily make a home pizza and save money, but as a triple whammy you can put better quality ingredients on your home pizza than many commercial outlets provide!
	2. Body
30 secs	Definition of pizza – 'easy bread' – simple to put together, dead simple with a Kenwood or similar – actual preparation time is minimal – two periods of waiting and oven heating but otherwise low-work
1 min	Preparation of yeast – do not be afraid, instant yeast always works if one rule (lukewarm or tepid water) is followed. In 10 – 20 minutes in a warm place (near heater, warm window, even sink of warm water) foam something like beer or stout foam or head will well up – this means that the yeast is started and it's ready
30 secs	Next step is simple – put flour, olive oil, salt and the yeast mixture into the bowl, and mix until it forms a fairly sticky dough mass after scraping the bowl. Put a good pinch or two of flour in the same bowl, and drop the dough in. Cover with a damp tea towel and leave in a warm place, as before, on or near the oven. Wait 30 minutes to 1 hour, or until doubled in size approx. Turn on oven to 200 - 235°C (Mark 6)
1 min	Dust a board or flat surface with flour, and knead/roll the pizza out from a rounded lump, using more flour if necessary. (Explain very briefly about toppings and give handouts). Place on a baking sheet or round with greaseproof parchment underneath. Bake on the top or next top shelf of the oven (explain briefly about oven heat/types).
1 min	**O** With the handouts and this theory session, you should be able to make a basic pizza, as long as you've got topping, and remember the yeast rule – after that it's all plain sailing. You can save money and eat better, with a little practice **F** Any questions relating to the basic procedure? I'm happy to give advanced tips or discuss pizza later – but first any problems with the basic procedures? (Hand out assessment questionnaire) **F** With basic yeast skills used in pizza, you can go to any other sub-branch of yeast cookery – like bread, rolls, yeast cakes and things like babas – they all rely on the same, easy principles, and the yeast rule

(Acknowledgement – Linda Gain)

Pizza making – Multiple choice assessment

Which of the answers to each question is most correct?

1. The dried yeast used in pizza making should be sprinkled into:
   - ☐ Warm water from the tap
   - ☐ Olive oil
   - ☐ Lukewarm or tepid water
   - ☐ Pure mineral water
2. Activated yeast and water looks like:
   - ☐ Rising bread
   - ☐ Thick beer foam
   - ☐ Milk
   - ☐ Cloudy water
3. The best oven temperature for pizza is:
   - ☐ As hot as possible
   - ☐ 200 – 235ºC
   - ☐ Warm oven
4. The rising pizza dough should be covered with:
   - ☐ Plastic wrap
   - ☐ A damp tea towel
   - ☐ Flour
5. The pizza topping ingredients should be put on the dough:
   - ☐ Just before baking
   - ☐ Well before baking to allow them to marinate
   - ☐ While they are in the oven
6. Pizza is ready from the oven:
   - ☐ After an hour
   - ☐ After 10 – 15 minutes but it should be watched
   - ☐ After 15 minutes

1.3 Organise with colleague a suitable time and place to conduct coaching in accordance with enterprise policy

Introduction

There is often the belief coaching sessions ’just happen’.

The reality is effective coaching must be planned, organised and arranged.

Coaching sessions not properly planned tend to confuse the learner and embarrass the coach.

Organisation policy

Different establishments will have different policies relating to the delivery of training sessions.

A central issue relates to paying staff to attend training.

Some employers are happy to pay staff to attend training, and others prefer not to do so.

A variation to this is where the employer may be prepared to pay, say, for 2 hours of coaching but the staff member is expected to contribute the rest of the time needed ‘free of charge’ (at their own expense and in their own time without being paid).

Check to see what applies where you work. It can obviously be much more difficult to arrange training sessions for staff who are not being paid to attend.

Another factor is the approach taken by the organisation toward certain competency topics. For example, an establishment may say it is a condition of continuing employment that all staff successfully complete the in-house course in ‘cash register operation’.

The fact that this unit is ‘compulsory’ generally makes it a lot easier to arrange the coaching as staff are more willing and eager to attend.

Organisation policy may also relate to:

- The sequence in which coaching is delivered on various topics
- Who is eligible to receive coaching. Generally, *all* staff are eligible
- Where the coaching can occur. Most times it is on the job but there may be times when:
  - A training room is to be used
  - Off-site training may be required
- Payment for coaching – identifying whether or not staff who provide coaching are entitled to payment for delivering out of hours coaching

- Who can deliver the coaching. There may be a requirement that only nominated people with specified experience and/or qualifications are allowed to provide on the job coaching
- The relationship between coaching and other formal training. Coaching is usually regarded as a fundamental addition to formal training, enabling workplace practice and allowing the training to take on an actual workplace context.

Coaching contexts

Coaching sessions are usually conducted in a range of workplace contexts including:

- On the job coaching during work hours where the coaching is regarded as part of the time worked by the employee.

  This coaching initially takes place during quieter periods in order to minimise disruption to trade and reduce interruption to service.

  Often this type of coaching will build up to coaching in busier situations where actual workplace pressure can be added to in order to create a more realistic situation
- Before or after work. These times are useful because the equipment needed for coaching is usually available and free for coaching purposes rather than being needed for servicing customers.

  When using these options you will need to take into account:

  - Out of hours commitments the learner has – are they able to arrive at work early or do they have to drop children off at school? Can they stay back after their shift has finished or do they have a team sport they have to go and participate in?
  - The fact the learner may be tired after their working day so coaching them ‘after work’ may not be a good idea. If they are tired they are likely to be resentful at having to stay back and be coached, and the chances are they will not learn as efficiently either
- In a simulated location away from the actual workplace. This can occur where the organisation has a dedicated training room, or it may involve moving off-site and using, for example, the facilities provided at head office, a supplier’s premises, a recognised training provider (College or Institute) or some other business with whom partnering arrangements have been established.

Organising coaching

Time and date

A specific time and place for coaching must be organised with the colleague. As we have said, good coaching does not just happen, and it has to be planned.

The time and place should be agreed to by you and the learner.

Note some establishments have a separate training room where coaching can take place, but actual workplace coaching is preferred by many.

It is a fact coaching will tend to be ineffective if it takes place in an inappropriate location and at an inappropriate time. For example, it would be very unproductive to coach your colleague in a bar during trading hours where there is a shortage of staff and has customers standing four-deep waiting for service.

Coaching should be conducted wherever possible in a comfortable environment and at a time when the learner will be able to focus solely on the information being transferred. This means the coaching location should be as free as possible from distractions and interruptions.

There should also be a lack of external pressure from customers and other staff. Therefore there should preferably not be other people standing around watching, or listening to what is going on.

Time, date and location of coaching will further depend on factors such as:

Reason for the coaching

Where the coaching is urgently needed, staff seem more prepared to participate almost 'anywhere, anytime'.

Because they realise the urgency involved, they will accommodate nearly any time, date and location for coaching.

Also, the reason for the training will often determine what equipment and other resources are needed to conduct the coaching. For example, you cannot coach someone in cellar operations in the housekeeping department! (See 'Room availability – location of the coaching' below).

Staff availability and your availability

In many instances, staff may not be able to be coached when they are rostered 'on' to work. The reality is arranging a time for coaching is nearly always a problem.

There may often be times when you, as the coach, are available and the staff member is not, or vice versa.

In many situations coaching may need to be done before or after work. In other circumstances, you may need to negotiate with the relevant supervisor to have staff released from duties to attend coaching.

