Precision Installations Co.

Coaching Program
Proposal

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BUS 515 - July 2025
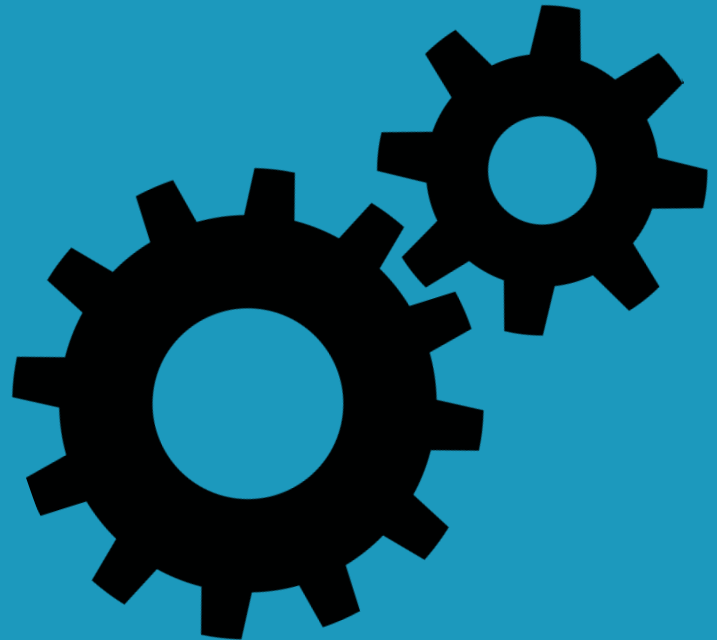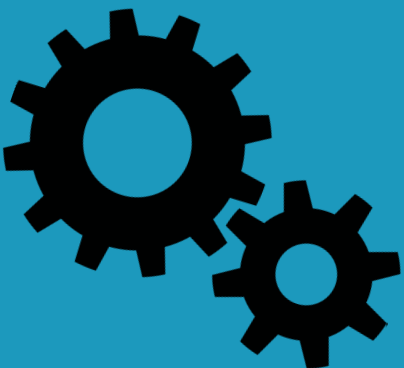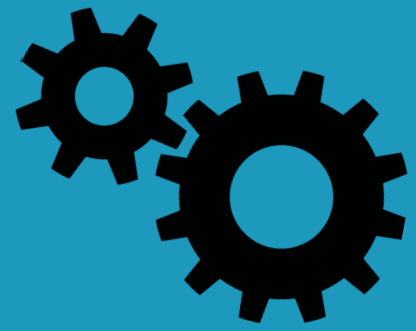
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Types of Coaching Report

INTRODUCTION

At Precision Installations, we've identified a need to support installer growth involving guided development and soft skill training. Our crew leads are typically promoted from within, but some haven't received formal training in managing teams or handling performance-related conversations. A coaching program can help, but first it's important to understand different types of coaching options and determine which are best for our company.

TYPES OF COACHING IN DETAIL

- **Executive Coaching:** Executive coaching is typically used with senior leaders and decision-makers. It focuses on enhancing leadership capabilities, strategic thinking, and overall company impact.
    - **Example:** A regional manager meets with an executive coach to develop a better long-term vision for scaling operations and managing a variety of teams.

- **Life Coaching:** Life coaching uses a broad, personal development approach. It supports individuals in finding work-life balance and overall wellness and includes values and goals not necessarily work-related.
    - **Example:** An installer facing burnout speaks with a life coach to explore how their work-life balance affects job satisfaction and personal well-being.

- **Performance Coaching:** Performance coaching focuses on improving specific job-related skills and behaviors. It's typically used for individual installers or other team members looking to grow in their roles.
    - **Example:** A new crew lead is coached on how to handle a tough customer interaction, receiving feedback and guidance on how to communicate and act professionally.

- **Career Coaching:** Career coaching helps employees explore career paths, set goals for their future, and develop plans for achieving new roles or opportunities.
    - **Example:** A long-time installer seeks career coaching to explore whether they'd like to move into training, sales, or management roles.

COMPARING COACHING TYPES

While all four coaching types help individuals grow, they differ in focus. Executive and career coaching usually center on future planning and long-term impact, while performance and life coaching focus on immediate results and challenges, or well-being. Both executive and career coaching involve planning for the future, but executive focuses on a leader's impact on the organization, and career coaching focuses on an individual's path. Performance coaching is relevant in companies where employees are promoted quickly and need to build people-management skills, which matches our needs at Precision Installations.

