

# Worksheets Management Coaching



Collection of all the  
Course Worksheets

# **Importance of a Coach, *Your Personal Experience***

**Someone in your professional or personal life might had a big influence on you and your development. Think about one person that you could consider as your coach**

Now answer the questions and explain how this person's coaching helped you.

1. Who was this coach, exactly? What was the significance of this individual in your life?
  
  
  
  
2. What was it that this individual helped you accomplish that you couldn't have done without his or her guidance?
  
  
  
  
3. What did this individual say or do to help you? Consider what he or she said or the actions he or she took that made him or her an excellent coach.
  
  
  
  
4. What things did you learn from this individual that you are applying or want to use in your current work?

# How Good Are Your Coaching Skills?

## Instructions:

This evaluation is intended to help you learn more about your coaching effectiveness and identify the behaviors you already use and where you need to improve your abilities.

## How often do you show these kinds of behaviors?

Decide on a rating for each statement.

- 1 Almost never
- 2 Occasionally
- 3 Frequently
- 4 Very frequently
- 5 Almost always

Question	Rating
1. Listen to and understand what the needs, issues, and concerns of your employees are.	1 2 3 4 5
2. Work together to establish goals and create a clear plan for achieving coaching goals.	1 2 3 4 5
3. Assist thinking through complicated issues	1 2 3 4 5
4. Make certain they understand how you will support them. 5	1 2 3 4 5
5. Wait to give suggestions until he/ she is open to discussing what you have to say.	1 2 3 4 5
6. Commit the time needed to coaching.	1 2 3 4 5
7. Help to determine strengths and shortcomings.	1 2 3 4 5
8. Show how their performance affects the whole unit, even the bottom line.	1 2 3 4 5

<b>Question</b>	<b>Rating</b>
9. Help see missteps as learning opportunities to do things much better.	1 2 3 4 5
10. Let them know you have confidence in what he/she can do.	1 2 3 4 5
11. Tell someone about your experience.	1 2 3 4 5
12. Avoid distractions when coaching others.	1 2 3 4 5
13. Explain your reasoning when advising what he/she should do to resolve the issue.	1 2 3 4 5
14. Discuss professional and career goals.	1 2 3 4 5
15. Offer lots of time to express their thoughts when addressing performance improvement.	1 2 3 4 5
16. Say you believe he/she can take performance to the next level.	1 2 3 4 5
17. Offer specific ideas or suggestions during a coaching session.	1 2 3 4 5
18. Pay attention to what he or she needs right now	1 2 3 4 5

## **Assessment Scores:**

**90-77:** Your results suggest that you possess strong coaching abilities.

**76-63:** Your scores indicate you have good coaching skills. Examine your results and look for any similarities in the questions where you received a 3 or less.

**62-46:** Your score suggests that you should work on improving your coaching. There are various areas where you should concentrate your efforts in order to progress. Consider the areas of coaching that you find the most challenging. This will help you decide which areas to concentrate on.

### **Below 45:**

*You need to make significant improvements in your approach to coaching. It's probable that you find coaching tough, or that you don't have much*

# How good at Coaching in the workplace are you already?

This is a list of personal characteristics that demonstrate your readiness to begin your coaching function. As you answer the questions and become more aware of what you can do as a coach, you will become more confident in yourself.

**Read the statements** and circle if you:

- Agree – Undecided – Disagree with it
- Give an example or explanation if possible

Statement	Example
I possess information that I am willing to make available to others.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree
I've had some success instructing others.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree
I have the capacity to assist others in achieving their goals.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree
I've been able to assist others in thinking through a situation they're facing.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree
I am a good listener.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree
I have the capacity to provide sound advice to others.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree

Statement		Example
I can motivate people to achieve their goals.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree	
It makes me happy to watch others achieve.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree	
I want to be a good coach.	<input type="checkbox"/> Agree <input type="checkbox"/> Undecided <input type="checkbox"/> Disagree	

### What was the total number of statements you checked?

If you ticked at least half of these boxes with Agree, you already have several assets that masterful coaches need.

# Identify and Create your Coaching Objectives

## Instructions:

Fill in the blanks with your answers to the following questions. They will assist you in developing your coaching objectives.

**1. Make a statement** explaining the things you and your team must do in the following six to twelve months. Think about the most pressing business challenges.