Room availability – location of the coaching

The 'training room' may be unavailable, or the room/workplace location in which you intended to do the coaching may be in use. This can often be a problem in role specific rooms such as the cellar, the bottle shop, the dining room, accommodation rooms and front office.

While there may be a room available, it may not be suitable for the particular coaching need, especially where specific items of equipment are required.

Likewise, certain coaching will require access to relevant stock – food, beverages, linen.

Agreement about a time and date for the training therefore needs to factor in the availability of a suitable location for the training and the availability of supporting resources to enable the coaching to occur.

Operational staffing levels

Service to guests and customers must take precedence over coaching.

This means it is vital to maintain suitable staffing levels at all times and not to compromise service levels because of coaching demands.

If you have to choose between coaching and serving customers, serving customers must always take priority unless there is a very real safety issue involved.

To conclude

You should not only simply tell the learner when and where their coaching session will be.

You have to involve them in the decisions and negotiate a time and date with them.

You should also:

- Advise of the finishing time so they can arrange other aspects of their private, social or work life
- Tell them if they have to bring anything with them
- Let them know if you expect them to have done something before they arrive such as read a workplace policy, watched another staff member undertake a certain task
- Confirm the location for the coaching session.

When a mutually agreed time, date and location for the coaching has been established, this should be noted on the coaching plan.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Note: this Work Project forms the basis of the following two Work Projects.

1.1 To meet the requirements of the Work Project you are required to provide written, video, photographic or other evidence you have:

- Identified a workplace colleague who has a need for coaching
- Described the factors indicating a need for that coaching
- Identified the skills or knowledge required by the colleague
- Obtained agreement from the colleague there is a need for the identified coaching
- Developed a coaching plan for the coaching to be provided
- Organised a mutually acceptable time and place to provide the coaching.

Summary

Prepare for on-the-job coaching

When preparing for on the job coaching:

- Realise staff need to be coached to workplace competency standards
- Be aware the need for coaching can be identified at staff induction, following a request for coaching from a colleague, as a result of a management direction to provide it, or as a result of personal observation
- Realise a change to workplace practices, procedures or equipment and introduction of new legislation can trigger a need for coaching
- Ensure there is always a need for any coaching to be delivered. Never impose coaching: obtain agreement from the learner there is a need for it
- Factor in the experience, skills and knowledge of the learner. Never coach them in what they already know
- Talk to the learner to gain agreement that coaching is a legitimate means to address their accepted and identified need
- Prepare a coaching plan for coaching sessions
- Organise a mutually agreeable time for coaching
- Select a suitable place for coaching
- Arrange and obtain the necessary materials/resources to support coaching in accordance with the coaching plan.

Element 2:
Coach colleagues on-the-job

2.1 Explain to the colleague the overall purpose of coaching

Introduction

Skills to be coached are generally those which do not require formal or extended training sessions.

This means coaching is commonly applied to common, practical tasks which are of a short duration such as:

- Customer service skills
- Technical or operational skills such as operating equipment, making something or completing documentation
- Selling or promoting products and services.

Before a coaching session commences, the overall purpose of the coaching should be explained to the learner even though it was agreed to at the planning stage.

This explanation helps to set the scene for the coaching and serves to focus attention on what is about to take place.

Coaching must never simply be imposed.

Even though your coaching is underpinned by a legitimate rationale, adults do not respond well to anything imposed on them.

What might be the purpose of the coaching?

The overall purpose of coaching may be one or more of the following:

- To increase product knowledge
- To address a legally-imposed compliance requirement
- To increase workplace safety
- To reduce wastage
- To increase productivity
- To raise service delivery standards
- To change an existing skill to one required or preferred by the employer
- To prepare the learner for extra duties, promotion or additional responsibilities.

Before each coaching session

Remember, before each coaching session, the following three things should occur:

- The purpose of the session should be explained to the learner
- Agreement should be gained that there is a need for the coaching
- Agreement should be obtained that a coaching session (or series of sessions) is a legitimate and effective way to achieve the intended goal.

Tips to use when explaining the purpose of the coaching

Suggestions to remember when preparing staff for coaching are:

- They should be informed of the *need* for the coaching and how it will benefit them in their daily tasks. This will help provide fundamental motivation for the coaching and demonstrate there is a genuine need for the coaching
- Where applicable, the learner should also be informed about how the coaching will benefit co-workers, customers and the business
- The learner should be encouraged. As the coach you must ensure staff feel you are there to *support* and *help* them.

  Extremely high levels of interpersonal skills are critical for successful coaches.

  Learners must feel confident and comfortable enough to ask the coach questions. Any learner who feels uncomfortable with their coach, or feels intimidated by them, will never learn to their optimum capacity.

  To be clear about this, ***it is 100% the responsibility of the coach*** to create and maintain this supportive and encouraging environment
- Staff should be encouraged to be *involved* in the coaching session. This means all coaching sessions must be *participatory* in nature.

  Adults learn better and quicker if they *learn by doing* rather than simply by watching or listening
- The coaching session is being conducted for the benefit of the learner. Ensure you do not shift the focus of the coaching to yourself.

  It is a common trap for coaches to begin to feel the coaching sessions are being undertaken so they can show the learner how smart or competent they are!

  Remember: the coaching session is there to assist the learner, not to indulge the coach.
- Create a positive environment conducive to learning. The coach must use excellent interpersonal skills welcoming the learner into a supportive and caring place where the focus is on fostering and cultivating.

  This means the coach will need to adjust the pace and flow of their coaching to meet the needs of the learner. Not all learners will learn at the same speed so the effective coach must modify their delivery to take this into account.

2.2 Explain and demonstrate the specific skills to be coached

Introduction

To explain and demonstrate a skill, the coach must be well versed in the theory and practical components of the task – it is inadvisable for a coach who is not fully competent in a skill to try to coach in it.

As obvious as this sounds, there may well be occasions where you are required to coach in a task you are less than totally proficient in.

While this is a less than satisfactory situation, it is a fact of training life.

In addition, you **must** have the necessary knowledge and skills to perform the task while adhering to all safety and health requirements as well as establishment practices.

Specific skills needing to be explained and demonstrated may relate to:

- New equipment introduced to the workplace
- New processes and procedures introduced by management
- Skills required to compete a job or task effectively and efficiently.

Coaching practice

Every task coached should be explained and demonstrated in a clear, short and simple manner.

Remember, skills to be coached are generally those which do not require formal or extended training sessions.

This means coaching is commonly applied to common, practical tasks which are of a short duration.

The two basic techniques commonly used in coaching sessions are:

- Explanation
- Demonstration.

Explanation

When explanation is required the following are useful guidelines:

- Use industry and establishment jargon as appropriate, but ensure full explanations are provided where necessary. Communication should *inform* the learner, not exclude or confuse them
- Speak slowly, clearly and accurately. Do not rush your words and never assume knowledge on behalf of the learner.
- Ask questions to confirm comprehension. Questions are a vital part of coaching.

A good coach will ask many more questions than the learner (see below).

- Refer to safety and health requirements where and when necessary. All coaching must be set against a framework of required OHS practices.

  It is **never** acceptable to coach people in unsafe practice, or in short-cuts that introduce the potential for accidents

- Make references to the manufacturer's instruction manual where appropriate. Coaching must conform to protocols as listed by the manufacturer's instructions for equipment being used.

  A copy of the manufacturer's instructions should be available for the learner to read, and where possible take away with them for future reading or study.

Questions

There should be lots and lots of questions in any coaching session. The learner will hopefully ask some but the coach should ask loads of them.