RECOMMENDED COACHING TYPES

To meet our needs, we recommend primarily using **performance coaching** and **career coaching**. Performance coaching will help new and existing crew leads manage real-time challenges in the field , while career coaching will guide high-potential employees who want to explore leadership paths or specialized roles (e.g., smart home installations, team training). This dual approach supports both short-term improvement and long-term engagement.
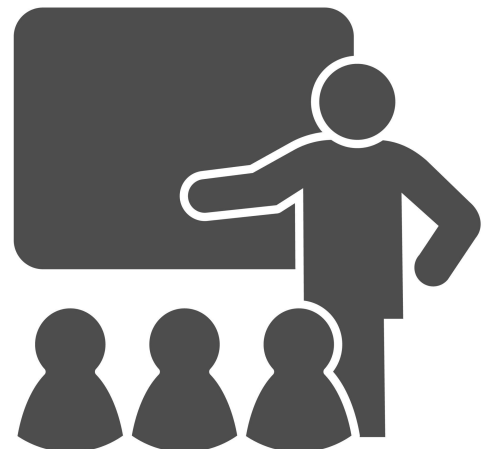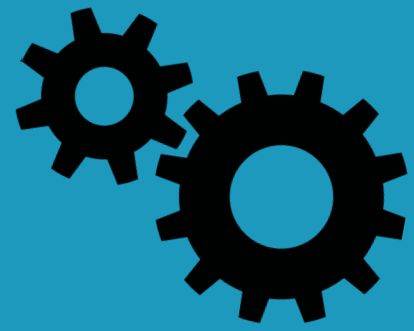
SECTION 2: Foundational Principles Guide

INTRODUCTION

A successful coaching program must be built on strong, consistent practices. At Precision Installations, we'll focus on four core coaching principles to ensure our program is practical, effective, and encouraging for all participants: **Active listening**, **effective questioning**, **feedback vs. feedforward**, and **goal setting** with SMART goals. You can find a summary and examples of each on the next page.

## RECOMMENDED PRINCIPLES

For our coaching program, **active listening**, **feedforward**, and **SMART goal-setting** will be emphasized. These techniques are especially helpful for our crew leads, who often coach peers informally on job sites and need to guide without micromanaging. Encouraging future-focused coaching conversations with clear goals supports both accountability and team morale.

COACHING PRINCIPLES IN DETAIL

- **Active Listening:** Active listening means fully focusing on the speaker, not just hearing the words but understanding the intent and emotion behind them. This is essential in coaching because it helps build trust and creates space for honest reflection.

  - **Techniques include:** Paraphrasing what was heard, asking clarifying questions, and using open body language. Coaches should avoid interrupting and resist the urge to "solve" the issue too quickly.

- **Effective Questioning:** Good coaching depends on asking the right questions. Powerful questions are open-ended, future-focused, and designed to help the coachee reflect. Effective questioning helps the coachee find their own solutions, building autonomy and confidence in their decision-making.

  - **Examples include:** "What outcome are you hoping for?" "What's getting in your way?" and "What could you try differently next time?"

- **Feedback vs. Feedforward:** Feedback focuses on past actions (what was done well or poorly) while feedforward is about the future. It offers constructive suggestions for what to do next, reducing defensiveness and promoting growth. Best practices suggest keeping feedback specific and timely. When using feedforward, highlight one thing the coachee can do to improve next time.

  - **Examples include:** Instead of, "Your instructions were unclear on yesterday's job," try, "Next time, walk the customer through the install steps before starting, that way, they know what to expect and can ask questions early." Instead of, "You didn't double-check the tools again," try, "Next time, try using the checklist before loading the truck — it only takes a minute but avoids a lot of delays."

- **Goal-Setting and SMART Goals:** Setting goals is key to tracking progress and keeping coaching purposeful. SMART goals are: *Specific*, *Measurable*, *Achievable*, *Relevant*, and *Time-bound*. Coaches help coachees create goals and check in regularly on progress.

  - **Examples:** "Complete the advanced troubleshooting module and shadow one senior installer by August 15," and "Lead at least two customer walkthroughs from start to finish this month, and ask your crew lead for feedback afterward on clarity and professionalism."
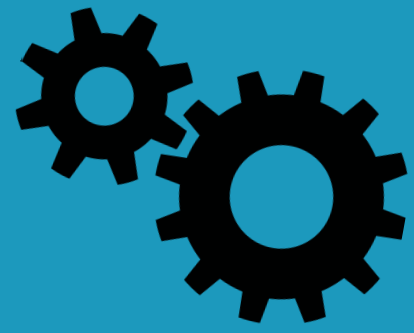
SECTION 3:
Role-Playing Scenarios

INTRODUCTION

To practice and apply our coaching model, we've created three role-playing scenarios tailored to real challenges faced by our team members. These can be used in peer-to-peer learning sessions or leadership development workshops.

Scenario 1: Coaching a Crew Member on Poor Communication

Scenario 2: Supporting a Career Development Conversation

Scenario 3: Addressing a Customer Complaint About Installation

EVALUATION CRITERIA FOR ROLE-PLAY SESSIONS:

1. Did the coach demonstrate active listening (paraphrasing, clarifying, no interruptions)?

2. Were powerful questions used to guide reflection?

3. Was feedback or feedforward delivered clearly and constructively?

4. Did the session result in a SMART goal?

5. Did both parties feel the conversation was respectful and productive?

SCENARIO 1: COACHING A CREW MEMBER ON POOR COMMUNICATION

Situation: A crew lead notices one of their installers frequently interrupts customers and doesn't explain the installation process clearly, leading to confusion and complaints.