**2. Identify** three or four actions that the team should do to address the challenge

**3. What do you consider to be **your Coaching Strengths?****

**4. What do you have to offer that is **different from the others?****

**5. What are some things **you know that others should know?****

**6. How can you use coaching to help your employees deal with** the business challenges and reach the business objectives you want them to? (Coaching Objectives)

# Build Team Coaching Profile

## Instructions:

The purpose of making a coaching profile of your team is to discover the members of your team who you want to keep the most. Consider the 10 traits of valuable employees.

1. Hard-to-replace specialized knowledge or abilities
2. Outstanding leadership abilities
3. Consistently outstanding performances
4. Employees with extensive experience
5. People with cutting-edge skills
6. People who have a lot of loyalty and good morale
7. Employees with a great deal of knowledge about your business or industry
8. A large client base or strong customer relationships
9. A good fit for the culture and a good example of core values.
10. The departure will impact the departure of other important personnel.

There are four categories: Place each employee in the one that most accurately defines his or her contribution.

**1. The must-have individuals** These are your celebrities, they constantly do well. (More than 5 characteristics)

**2. Individuals who excel** These people are excellent performers, they are valuable members of your team that continuously go above and beyond. (At least three of the characteristics)

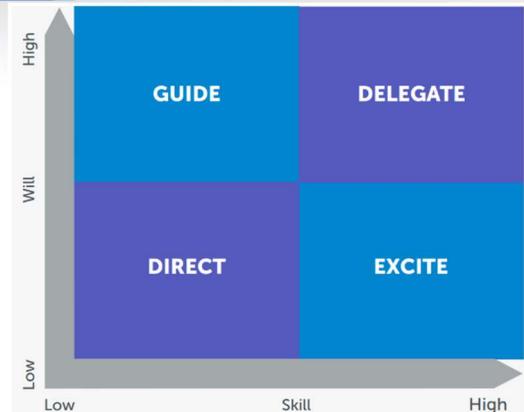
**3. Individuals who are capable** This is where the majority of your team members will fall. These individuals are consistent performers who consistently meet expectations.

**4. Individuals who do not perform well** They are not meeting performance objectives and will be removed from your team if they do not improve their performance in the next several months. You need to spend a lot of time coaching these people for three to six months and see if their performance improves.

# Skills vs Will Assessment

Let's apply the skill/will analyses to look at the employees that you want to coach.

**Instructions:** Select three to five individuals you need to coach and complete the following exercise.



1. List the **names** of the individuals and their **role** on your team.
2. Answer the following questions for each person
  - a. What is the **kind of work/program/project/task** that we want to analyze?
  - b. What **level of relevant skills** does this person currently have (in relation to the expectations of the project / program)?
  - c. What **level of motivation** does this person have for securing the outcomes of this project /program and / or for working as a team and / or for ensuring that they perform optimally?
3. Look at the Skill/ Will quadrant and give a label: **Direct, Guide, Excite, Delegate**
4. Look at Coaching matrix and write down **which elements you will focus on coaching** the employee.

**Capable**  
MEDIUM SKILL/ MEDIUM WILL  
They are most likely fulfilling the task requirements of the role and may be achieving performance targets.

- Minimal Investment required
- Keep an eye on motivation levels in this area
- they will be good at their jobs, have good behaviors, be seen as "steady" in their roles, and may have reached their development potential.
- We may therefore wish to keep them in role and maintain their performance.

<b>GUIDE</b> <b>HIGH WILL/LOW SKILL</b> The enthusiastic beginner, new to a role, project or task: <ul style="list-style-type: none"><li>• Coach and train</li><li>• Answer questions, explain, encourage self-assessment</li><li>• Create a risk free environment to allow early mistakes and learning</li><li>• Relax control as progress is shown.</li></ul>	<b>DELEGATE</b> <b>HIGH WILL/HIGH SKILL</b> The skilled worker who is looking for more opportunities to grow and develop: <ul style="list-style-type: none"><li>• Provide freedom to do the job</li><li>• Set the objective not the methods</li><li>• Praise, don't ignore</li><li>• Encourage them to take responsibility and involve them in decision making</li><li>• Take appropriate risks, include stretching tasks.</li></ul>
<b>DIRECT</b> <b>LOW WILL/LOW SKILL</b> The beginner to a role, project or task who may be nervous or have already tried and failed: <ul style="list-style-type: none"><li>• First build the will by talking about what motivates and interests them</li><li>• Provide clear briefing</li><li>• Develop a vision of success</li><li>• Build the skill by structuring tasks for quick wins</li><li>• Coach and train</li><li>• Sustain the will by frequent praise and feedback</li><li>• Supervise closely with tight control and clear deadlines.</li></ul>	<b>EXCITE</b> <b>LOW WILL/HIGH SKILL</b> The skilled worker who is in need of attention – may be change or engagement related: <ul style="list-style-type: none"><li>• Identify reasons for low will</li><li>• Develop intrinsic motivation, incentives, value alignment etc</li><li>• Work on their confidence by developing a vision of how good they could be</li><li>• Monitor with feedback and praise.</li></ul>