Questions should be both 'open' and 'closed' questions, and they should be designed to provide you as the coach with feedback on how the learner is progressing so you can use this information to modify what it is you are doing, if the need to do so exists.

Questions may be along the lines of:

- "Have you got any questions?"
- "What do you think the next step might be?"
- "Do you think this product is now ready to serve to a customer?"
- "Why do you think this product is not fit to serve to a customer?"
- "What are the legal considerations at this stage?"
- "What safety issues are likely to be involved in this task?"
- "What would happen if I now pressed the red button?"

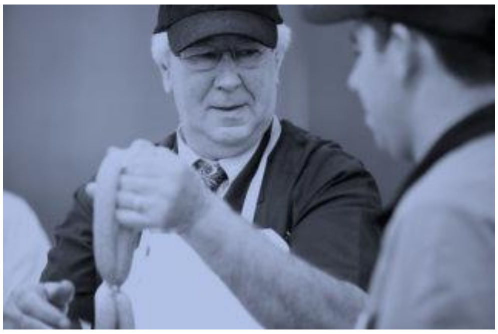
Asking questions does not come naturally to most people so you have to practice asking them.

You should get to the stage where asking questions is a standard part of your coaching delivery.

If the learner knows you ask lots of questions, this can also serve as a motivator for them to pay attention.

Conducting a demonstration

Demonstration is a very common and popular coaching technique. Where a skill is being taught, it is impossible to coach someone without using demonstration.



Remember earlier advice – you must be proficient in the skill being demonstrated or the session will degenerate into an embarrassing farce.

If you cannot do the demonstration yourself, try to get another staff member to do the session with you there to add whatever comments (underpinning knowledge – see next Section – company policies, legal requirements) are necessary.

When demonstration is required, the following are effective guidelines:

Go through the tasks slowly and accurately

It is important you get the task right *the first time*.

Any mistakes on your part as the coach will have an enormous negative impact on the coaching and harm your personal credibility in the eyes of the persons being coached.

This highlights the need for the coach to be competent, and also underlines the need for the coach to practice before delivering coaching.

You have a duty to your learner to be able to competently perform any task you are coaching them in. This is a non-negotiable requirement.

Bear in mind as a coach your role may also be one of 'facilitator'.

That is, your job may be to facilitate the learning process.

This means you yourself do not have to do all the coaching but you may elect to get someone else (more qualified, more experienced) to do certain coaching tasks. This is not an admission of your own incompetence, but more an indication you recognise your own shortcomings yet remain committed to ensuring the learner gets the best coaching help available.

People you might use to deliver some of the coaching sessions might be:

- Other staff from your department (or from elsewhere in the establishment) who have special skills
- Management personnel or owners
- Manufacturers and/or suppliers.

The real key here, regardless of who does the coaching, is they must be competent in the task, too.

Provide verbal explanation when and where necessary

Coaches must be able to explain simply and accurately what they are doing, and why.

This includes being able to correctly name pieces of equipment and procedures being used.

Industry terminology should be used as appropriate, but there is a need to try not to dazzle the learner with your own brilliance on the subject – coaching is not intended to show the learner how smart you are!

Ensure all procedures used in coaching sessions adhere to the establishment's policies and procedures

Internal policies, practices and procedures must be incorporated into the coaching so they become part of the operation, and are not seen as an optional extra.

It is acceptable to coach the learner by showing them legitimate, safe and effective short-cuts that are part and parcel of being a trade professional but it is never acceptable to coach someone in the use of illegal practices or unsafe techniques.

Also be aware that research has shown there is often a gender issue when coaching staff in this regard. Especially, research has shown males will coach females in the correct techniques for a job but not pass on any of the 'inside tips/trade secrets' – they reserve these only for other males.

Try to make sure you share ***all*** your knowledge with all your learners regardless of who they are.

Ensure all demonstration of equipment complies with the manufacturer's instructions

The way learners are coached must conform to prescribed instructions, especially where things such as safety, operation and cleaning are concerned.

Explaining these requirements before you start is a good idea, and also indicating to the learner where the 'operating instructions' are kept is useful.

If you can photocopy relevant parts of the operating instructions to give to the learner for them to take away with them after the coaching session this is even better.

You must also check what you are going to use for the demonstration beforehand to make sure:

- It is safe
- It is fully functional
- All parts are in place – including ancillary items such as printer ribbons in cash registers/terminals
- It has been adjusted where necessary to suit the needs of the learner.

I do it normal …

There is a little rhyme used by coaches and trainers to describe how they might go about doing a demonstration with a learner.

It goes:

"I do it normal,

I do it slow,

You do it with me,

Then off you go."

I do it normal

This describes the first part of the demonstration.

The task is explained to the learner and then the coach demonstrates the task at normal speed with no pauses, and no explanations.

This gives the learner the opportunity to see how 'it' is done and helps to put the whole coaching session into context/perspective.

I do it slow

The coach then repeats the demonstration but this time breaks the demonstration down into sub-steps/stages (see 'Coaching sub-steps in sequence' in this section) and explains each phase as the demonstration progresses.

The learner is encouraged to ask questions and the coach uses questions too.

The coach might ask:

- "Can you remember what I did next?"
- "Why do you think it is important to do this before we do that?"
- "Why was it important I did what I just did?"

It is during this stage you would also:

- Incorporate underpinning knowledge – see next Section
- Name the parts, ingredients and other items being used
- Highlight any safety issues relating to the task
- Explain how this task fits in with other tasks the learner (or other staff) might have to undertake.

You do it with me

This is where the learner and the coach do the demonstration together.

This may occur with the coach and the learner each using their own piece of equipment (that is, the coach and the learner each have a piece of equipment, and they work 'in tandem') or it can be a joint effort with the coach and the learner combining to work on the one item, piece of equipment or set of items.

The learner is free to ask questions as they go and the coach provides whatever assistance is necessary.

The role of questioning plays a vital role during this phase too.

For example, if the learner had a question about 'what to do next', the coach could simply provide the answer to the question or they could elect to ask a question to get the learner to think through the situation and work out the answer for themselves. The coach might say:

- "What do *you* think might be the next step?"

  Or

- "If I said, think about the safety aspects of this job and try to recall what we said about the possibility of you losing a couple of fingers … would that help?"

Throughout this phase the coach must:

- Be alert to make sure the safety of the learner is never at risk
- Ensure the learner follows all the required steps. At this stage of their education, the learner is **not allowed** to take short cuts or make up their own mind about standards or the sequence of steps in the task
- Offer support and encouragement. Where the learner has done a correct step it is appropriate to offer some form of sincere praise (but not to overdo it). A simple "Good", "Yes", "Well done" or just an approving nod of the head should be enough
- Offer extra advice/coaching when the learner gets lost or stuck. This can be verbal advice, providing another demonstration or a mix of the two.

Then off you go

This is the last stage of the coaching where the coach provides the opportunity for the learner to practice their newly learned skill.

The opportunity for practice may be in the training room or on the floor in an actual workplace situation.

Usually, practice is also arranged with the learner's supervisor so they too can monitor what is being done and provide on the spot assistance when and if it is required.

The coach should check back with the learner (and/or the supervisor) periodically to see how things are going and determine whether:

- The learner needs more coaching
- The learner is ready to move on to their next coaching task.

Using handouts

Many coaching sessions can benefit from the use of 'handouts'.

Handouts are any printed or handwritten material given to the learner.

Handouts may be generated by you as the coach, or they can be photocopies of other relevant material. Examples of handouts can include:

- Company policies and procedures
- Manufacturer's instructions
- Recipe sheets
- Work instructions/Standard Operating Procedures
- Checklists
- Price lists
- Brochures
- Advertising material that the company uses to attract business.