Participants: Coach (crew lead), Coachee (installer)

Goal: Use active listening and feedforward to help the installer improve customer communication.

Coaching Application:

- **Coach starts by inviting reflection:** "How do you think the customer interaction went today, particularly when you were explaining the steps?"

- **Uses active listening, then paraphrases back:** "So, if I'm hearing you correctly, you thought you were being efficient, but you noticed the customer seemed a bit lost when you described the process. Is that right?"

- **Offers specific, constructive feedforward:** "Next time, consider pausing after each major step or topic to let the customer ask questions. This gives them a chance to process the info and feel more included."

- **Sets a SMART goal together:** "For your next two installations this week, make a conscious effort to use our "explain-pause-check" method with customers. Then make a quick note on how the customer reacted, so we can then discuss what worked well."

SCENARIO 2: SUPPORTING A CAREER DEVELOPMENT CONVERSATION

Situation: A high-performing installer wants to become a crew lead but isn't sure what skills they need to develop.

Participants: Coach (manager or mentor), Coachee (installer)

Goal: Use effective questioning and SMART goal-setting to help the employee map a career path.

Coaching Application:

- **Coach opens with a broad, encouraging question:** "What makes you interested in a leadership role here at Precision Installations, and what does success in that role look like to you?"

- **Asks follow-up questions, such as:** "What strengths do you think you'd bring to a management role?" and "What areas do you feel you'd need to develop to be a confident crew lead?" This helps explore strengths, goals, and potential gaps.

- **Creates a SMART goal together:** "To gain a better understanding of the crew lead role, your goal will be to shadow two different crew leads (e.g., Kevin and Hector) over the next month, taking notes on how they manage their teams and customer issues. Additionally, complete the 'Leading Small Teams' module in our online learning platform by September 1."

- **Ends with positive reinforcement and a path forward:** "That sounds like a great plan, and I'm excited to see you take these steps. Let's schedule a brief follow-up check-in around September 5th to discuss your experiences and progress."

## SCENARIO 3: ADDRESSING A CUSTOMER COMPLAINT ABOUT INSTALLATION

Situation: An installer has just finished an appliance installation, but the customer is upset, claiming there's a scratch on their new floor that wasn't there before. The installer is defensive.

Participants: Coach (crew lead), Coachee (installer)

Goal: Help the installer interact with a challenging customer using active listening and effective questioning, and find ways to prevent similar issues.

Coaching Application:

- **Coach starts by acknowledging frustration:** "That sounds like a tough situation. Tell me more about what happened from your perspective."

- **Uses active listening to understand the installer's view and paraphrasing key points:** "So, if I understand correctly... the scratch wasn't there before, and the customer is very unhappy about it."

- **Asks an effective, future-focused question:** "Thinking about future installations, what's one thing you could do differently during the setup or cleanup process to ensure this kind of issue doesn't arise, or how could you handle the customer's reaction differently?"

- **Offers feedforward based on the discussion:** "Next time, before leaving, do a final walk-through with the customer to check the space and get their sign-off on the condition, showing them you've checked for issues."

- **Sets a SMART goal together:** "For your next three installations, remember to complete a visual check of the floor with the customer and get confirmation that they're satisfied before you leave the job."
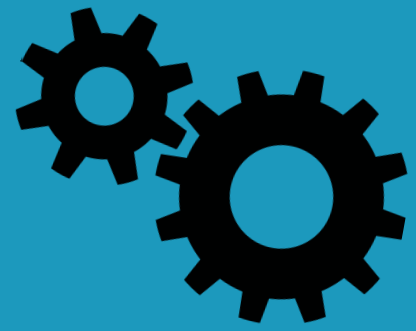
CONCLUSION:
Summary, Timeline, Costs

SUMMARY

This coaching program is designed to meet the real, practical needs of our team at Precision Installations, especially as we hire and promote more employees into management positions and work to improve communication on the job. By focusing on performance and career coaching, based off of key principles like active listening and feedforward, we're setting our team up for meaningful growth. Through relevant role-play, thoughtful questions, and clear goals, this program supports the kind of learning and leadership that lasts.

TIMELINE

Milestone	Date
Materials & Mentor Selection	Week 1
Mentor Training	Week 2
Program Kickoff & Pairing	Week 3
Coaching Sessions Begin	Weeks 3-7
First Program Review	Week 8
Adjustments & Expansion	Week 9

COACHING PROGRAM COSTS

The coaching program is designed to be highly cost-effective by leveraging existing internal resources and digital tools. Estimated expenses primarily cover initial setup and internal resource allocation:

- **Mentor Training Module Creation:** $400 (Covers internal time for content development and LMS updates)

- **Program Materials and Tracking Forms:** $100 (For digital templates and any minor physical resources)

- **Coaching Time (Non-billable Hours):** Estimated $1,500 over 2 months (Calculated based on dedicated coaching time from existing staff members).