Name/Role	Assignment/Task/Project	Skill	Will	Coaching

# Effectively Set and Communicate Expectations

## DEFINING YOUR LEADERSHIP/COACHING EXPECTATIONS

Instructions: Fill in the blanks with your answers to the following questions.

**1. What behaviors are most important to accomplish the companies or department's goals?**

*(Sticking to our promises that we make. Being accountable. Taking charge of problems, going above and beyond what customers expect, and so on.)*

**2. Consider the actions that have led to your greatest achievement. Do you have unarticulated expectations that your employees should know about because you expect them to do the same?**

*(Prepared, up to date-and informed, being communicative, managing relationships)*

**3. Think about your expectations regarding communication. In what type of situations do you expect others to initiate communication?**

*(For example, when there are problems, keeping you up to date, and so on. In addition, think about which concerns you'd like to discuss face-to-face rather than over chat/text or e-mail.)*

**4. What frustrates you. If you find yourself becoming irritated with your coworkers on a regular basis, you may have a severe expectation breach.**

*(Such as being surprised by problems, not telling your boss about a problem before talking to you, and so on)*

**5. How do you see your team members, interacting with one another, customers, other departments, and so on?**

*(Healthy discussions, no agreement if everyone agrees without a discussion, hard on the ball soft on the person)*

**6. As a manager, what can people expect from you? Do you have frequent employee meetings, for example, or do you offer feedback on a regular basis?**

*(Advise, direction, discretion, reliability, resources, sounding board, fairness)*

**7. Now can you pick your top 5-7 leadership expectations? Can you pick a few that matter most and write them down and why they matter? When en who will you communicates this to?**

**Remark:** If possible, make sure you talk about expectations with the coachee early on in your relationship. In fact, schedule a meeting with the employee as soon as possible after he or she is employed. This lays the groundwork for your coaching partnership.

# Coaching with a Purpose

## Instructions:

Select an employee from the exercise before for this activity. Get more precise on why you're coaching them and write this in the space provided.

**Name of Employee:**

**Date:**

- 1. Current State of Behavior (+):** List the current behaviors, trends, or results of the employee's performance that you think are good and want to see more of

- 2. Current State of Behavior (-):** List the current behaviors, trends or results of the employee's performance that concern you and you'd like to see improvement

**3. Your Coaching Purposes:** Look at 1 and 2 and select a few things that you want to accomplish as a consequence of the coaching. List some desired behaviors, trends, or results of the employee's performance you wish to see. Try to qualify and quantify it if possible.

**4. Skill/will analyses and Coaching approach.** Look at skill will assessment

**5. What issues might arise during coaching and how to deal with it?**

**6. Other remarks**

# Coaching Agreement

This is a coaching agreement between

\_\_\_\_\_ and \_\_\_\_\_  
(coach name) (coachee name)

We agree to coach for \_\_\_\_\_ weeks, every

\_\_\_\_\_ at \_\_\_\_\_ at \_\_\_\_\_  
(day of the week) (begin/end time) (place/ Online, Phone)

We want to achieve the following during coaching:

- 1.
- 2.
- 3.
- ...