Observing the learner practicing

When observing a colleague attempting or practicing their newly acquired skills, the following apply as guidelines:

- Effectively correct the learner whenever they take an incorrect step – corrective action needs to be immediate so incorrect practices are not allowed to become habits
- Ask questions to confirm the learner's knowledge. Effective coaching will ensure staff not only know what to do, but *why* they are doing it.

  For example, if the learner correctly performed a sequence of tasks it is still appropriate for the coach to say something like "Well done. Can you tell me *why* we turn the X valve off before we release the pressure?"

- Ensure the learner is always in comfortable surroundings. This may mean adjusting lighting and/or air conditioning and taking action to eliminate extraneous distractions. Sometimes comfortable surroundings may mean having music playing in the background and sometimes it may not
- Praise the learner when and where appropriate. Be lavish in your praise, but ensure it is genuine praise and is deserved.

  Too much unwarranted quickly becomes false and annoying
- Encourage the learner as much as possible. Learners may be anxious about the coaching so create an environment of success.

  If they get something right, it is appropriate to say a quick "Good", or "You're doing well".

  A smile or a nod of the head can do the same job in some circumstances
- Listen to the learner's feedback and act on it. If the learner is unhappy or uncomfortable with some aspect of the coaching, do whatever you can to remedy the situation in line with still achieving the coaching objective
- Pay attention. You must focus your attention on what the learner is doing and not get distracted (by phone calls, people walking past, calling in for a chat), or by doing other things such as completing paperwork, taking a delivery.

Coaching sub-steps in sequence

Any task to be coached must be broken down into its sub-steps, and then coached in sequential order.

This is one of the tasks the coach must prepare as part of their planning and preparation for the coaching session.

It requires you to write each sub-step down and into your coaching plan to ensure:

- No step is omitted
- Tasks are presented in the correct sequence.

It is not acceptable for a coach to believe they can remember all the sub-steps for a job or activity. They must be written down for reference if needed during the coaching session and/or to give to the learner for *their* future reference.

For example, to coach someone in making a cappuccino, the following sequence may have been identified:

- Select appropriate cup
- Select saucer
- Select teaspoon
- Position crockery and cutlery correctly on saucer
- Fill up a single cup espresso holder
- Tamp coffee granules
- Fit holder into espresso machine
- Depress single cup 1/3 cup button
- Wait for cup to fill with concentrated coffee to 1/3 mark
- Steam milk
- Fill cup with 1/3 steamed milk
- Scoop froth onto coffee for remaining 1/3
- Sprinkle froth with chocolate powder.

Note that the above information will not apply to all establishments producing cappuccinos – and nor should it. The intention is to write down only the way a cappuccino is made in this establishment and to use the names/terminology and practices this establishment uses.

Other premises might talk about group handles, ‘texturing’ the milk (instead of ‘frothing’) or filling the cup to different levels but at this establishment, the above information is what happens.

Remember, if the accepted or standard operating procedure in the workplace is different from what the ‘textbooks’ say, then the coaching must follow the workplace practice (providing safety is ensured). Coaching should never train people in what should be done only for them to find out that in practice something else happens in the real world of their workplace.

2.3 Communicate clearly any underpinning knowledge required

Introduction

Underpinning knowledge refers to the essential knowledge required to carry out tasks or perform skills effectively, legally and as required by the establishment.

All tasks where there is a need for coaching will have some level of underpinning knowledge associated with it.

As a coach, not only must you be competent in the task you are demonstrating, but you must also be knowledgeable about the underpinning knowledge required for that task.

Communicate clearly any underpinning knowledge required

Depending on the task being coached, underpinning knowledge can include:

- Knowledge of processes and procedures, principles and practices – including theory underpinning technical skills
- Communication skills that contribute to production and harmonious relations between employees and customers
- Teamwork skills, contributing to productive working relationships and outcomes
- Planning and organising skills that contribute to long-term and short-term strategic planning
- Self-management skills, contributing to employee satisfaction and growth
- Learning skills helping to contribute to ongoing improvement and expansion in employee and company operations and outcomes
- Technology skills that contribute to effective execution of tasks
- Ingredients in a dish or drink, including information on how those ingredients need to be stored, where they are stored and indicators of quality for each ingredient
- Components of a piece of equipment, including indicators something is wearing out and needs replacing, and how to undertake basic maintenance
- Product knowledge and/or knowledge relating to the services the venue offers such as trading hours, discount rates available, which credit cards are accepted, whether or not there are home deliveries. This list is virtually endless
- The range of principles underscoring skills such as selling, so practice may be based on sound theory, and so certain acknowledged and accepted strategies can be applied at appropriate times.

- Reasons for undertaking tasks so staff understand not only *what* they are doing, but also *why* they are doing it.

  This makes it more likely staff can modify behaviour and practice as circumstances alter and as situations dictate, rather than blindly continue to deliver the same service to all customers when the situation obviously requires a variation to standard practice

- Legislative requirements, so staff function responsibly and within the letter and spirit of the various laws applying to the industry. Major concerns in this regard (depending on the venue) include OHS, liquor licensing, food safety and gaming as well as the common law 'duty of care' provisions.

2.4 Check the colleague's understanding

Introduction

It is a standard requirement throughout all coaching sessions that you focus effort on checking and determining the level of understanding the learner has in relation to the task being coached.

This applies whether the topic is a knowledge-based one, attitudinal or skill-based.

Another look at the role of questions in coaching

During a coaching session, it may be necessary for the coach to ask the learner questions to confirm their knowledge of a specific task. Indeed, as earlier stated, the effective coach will ask many, many questions.

The type of questions that can be asked will vary according to the type of coaching session being conducted.

It is advisable to prepare these questions as part of the planning phase of the coaching, rather than rely on your ability to think of and remember to ask appropriate questions during the coaching session.

Examples of such questions may include safety and health issues like:

- Why is it important not to touch the steam wand of the cappuccino machine?
- Why is it important to check glassware before it is used?
- When and why should you refer to the manufacturer's instruction manual about how to operate a piece of equipment?
- Why must we always refer to the current schedule before making a quote?

Questions could also relate to seeking underpinning knowledge about products, such as:

- Who makes XYZ liqueur?
- What brand of coffee do we serve?
- What is the price of a trip to ABC?
- What procedure do you follow when changing a cash drawer?
- In which book or file do you record deposits paid?

Sometimes, when attempting to determine the existing level of underpinning skills and/or knowledge a staff member has, the coach may approach a supervisor and ask their opinion.

Alternatively, or in addition, the coach may ask the staff member to bring along evidence they have previously completed a course or received some other experience via training or life experience.

Checking colleague's understanding

At various stages throughout a coaching session you should ask the learner questions confirming or determining their understanding of a particular task.

The reason for this is to seek verbal and/or visual confirmation of understanding. Checking for understanding is important because the learner may not have fully understood what you showed them.

The learner may have been anxious and unable to concentrate properly, they may have just had a momentary lapse of concentration, they may have been distracted by something, they may have been trying to assimilate an earlier item and missed the next one, or there could have been a noise that prevented them hearing what you said.

It is therefore essential to seek confirmation at regular intervals throughout the coaching session to make sure all information provided by you has been accurately received by the staff member, and received in the right context and to ensure it is appropriate to move on to the next step/stage of the coaching.

The two-way nature of communication

Always remember communication is two-way thing: there is a sender and a receiver. For communication to be effective, the receiver must accurately interpret the sender's message and provide feedback to it.

To check if information has been received accurately, coaches commonly use more 'open' questions than 'closed' questions to obtain feedback.

Open questions require more lengthy answers than 'closed' questions, which require a simple 'Yes' or 'No' response , or a very short reply.

Open questions start with:

- Who? - Who do you report equipment failures to?
- What? - What is the purpose of our guarantee?
- When? - When should you switch off in-room air conditioning?
- Where? - Where do you store the travel vouchers?
- How? - How do you greet a customer?

2.5 Provide the colleague the opportunity to practice the skill and ask questions

Introduction

All coaching sessions should provide an opportunity for the learner to practice their newly found skills.

This opportunity should include:

- Opportunity within the coaching session as part of the coaching provided
- Opportunity *after* the coaching session has finished in the workplace under your supervision, the supervision of another staff member or under the supervision of a supervisor.

Providing the opportunity to practice

Any new skills shown to the learner may be quickly lost if there is no opportunity for the learner to put those skills into practice.

Do not believe once you have shown the learner what to do, the job of coaching is finished – far from it!

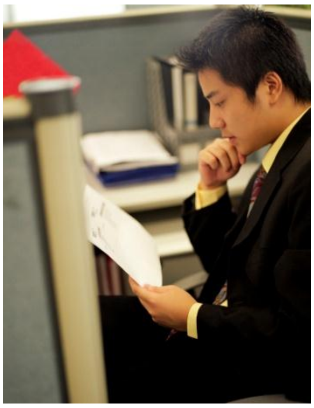
While the colleague practices, you must:

- Watch to ensure they are doing the task correctly. This means they are working safely, doing sub-tasks in the correct sequence, not wasting effort, time or product
- Provide further information. This information is sometimes known as the 'nice to know' information, or the 'could know' information. The vital information is called the 'must know' information and should be presented as part of the demonstration you did initially)
- Be ready to demonstrate again a step where and when necessary
- Encourage, praise and congratulate.

While watching the learner practice it is also appropriate to ask them questions to assess their level of understanding or underpinning knowledge.

Remember some employees become embarrassed easily, so all feedback (especially feedback with a negative element) should be done in an appropriate location away from other staff members and members of the public.

Encouraging the learner to ask questions



Some learners are reluctant to ask questions.

There can be several reasons for this:

- They may feel it indicates their ignorance
- They may not want to ask what they feel is a stupid question
- They may not want to waste your time.

Ways to overcome this possibility are to:

- Regularly ask the learner if they have any questions and then pause long enough for them to ask a question.

  There's no point asking if they have a question and then rushing on to the next topic or point without giving them an opportunity to actually ask a question
- Ask lots of questions yourself. This legitimises the use of questions in the coaching context and, if the learner is not asking any or many, it gives you the opportunity of trying to determine their actual level of understanding and/or knowledge
- Congratulate the learner on their question. This must be done appropriately to avoid it seeming false.

  You might simply say "Good question. It shows you're thinking about XYZ. That's good"
- Generate an answer to the question – note we have not said 'answer' the question.

  If the learner asks a question it is vital it gets answered but this does not mean you have to supply the answer.

  Part of the learning process can be for the learner to think the question through themselves and come up with an answer you will either confirm or modify.

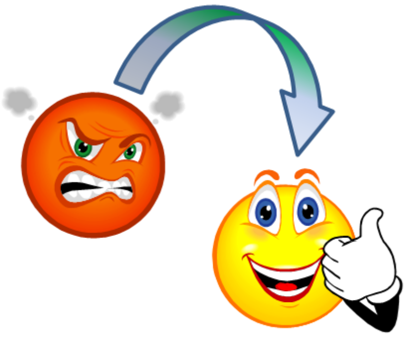
  For example, when asked a question you could:

  - Re-word the question and ask the question back to the learner
  - Give them a hint and then ask them what they think the answer might be
  - Tell them the answer – this option should not be your only response when learners ask questions.

2.6 Provide feedback in a constructive and supportive manner

Introduction

Not only must all coaching be conducted positively and in an encouraging fashion but supportive and constructive feedback must also be given.



Such an approach encourages the learner to try harder and assists in creating an environment conducive to learning.

This will inspire more determination to achieve the final goal.

The anxiety of learners

Commonly learners are anxious about their progress and they are usually seeking answers to questions such as:

- "How am I going?"
- "Am I on the right track?"
- "Is what I am doing OK?"

Many learners will not actually talk about these concerns but it is usual they are *thinking* them.

The effective coach will set their mind at ease by supplying appropriate answers to the unstated questions on a regular basis.

Basics of feedback

It is useful to bear the following in mind when considering the use of feedback in coaching. Feedback refers to:

- Guiding the person being coached
- Being a core part of coaching sessions
- Being constructive so the person being coached feels encouraged and motivated to improve their practice
- Being timely so the person being coached can use the feedback to guide practice
- Being linked to a clear statement of orderly progression of learning so the person being coached has a clear indication of how to improve their performance. This provides a developmental approach for achievement of a certain skills set
- Being specific to the learning outcomes of the coaching session so assessment is clearly linked to learning
- Guiding people to become independent learners and their own critics.

Providing feedback

The support and feedback can be communicated either by verbal or non-verbal communication.

Verbal communication

This is communication spoken to the learner, for example: "You're doing a great job, Tony. Now would you like to try including some workplace statistics?"

Keys in giving verbal feedback are:

- Keep it brief
- Keep it relevant
- Keep it genuine
- Make sure it is warranted.

Beware!

While speaking with a learner during a coaching session remember to avoid phrases which, on the surface, sound encouraging but which can be counter-productive.

For example, you may wish to indicate a certain task is relatively easy so you say "You'll learn this quickly – it's child's play, really!"

Your genuine intention is to set the learner's mind at ease, and to facilitate their learning by attempting to remove the thought that the task is difficult: this is very commendable.

However, if the learner was then unable to learn the task quickly, what have you just said?

In effect, you have told them they are more incompetent than a child.

The above example highlights the need for coaches to be extremely alert to giving *unintentional* negative feedback, and the very real need for them to think before talking.

Delivering negative feedback

It is a fact of life when coaching that there will be times when you need to provide negative feedback to a learner.

In reality you have an obligation to do this where it is called for. You would not be doing your job if you failed to give legitimate negative feedback.

However, there is a need for you to pass on such comments in a sensitive and supportive fashion.

This can be done by using a 'positive-negative-positive' sandwich.

This means you begin your feedback by mentioning something the learner is doing well, follow it with the negative feedback, and then finish the communication on a positive note by making reference to something else you are pleased with.

This approach still gets the negative message across but is sensitive because it allows the learner to know you are happy with other aspects of what they are doing.

An example of the use of a 'positive-negative-positive' sandwich is:

"Jim, I think you are going really well with the new cocktails. I was especially impressed with that new cocktail you created the other day. I think it'll be a winner.

I just need you to focus a bit more though on the wastage angle. I think we're wasting just a bit too much product when we mix the drinks and that will really bite into the bottom line.

But overall you're doing great – your presentation and garnishing are outstanding."

The above illustrates how the coach can let Jim know he needs to stop wasting product but does it in such a way Jim is left positive about the negative feedback because the coach has acknowledged some of the other good work he has done.

Note the use of the 'we' in the feedback also helps to de-personalise the feedback.

Non-verbal communication

This is communication via body language.

Coaches have to pay special attention to their body language to avoid sending unintentional negative messages to their learners.

For example, when observing a learner you might find yourself frowning, shaking your head, drumming your fingers or giving off 'negative' signals in some other way.