---  
Manager (coach) Signature

---  
Coachee Signature

# Are you a good virtual coach?

## INSTRUCTIONS

If you have been coaching virtually and want to know if and how you can improve look at the following statements

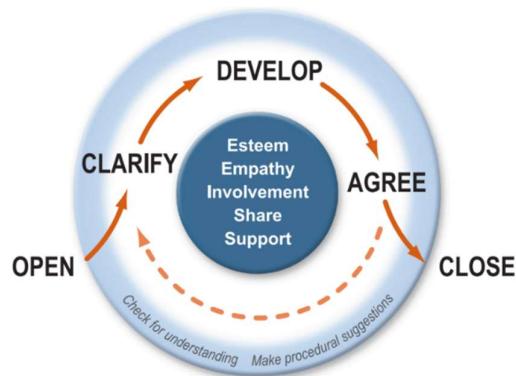
### Read the statements

- Circle: - Yes – Somewhat – No
- Make a note how to Improve yourself (if possible)

Statement		Improvements
Have you kept your virtual coaching meetings a priority?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	
Do you use the right communication tools for the right message?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	
Have you been using the best communication and collaboration technologies?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	
Are you technologically savvy with the platforms you are using?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	
Are you purposeful in your meetings?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	
Have you clearly communicated meeting etiquettes?	<input type="checkbox"/> Yes <input type="checkbox"/> Somewhat <input type="checkbox"/> No	

Name Employee(s): \_\_\_\_\_ Date: \_\_\_\_\_

# Effective Interactions Worksheet



## OPEN

What do you want to talk about? (and its importance)

---

## CLARIFY

What do I need to clarify? (facts, figures, or information)

---

What clarification questions will I ask?

---

## DEVELOP

How are you going to get ideas? (Use idea generation and evaluation techniques)

---

What is your idea?

---

What questions will I ask?

---

## AGREE

Specify what will be done, who will do it, and by when

---

Agree on any follow-up actions needed to track progress in carrying out the plan.

---

Be sure to agree to needed resources or support.

## CLOSE

Go over the main points of the discussion and what people agreed to

---

Make a final check on everyone's confidence in their ability to follow up on the actions they agreed to

# Examining Your Listening Capabilities

**TO LISTEN ACTIVELY, REQUIRES THAT YOU BE 'PRESENT' ALL THROUGH THE CONVERSATION.**

## **INSTRUCTIONS.**

12 Statements to help you evaluate your active listening skills

Answer with **Yes - No**

### **Do you?**

### **Answer**

- |  |          |
|--|----------|
| 1. Make assumptions about the person you're listening to?  | Yes - No |
| 2. Have prejudices (may be occasional) about certain personality types?                              | Yes - No |
| 3. Find yourself inwardly criticizing/commenting on what the other person has to say?                | Yes - No |
| 4. Feel compelled to prove your point (especially when the other person is wrong on facts or ideas)? | Yes - No |
| 5. At times become 'hyper' (over stimulated/over enthusiastic)?                                      | Yes - No |
| 6. Frequently often have something else on your mind?  | Yes - No |
| 7. Become too busy to listen?  | Yes - No |
| 8. Feel too tired to listen?   | Yes - No |
| 9. Find people boring and repetitive and feel tuned out due to lack of interest?                     | Yes - No |
| 10. Easily get impatient?  | Yes - No |
| 11. Nurse an ego, though not consciously?  | Yes - No |
| 12. Daydream and allow your mind to wander off?  | Yes - No |

## **How to interpret your scores:**

*For each 'No,' award yourself a point. The more 'No's you have, the better your active listening profile is.*

- If you score **10 or more**, you a truly active listener.
- A score of **6 or less** will mean that you need to work on improving your listening skills.

# Pre-Meeting Preparation

## Instructions:

Prepare your coaching meeting and the topics that you would like to discuss with your coachee here

**Name of Coachee** : **Date** :

**Duration of session** : **Method** : *F2F/Phone/Virtual*

### Check in:

Take the opportunity to check-in with your coachee before jumping into the focus of the day's conversation. Something you want to ask, acknowledge, or mention.

### Action items from your last meeting

Look at the **last Meeting's Goals and Action Plan**? What do I need to focus on?

- What questions will you ask the employee about it?

Have I looked at **my Personal Meeting Notes**? What do I need to focus on?

- What questions will you ask the employee about it?

Have I checked **Key Numbers (KPI)? Results**? What do I need to focus on?

- What questions will you ask the employee about it?

**New Topics you want to address**

Formulate issues, topics, feedback that you want to give

- What questions will you ask the employee about it?

**New Organizational information**

What organizational/ personal information do I want/need to share?

**New projects/ tasks/ responsibilities**

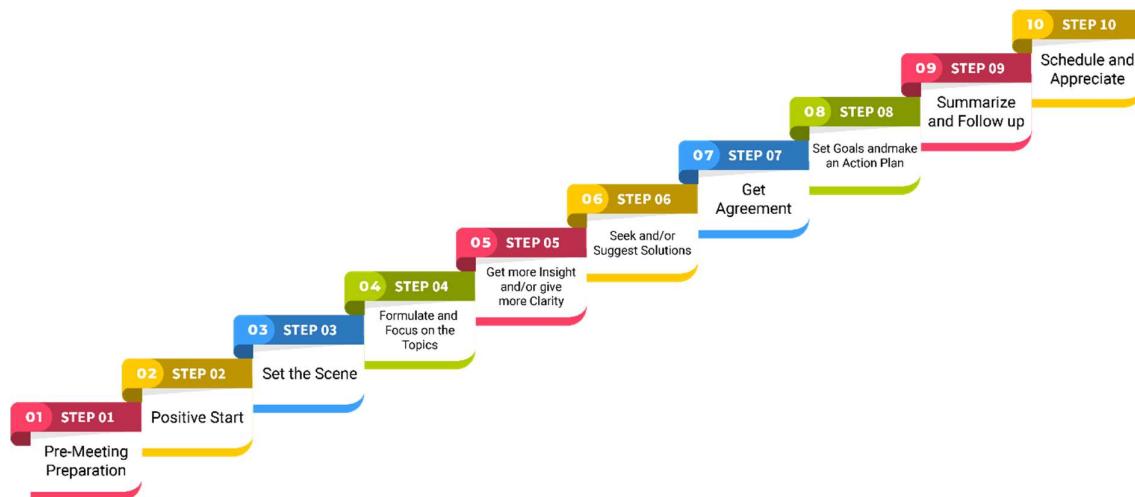
New projects/ tasks/ responsibilities you want to address

**Miscellaneous**

Name Employee: -----

Date: -----

# Performance Coaching Planning Worksheet



## Step 1: Pre-Meeting Preparation

- Do I have an overview of last meeting's goals and actions?
- Have I looked at my meeting notes?
- Have I checked key numbers (KPI)? Results?
- Is there certain information I need to share?
- What are the exact topics I want to address?
- What do I want out of this meeting?

## Step 2: Positive Start

- Is there something specific that I'd like to "small talk" about?
- Is there something positive about the person I want to mention?

## Step 3: Set the scene

- Describe in detail why this meeting is being held (see step1)
- What were last meeting's topics that have to be covered?
- Did you receive input from the employee?
- What are new topics for this meeting? (see step 1)

## Step 4: Formulate and Focus on the Topics

- What went well? What feedback, changes, or issues do you want to address feedback (+)?
- "What didn't go well?" "What areas do you need help?" What feedback, changes, or issues do you want to address (-)?
- Introduce new Assignments, Responsibilities, Tasks, Changes or Issues

## **Step 5 Get more Insight a/o give more Clarity**

- What topics/ issues do you want to get more insight on?
- 

- What topics/ issues do you need to clarify more?
- 

## **Step 6: Seek a/o Suggest Solutions**

- How will you encourage your direct report to brainstorm with you?
- 

- What solutions will you suggest and how will you bring them into the conversation?
- 

## **Step 7: Get agreement**

- How will you create agreement and “buy-in” on the solution?
- 

## **Step 8: Set Goals and make an Action Plan**

- Set or ask for SMART goals and action steps, Specify what will be done, who will do it, and by when
-

## Step 9: Summarize and Follow up

- How do you make sure, you will cover the most important takeaway from the meeting?
- Check Commitment to follow up on the actions they agreed to
- How would you like to stay informed about progress or issues?

## Step 10: Schedule and Appreciate

- When do you want to meet again?
- What can you say to “show your confidence” in your direct report?

# Action Plan

<b>Issue/Problem</b> (Describe the issue)					
<b>Goal</b> (Be sure to write "SMART" goals)					<b>Completion Date:</b>
<b>Action Steps</b> <i>(What Will Be Done?)</i>	<b>Responsibility</b> <i>(Who will do it?)</i>	<b>Timeline</b> <i>(By when? + Check-in?)</i> MM/YYYY	<b>Resources</b> <i>(List financial, human, organizational, other)</i> A. Resources available B. Resources needed	<b>Potential Barriers</b> <i>(What are the potential challenges? How to overcome them?)</i>	<b>Assistance</b> <i>(How can manager assist to ensure success)</i>
Step 1:			A.  B.		
Step 2:			A.  B.		
Step 3:			A.  B.		
Step 4:			A.  B.		
Step ...			A.  B.		