These negative signals will interfere with the learning process and are to be avoided.

In addition, because most people believe body language above verbal language, you must be careful about what messages your body language is sending.

There is no point verbally telling a learner you are happy with their progress when your non-verbal signals indicate frustration, anger, disapproval or dissatisfaction.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 To meet the requirements of the Work Project you are required to provide written, video, photographic or other evidence you have coached a colleague on the job and:

- Explained the need and purpose of the coaching to them
- Prepared for the coaching by arranging the location and necessary resources/materials
- Explained and demonstrated the required skills
- Communicated necessary underpinning knowledge as part of the coaching process
- Checked understanding of the person being coached throughout the coaching process
- Provided opportunity for colleague to practice
- Provided feedback to the learner throughout the session.

Summary

Coach colleagues on-the-job

When coaching colleagues on the job:

- Explain the need and/or reason for coaching to the learner at the outset
- Gain agreement coaching is a legitimate way to address identified need
- Develop a relationship with the learner
- Demonstrate skills using the ‘I do it normal, I do it slow, You do it with me, Then off you go’ approach
- Provide explanation and underpinning knowledge as required
- Use questions to assist learning and check for understanding
- Support demonstrations with handouts
- Provide opportunity for learner to practice skills learned
- Ensure all coaching sessions align with company policies, safety requirements and actual workplace practice
- Observe the learner and provide encouragement, support and feedback
- Provide opportunity for application of skills and knowledge learned
- Provide constructive and supportive feedback.

Element 3:
Follow up coaching

3.1 Monitor progress with new skills in the workplace and provide supportive assistance as required

Introduction

People learn at different rates and it is usual for coaches to have to follow up on their coaching by monitoring the progress of those they have coached.

Where monitoring indicates the learner requires more help, the coach is responsible for providing this, or for arranging it to be provided.

Monitoring progress

Coaching does not always finish at the end of the coaching session.

Most coaching continues until the point where the learner has achieved, and can confidently display the required level of competency for the task being taught.

Frequently, achieving competency cannot always be reached in the time allocated to a coaching session because there is generally a need for the learner to practice.

Practice should always be monitored to ensure the learner is performing as required, and not learning bad habits.

Practice without supervision, or monitoring, is really not practice.

You must monitor the practice and be ready to correct where required, add further information or detail if asked for, and praise where appropriate.

Monitoring may entail:

- Completing coaching checklists to ensure all learning outcomes/competency standards have been achieved. Using standard checklists ensures all learners are coached to the same standard and coaching is uniform
- Questioning the learner to verify underpinning skills and knowledge and to evaluate the level of understanding of certain aspects
- Visual observation. Watching the learner perform a task to verify their competence
- Checking, for example, improvement in sales figures or improvement in service speed – using a measurable indicator to assess the workplace impact of the coaching to demonstrate the coaching has achieved its intended outcome
- Utilising a number of assessment tools. This may involve (in addition to demonstrations and verbal questions) the application of written questions, the use of case studies, practical exercises, role plays, or assignments to judge whether or not the learner has achieved the competency level required.

Why is monitoring the progress of learners important?

Monitoring is undertaken to identify:

- The progress of the person being coached
- If changes to content of coaching sessions need to be made
- Changes to coaching processes that need to be made.

Further points to note when monitoring learner progress

Your monitoring of the learner must be friendly and genuine.

You must strive to continue the supportive environment created during the initial coaching phase.

When monitoring, you must also strive to be:

- Fair – all learners should be treated the same.

  Never play favourites. Do not be harder on some than you are on others. Do not favour males over females or vice versa.

  Never be harder on older people than younger ones.

  Do not favour people from a certain race or religion

- Accurate – watch for and record workplace performance of learners accurately.

  What you record must genuinely reflect what the learner can do

- Understanding. It is important your monitoring takes into account the limitations individual learners are experiencing.

  For example, one learner may have lots of out of work activities or lots of extra work-related responsibilities limiting the amount of practice they can do and hence this will affect the rate at which they might achieve competency.

  Coaches should also appreciate some people just have problems with some learning tasks. They might be brilliant at everything else except this one task so extra patience and understanding is called for

- Unbiased. It is said workplace coaches occupy a powerful position because they are able to influence a person's progress within the organisation.

  Management will often speak to coaches about the potential a learner is displaying and their readiness for extra duties/responsibilities or promotion.

  The feedback provided by the coach must therefore be fact-based and not founded on prejudices, favouritism or lies.

  This means if a person is good, you are obliged to say so.

  Similarly, if they are not suitable you have an obligation to say so too but making sure you use specific examples to illustrate your opinion.

  Management will not appreciate you recommending an unsatisfactory or unsuitable person for promotion, and it certainly will not reflect well on *your* ability to select 'good' staff.

- Consistent – monitoring of learners should be regular in nature.

  Sometimes monitoring activities can be organised but frequently they are not.

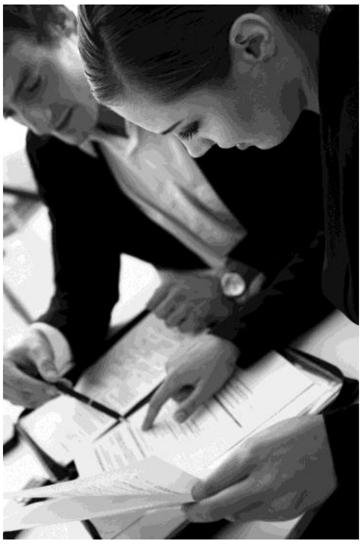
  Central to this is the issue of fairness. You must ensure the number of times you monitor one learner is not significantly different to the number of times you monitor another learner or you run the risk of one person feeling they are being picked on

- Relevant. The monitoring should be relevant to the skills which were the basis of the coaching sessions.

  Monitoring other aspects of a learner's work may give the impression you are checking up on them. Stick only to the topic of the coaching as the basis for the monitoring. This may mean your monitoring of a learner has to occur at a certain time during their shift when they are performing a nominated task.

Providing supportive assistance

A coach must remember individual staff members come to coaching with widely different experiences and expectations. No two people are the same, and no two people learn in exactly the same way.



As a result, one learner may grasp a concept or pick up a skill quite quickly, where another may struggle or take longer.

This necessitates the coach being patient, tolerant and understanding, while in addition they must be flexible in their delivery and encouraging in their support.

Flexibility in delivery is essential as it enables the coach to cater for individual differences among staff.

This means coaches must get to know their learners/staff and use the best coaching method as appropriate for each individual staff member.

For example:

- Some staff will learn better by watching
- Some will learn better by doing
- Some learners prefer learning by reading
- Some prefer to listen
- Others will learn better if they learn on their own, while others will learn better if they are in a group
- Some prefer lots of attention, while others prefer to learn on their own.

An effective coach will match their delivery technique to the learning style of the learner. This again indicates why a coaching plan is useful because it 'forces' the coach to plan their coaching delivery to suit the needs of every individual learner they have to deal with.

This approach avoids the highly ineffective 'one size fits all' approach to coaching.

Keys in providing supportive assistance

The coach should:

- Be accessible to the learner. Coaches should be prepared to be available when the learner needs to talk, needs help, needs support, needs more information
- Be non-judgemental. The coach should be a source of encouragement and support, not a person who makes judgement calls to the learner about their competency, potential or capacity
- Maintain confidentiality. What is said between the learner and the coach should stay private
- Avoid giving the learner the impression they are intruding or interrupting. The coach should welcome the learner's approaches and avoid giving the impression they are rushing their dealings with the learner.