# Giving Real-Time Feedback

## Instructions:

Consider a person to whom you would want to provide some brief feedback, and then answer the questions below about the "case".

**Describe the individual as well as the issue/problem or situation:**

## Real time feedback:

### 1. **Positive start**

- *What things did the person do well?*

### 2. **Set the scene / Give insight**

- *How can you provide context or give more insight?*

### 3. **Suggest Solutions**

- *What are the areas for improvement?*

### 4. **Check Understanding**

- *What to ask to see if the coachee understands your suggested solutions?*

### 5. **Get Agreement**

- *What to say/ ask to see if you both agree on steps to be taken?*

# Thinking Through Your Team Coaching Role

## Instructions:

To identify your job as a team coach, **answer the following questions**. It's important to figure out the team coaching roles you want to play. You will have done an excellent job defining your team coaching role after you have completed this Exercise.

### 1. Help the team to be clear about its Purpose

- a. *What do you and the team believe the purpose is of your team?*
  
- b. *How do you help the team to have all the same and clear picture of this purpose?*
  
- c. *How will you clarify, reinforce your team's purpose in your coaching?*

### 2. Help the team Set, Monitor, and Achieve goals

- a. *What goals does the team have to achieve?*
  
- b. *What milestones will you use to measure progress?*
  
- c. *How will you and the team monitor your progress?*
  
- d. *How will you coach the team to achieve the goals?*

### **3. Establish Ways of Working in the team (Process and Values)**

- a. *What processes need to be in place to succeed?*
- b. *What processes, procedures, or work methods have to be changed to increase performance and increase team ownership?*
- c. *How will you coach the team to make sure thorough processes, procedures, or work methods are in place?*
- d. *What are the underlying beliefs and values of the “way” the team works*
- e. *How will you coach the establish and follow the teams’ values and beliefs?*

### **4. Help build Team Collaboration and Relationships**

- a. *What specific things will you do to build team relationships?*
- b. *What specific things will you do to enhance team collaboration?*
- c. *How will you use coaching to improve collaboration, relational and interpersonal skills of the team?*

### **5. Determine what Skill Development is needed and How to increase Team Accountability**

- a. *What specific skills do team members need to learn?*
- b. *What is the best way to help the team master these skills through coaching?*
- c. *How will you stimulate and increase individual and team responsibility?*
- d. *How will you coach the team to encourage taking responsibility and ownership?*

# Are you empowering your team enough?

## Instructions:

We discussed how to detect whether you are empowering the team enough. Reread the seven statements and answer the questions.

**Read the statements** and circle if you think it's:

- True – Somewhat True – Not True

Statement	Remarks
" I'm the one mostly talking"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm taking the majority of the decisions"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm the central point of communication "	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm so good"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm actively involved in all projects"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm the one who tells people how and what to do"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True
" I'm the one who resolves conflict in the team"	<input type="checkbox"/> True <input type="checkbox"/> Somewhat <input type="checkbox"/> Not True

2. Which 3 issues (from above) are the most important for you to change?

3. What can you do to go from a more directive approach to one where you are more of a team coach?

# PDCA CYCLE ANALYSIS

Learn to use this Continuous Improvement Method.

## Plan

IDENTIFY:	<b>Define the problem</b> clearly. Identify current methods, standards, and procedures.
OBSERVE:	<b>Describe the problem</b> and look at its characteristics from different points of view
ANALYSE:	<b>Investigate and confirm the real causes</b> , not the effects of the problem. Evaluate possible alternatives to eliminate the cause
ACTION PLAN:	<b>Document an action plan</b> to prevent (or minimize) the cause of the problem. Set goals, schedule, and methods.



## DO

EXECUTE:	<b>Perform</b> the steps defined <b>in the action plan</b> . Observe and compare the predicted and accomplished schedule.
----------	---



## CHECK

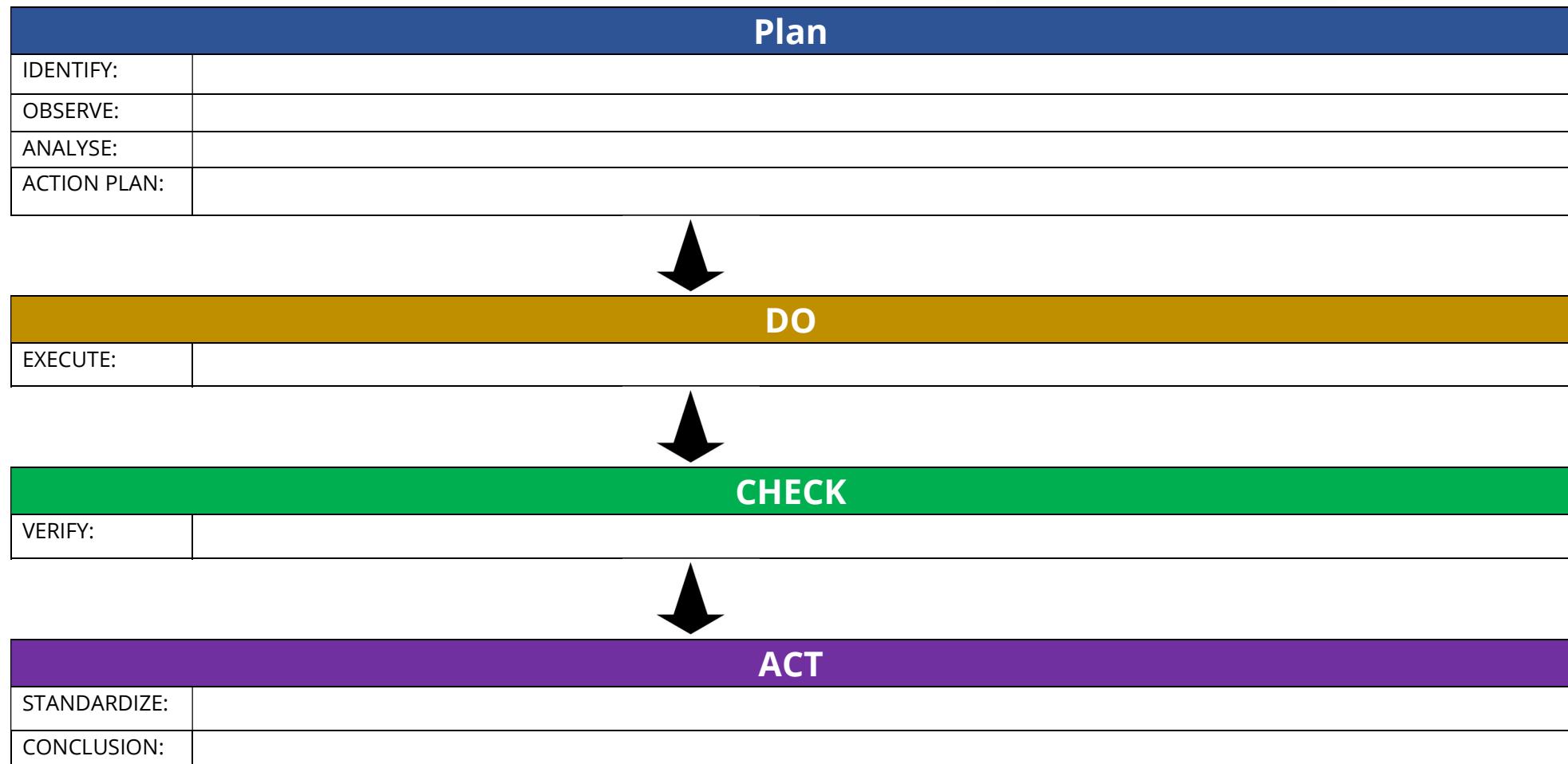
VERIFY:	<b>Monitor the results</b> and if there is no preventing the cause, go back to "NOTES" and make corrections.
---------	--



## ACT

STANDARDIZE:	<b>Use the standard</b> adopted to prevent the reappearance of the problem.
CONCLUSION:	<b>Measure the results</b> , validate the problem-solving process, and apply incremental continuous improvements

Template



# Making a First Start to Coach for Improvement

## Instructions:

Instructions: Think about your team's purpose and value and ask yourself "What do we need to accomplish better, safer, quicker, cheaper, or more efficiently?"

**Write down the top 3 improvement for your team/department/company:**

- 1.
- 2.
- 3.

**Now think about how you can Coach the Team to Start making these Improvements.**

- 1.
- 2.
- 3.