3.2 Report progress to the appropriate person as required

Introduction

Progress on coaching may be reported in a formal or informal manner.

The precise method used in each instance will depend on the particular establishment's policies and procedures, but reporting is either verbal, written or a combination of the two.

Who might receive a report?

Coaching results may have to be reported to a number of people.

Naturally the staff member who is being coached should be supplied with an honest and comprehensive report of their coaching and/or assessment.

In addition you may be required to report to:

- Management and/or the owners of the business
- The HR Department – because the learner's remuneration may be linked to their capacity to demonstrate competency
- Head Office – for their records which may be used to identify staff who are eligible for promotion, further training, extra responsibilities, higher duties
- The supervisor in the area where the learner works – so they can get feedback about their skill levels, potential, commitment.

How often might the report be needed?

There is a wide variation of possibilities in reporting frequency.

Most establishments encourage 'regular' verbal reports on learner progress so this may be an almost daily chat with someone, just for a minute or two, about how they are progressing.

Written reports are usually required less frequently and may be needed:

- Weekly or monthly
- On completion of the coaching – that is, when you are confident the learner has achieved the required competencies
- For nominated staff or management meetings – where there can be a need for coaches to present a report on who they are coaching, and how those learners are progressing.

Why are these reports required?

These in-house progress reports can be very useful management tools in a variety of ways, some of which include:

- Checking overall skill levels of staff. This entails keeping a current inventory of all in-house staff skills.

  This can be referred to when there is a need to move staff around internally to respond to extra demand, staff absenteeism or unpredictable issues
- Recording extra coaching/training required. Reports are really records and these can be used to help coaches (and other staff within the organisation) identify, and remember for future use, the top-up coaching/training required by individual staff members
- Identifying those who appear appropriate for future skill development. Records can serve to identify future training/coaching needs for individuals, individual departments, and the enterprise as a whole.

  A prime role of these records is to flag for attention certain staff who appear to have an aptitude for certain work, and/or to identify those who seem to have management potential
- Providing a reference for promoting employees. Success with learning can be beneficial for an employee's promotional prospects
- Amending employee's staffing record. As staff increase their skill sets their employee records should be updated to reflect their increased value to the organisation.

  This increased skill level *may* be linked to increases in remuneration but is commonly taken into consideration when the business is looking to promote someone within the organisation to the next level of responsibility
- Compiling statistical records. Many establishments like to record details about the number of staff coached in a given period, how much time was spent on coaching and how much money was allocated to it.

3.3 Identify performance problems or difficulties with the coaching and rectify them or refer them to the appropriate person for follow-up

Introduction

At the end of every coaching session, the coach should review the session.

This review should aim to determine how effective the session had been with a view to improving future sessions.

Even coaches can learn if they take the time to look for the signs, and the feedback.

Identifying performance problems or difficulties

Performance problems or difficulties may be identified as a result of:

- Feedback from customers regarding their levels of satisfaction or dissatisfaction with products and services
- Feedback from supervisors about the performance of individual staff
- Observation of work performance
- Performance appraisals conducted in the workplace.

The role of evaluation

Many coaches make notes and document how the coaching could have been improved at the completion of each coaching session.

Effective coaches take this evaluation phase very seriously, recognising its potential for improving future coaching sessions.

In fact, until a review has been done, the coaching session cannot be truly seen to be complete.

This illustrates there are really three stages to any coaching session:

- Planning of the session
- Delivery of the session
- Evaluation of the session.

What's involved?

Not only should the coach monitor the coaching session, looking for things that created or caused problems or impeded learning but also looking for techniques which appeared to work well or be particularly effective with a learner.

The coach should also ask for the learner's feedback on the coaching session and this feedback should be taken seriously and constructively.

Remember, *everyone* learns at a coaching session, the coach included.

Just because you are the coach does not mean you cannot learn too – especially about the way you deliver your coaching and about the person you are coaching.

Where problems with coaching are identified, every effort must be made to remove them from the next coaching session.

A coach who knows there is a potential problem and fails to take action to eliminate or reduce the impact of that problem is simply lazy and unprofessional. He/she will quickly gain a reputation in the workplace for being just that.

How can I tell there's a problem? What should I look for?

As a coach you must be alert to signs that coaching has not been effective.

Performance problems or difficulties may be due to:

- Shyness or lack of confidence – where the learner is worried or anxious about their ability to cope with the coaching sessions and/or to be able to achieve the required competency or standards
- A breakdown in communication – where the coach may be sending mixed messages (such as a non-alignment between verbal and non-verbal communication).

  Problems may also be caused by:

  - The coach using trade terminology not properly explained
  - The coach allowing other issues to take priority over the delivery of coaching
  - The learner misinterpreting a message sent by the trainer which causes a barrier to future learning
- Language or cultural barriers – where there is a spoken language difficulty or the coach has unintentionally given unintended cultural offence by something they have said or done
- Insufficient opportunity to practice – where the coach has failed to arrange for the practice sessions or where the opportunity (and the tools, the time, the pressure) to practice has not matched the real needs of the learner
- An inappropriate environment for coaching. This can include situations where there are members of the public present causing anxiety, too many other staff present, or situations where it is too hot, too cold, too noisy or too sunny.

Possible causes of problems

The above problems can nearly always be traced back to one or more of the following reasons:

- Poor, insufficient or rushed preparation. Good, solid preparation is the key to effective coaching
- Time restraints. Rushed coaching will rarely be effective
- Communication barriers. Anything that gets in the way of the messages being sent in the coaching session is likely to cause problems (including interruptions from outside sources)
- Uncomfortable surroundings making the learner feel uncomfortable and unable to properly concentrate
- Inappropriate learning tools. For example, if you are coaching someone on how to use a cash register/POS terminal it really needs to be the same type of register/terminal they are using in their day to day work
- Broken, dangerous or faulty equipment. Never use dangerous or unsafe equipment
- Unmotivated learners. You must remember:
  - Not all learners are as motivated as you in relation to what it is they need to know or be able to do
  - It is without exception *your responsibility* to motivate your learners.

    This can be difficult to do in some cases but it needs to be clearly stated that it is your job to get the learners to a stage where they are, if not eager to learn, they are at least willing to learn.

    Again, how you intend to achieve this is often recorded on the coaching plan.

    Motivation may be encouraged by:

    – Telling a short story or anecdote illustrating the need for the coaching which is about to occur
    – Doing a brief demonstration of what can happen when things go wrong
    – Reading out a media article relating to the topic
    – Mentioning relevant statistics demonstrating the need for the coaching (such as injury statistics, wastage figures, money spent by the venue on raw materials).
- Insufficient stock, items or products to complete coaching session. It is the coach's job to make sure there is enough of everything to allow the coaching session to be completed as intended
- Poor levels of attendance. Where learners have a tendency not to attend for arranged coaching sessions this is usually an indication they are unhappy with some aspect of what you are doing.

  They may be unhappy with your coaching style or the way you deliver the coaching but a common cause of problems in this area relates to interpersonal skills.

  Learners may find you are being too 'forceful', they may not find it funny when you make jokes or they may have taken offence at a comment you made which you thought was funny.

  The final thing to consider when levels of attendance are poor is whether or not the learner has other commitments at that time.

The need to act on the basis of reviews

Coaches must realise reviews or evaluations are only useful if acted upon.

Once a problem or difficulty has been identified, it must be addressed.

There is little point in taking the time and trouble to obtain feedback if it is ignored.

If the review identifies lack of equipment is an issue, then more equipment must be obtained.

If the review shows your delivery style is annoying, ineffective or disliked then it has to be changed.

In some cases, the coach alone is able to take action to rectify the problem, while in other cases, there will be a need to involve others who may control rosters, resources or knowledge.

If you are unsure about what action to take in relation to a person you are coaching, the best approach might be to discuss the situation with them to try to work out a mutually acceptable and agreeable solution.

Referring to other people for follow-up

Where you are genuinely unable to fix a coaching-related problem (and this can include a problem relating to the delivery of coaching, assessment of the competency of a learner, materials needed to undertake the coaching, time release for staff to attend coaching sessions) there is a need to refer this situation to the 'appropriate' person.

Exactly who is the appropriate person will depend on the nature of the problem – obviously you need to refer the issue to someone who has the authority to act on your behalf.

For example, coaches often have problems with supervisors refusing to release staff from normal duties to undertake training so this problem may need to be referred to the manager (after having, of course, tried to resolve the issue with the supervisor one on one).

The 'appropriate person' may be:

- Duty manager
- Office manager
- Branch manager
- Owner
- Department manager
- Section manager
- Someone at head office who has authority for spending money or obtaining resources for training/coaching.

Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Note: this Work Project follows from and builds on Work Project 1.1 and 2.1.

3.1 To meet the requirements of the Work Project you are required to provide written, video, photographic or other evidence you have followed up after a coaching session for a colleague on the job and:

- Monitored their on the job progress in relation to the skill that was coached
- Provided additional help as required to supplement the coaching
- Liaised with others to monitor and support the learner's on the job practice
- Reported progress to others in the workplace as required or necessary
- Reviewed or evaluated the coaching provided to the colleague to learn lessons for future reference
- Determined if the learner was experiencing problems and/or difficulties with the skill in which they were coached
- Addressed identified learner problems and/or difficulties effectively and in a timely manner.

Summary

Follow up coaching

When following up coaching:

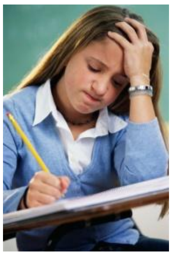
- Monitor progress of learner in the workplace
- Involve other staff, supervisors and customers in the monitoring process
- Use a variety of ways to monitor learner progress
- Be supportive, fair, accurate, unbiased, understanding, consistent and relevant
- Maintain confidentiality
- Report learner progress as required to those who need to know
- Be alert to the possibility the learner may have problems or difficulties and take action to identify them
- Respond promptly and appropriately to identified learner problems or difficulties – never ignore them
- Accept coaching has not finished until an evaluation or review has been undertaken.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



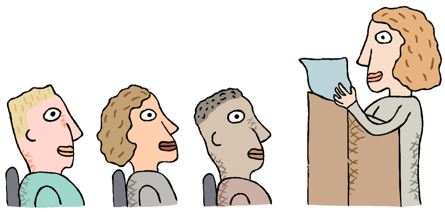
Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:



- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.

Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	*Humankind*
Barman/maid	*Bar attendant*
Host/hostess	*Host*
Waiter/waitress	*Waiter or waiting staff*

Recommended reading

Arnold, J., 2009, *Coaching skills for leaders in the workplace: how to develop, motivate and get the best from your staff*, How To, Oxford

Ashdown, N, 2010, *Bring out their best: inspiring a coaching culture in your workplace*, Australian Leadership Publishing, Box Hill, Victoria

Carter, E. & MacMahon, F., 2005, *Improving employee performance through workplace coaching: a practical guide to performance management*, Kogan Page, Sterling, VA

Clutterbuck, D., 2007, *Coaching the team at work*, Nicholas Brealey International, London; Boston

Creswell, J., 2008, *The complete idiot's guide for coaching for excellence*, Alpha, New York

DuBrin, A.J., 2005, *Coaching and mentoring skills*, Pearson/Prentice Hall, Upper Saddle River, N.J

Dwyer, J., 2006, *Develop teams and individuals*, McGraw-Hill, North Ryde, N.S.W

Feldman, D.A., 2001, *The manager's pocket guide to workplace coaching*, HRD Press, Amherst, Mass

Gilbert, A. & Whittleworth, K., 2009, *The OSCAR coaching model: simplifying workplace coaching*, Worth Consulting Ltd, Monmouth

Oberstein, S., 2009, *10 steps to successful coaching*, ASTD Press, Alexandria, VA

Passmore, J., 2008, *Diversity in coaching: working with gender, culture, race and age*, Kogan page, Philadelphia; London

Ramsay, J., 2004, *Coaching for performance improvement*, University Press of America, Dallas

Somers, M., 2008, *Coaching*, Hodder Education, London

Starr, J., 2012 (2nd ed'n), *Brilliant coaching: how to be a brilliant coach in your workplace*, Prentice hall, Harlow

Thornton, C., 2010, *Group and team coaching: the essential guide*, Routledge, London; New York

Whitmore, J. (Sir), 2002 (3rd ed'n), *Coaching for performance: GROWing people, performance and purpose*, Nicholas Brealey, London; Naperville, U.S.A

Whitmore, J. (Sir), 2009 (4th ed'n), *Coaching for performance: GROWing human potential and purpose: the principles and practice of coaching and leadership*, Nicholas Brealey, Boston

Wilson, C., 2011, *Best practice in performance coaching: a handbook for leaders, coaches, HR professionals and organisations*, Kogan Page, London; Philadelphia

Trainee evaluation sheet

Coach others in job skills

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	☐	☐	☐	☐
Most of the competency seemed relevant to me.	☐	☐	☐	☐
The competency was at the right level for me.	☐	☐	☐	☐
I got enough help from my trainer.	☐	☐	☐	☐
The amount of activities was sufficient.	☐	☐	☐	☐
The competency allowed me to use my own initiative.	☐	☐	☐	☐
My training was well-organised.	☐	☐	☐	☐
My trainer had time to answer my questions.	☐	☐	☐	☐
I understood how I was going to be assessed.	☐	☐	☐	☐
I was given enough time to practice.	☐	☐	☐	☐
My trainer feedback was useful.	☐	☐	☐	☐
Enough equipment was available and it worked well.	☐	☐	☐	☐
The activities were too hard for me.	☐	☐	☐	☐

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:

Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

Coach others in job skills

		Yes	No*
Element 1: Prepare for on-the-job coaching			
1.1	Identify the need for coaching based on a range of factors	☐	☐
1.2	Identify skill deficiencies that could be addressed by coaching needs through discussion with the colleague to be coached	☐	☐
1.3	Organise with colleague a suitable time and place to conduct coaching in accordance with enterprise policy	☐	☐
Element 2: Coach colleagues on-the-job			
2.1	Explain to the colleague the overall purpose of coaching	☐	☐
2.2	Explain and demonstrate the specific skills to be coached	☐	☐
2.3	Communicate clearly any underpinning knowledge required	☐	☐
2.4	Check the colleague's understanding	☐	☐
2.5	Provide the colleague the opportunity to practice the skill and ask questions	☐	☐
2.6	Provide feedback in a constructive and supportive manner	☐	☐
Element 3: Follow up coaching			
3.1	Monitor progress with new skills in the workplace and provide supportive assistance as required	☐	☐
3.2	Report progress to the appropriate person as required	☐	☐
3.3	Identify performance problems or difficulties with the coaching and rectify them or refer them to the appropriate person for follow-up	☐	☐

Statement by Trainee:

I believe I am ready to be assessed on the following as indicated above:

Signed: ______________________________ **Date:** ____________

Note:

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.

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