



**NICE · CX** 

**Working from  
home doesn't need  
to feel remote.**

**On-demand Contact  
Center Workshop**

Watch now

# About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldy. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare two flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure to circulate

and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

**Introductions:** Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

## PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

# Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

## THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

# During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for “rabbit holes” that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **“Nudge Your Neighbor” activities:** Keep these to just 30-60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

## AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

# Workshop Overview

Topic	Activity	Time Allotted	Materials
Pre-workshop activity			PPT 5
Introduction (2 min)	Presentation	2 min	PPT 6-7; PW 3
Coaching Fundamentals (16 min)	Presentation	4 min	PPT 8-10; PW 3-4
	Nudge Your Neighbor	1 min	PPT 11
	Presentation	10 min	PPT 12-18; PW 4-6
	Nudge Your Neighbor	1 min	PPT 19
The Coaching Conversation (22 min)	Presentation	11 min	PPT 20-25; PW 6-8
	Nudge Your Neighbor	1 min	PPT 26
	Presentation	3 min	PPT27; PW 8-9
	Nudge Your Neighbor	1 min	PPT 28
	Presentation	4 min	PPT 29-31; PW 9-10
	The Conversation Activity	2 min	OOT 32
Coaching Tips (10 min)	Presentation	9 min	PPT 33-35; PW 10-11
	Nudge Your Neighbor	1 min	PPT 36
Close (10 min)	Review	4 min	PPT 37-38
	Action Plan	5 min	PPT 41; PW 12
	Concluding Comments	1 min	PPT 42

Total Time = 60 min

PPT = PowerPoint Slide

PW = Participant Workbook

# Welcome!

As soon as you get settled, provide your answers to the two posted questions.

What are some of the **benefits** of coaching?

What is your top **coaching tip**?



# Coaching Conversations

A Workshop

# Course Goal and Agenda

The **goal** of this course is to look at coaching conversations and develop principles that will lead to better conversations and improved performance.

- ⦿ Introduction
- Coaching Fundamentals
- The Coaching Conversation
- Tips for Better Coaching
- Close

# **The Fundamentals of Coaching**

# Coaching Defined

Coaching is an **ongoing** management process involving **direct reports** and with three main activities:

- Proactive **listening**
- Asking prompting **questions**
- Providing targeted, timely, and actionable **feedback**



# The Benefits of Coaching

Organizations with highly effective coaching are:

**30%** More likely to have strong business results

**33%** More effective at engaging employees

**42%** Higher employee productivity

Of organizations with strong coaching cultures:

**81%** See improved team functioning

**79%** See higher employee engagement

**70%** See increased productivity

**67%** See faster onboarding

**71%** See faster leadership development

Source: Bersin by Deloitte

Source: Human Capital Institute (HCI) and International Coach Federation (ICF)

# Nudge Your Neighbor

Take 30 seconds to tell someone near you one way you personally would benefit from being a better coach.



# Foundational Principles

- **Believe in each team member**
- **Create a safe environment**
- **Be respectful**
- **Tackle the difficult conversations**
- **Coach frequently and regularly**
- **Coach everyone**

# Believe in each team member

- Want the best for them
- Believe in their capacity to change
- Intend to help them grow
- Have great expectations for them



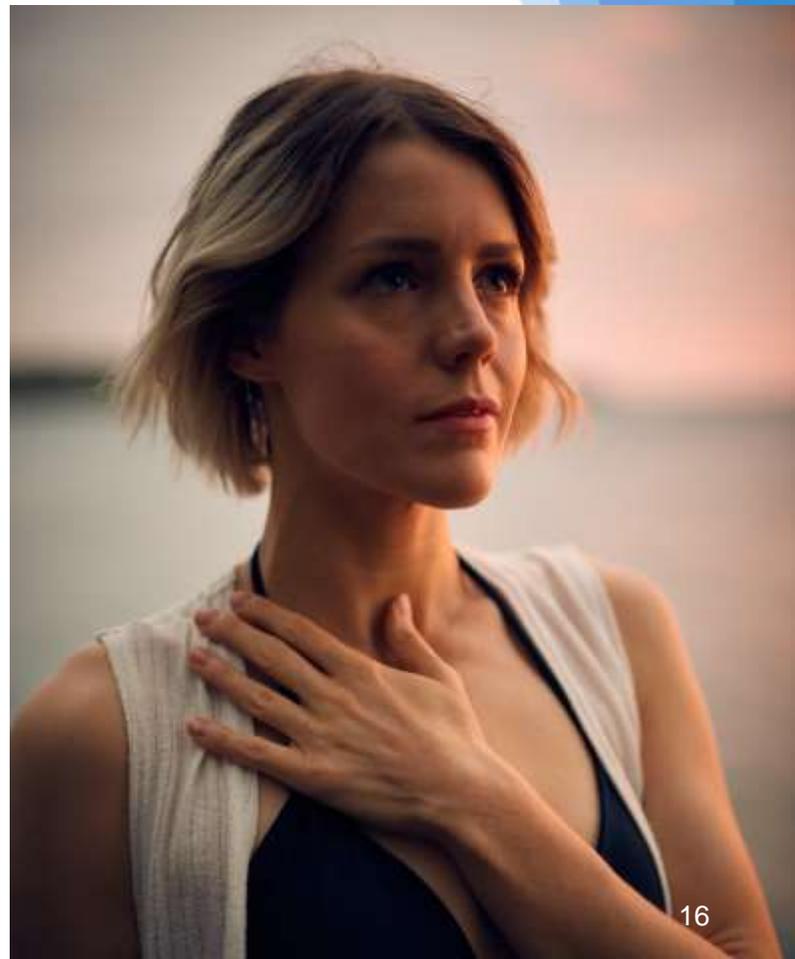
# Create a safe environment

- Build trust
- Get your intention right
- Hold boundaries until you are ready
- Be curious
- Recognize everyone's individuality
- Create a context of possibility



# Be respectful

- Show an honest interest
- Help them feel appreciated and valued



# Tackle the difficult conversations

- Be clear about expectations
- Many employees crave constructive criticism



# Coach frequently and regularly

- On a regular basis
- Daily “quick hits”



# Coach everyone

- Low performers
- High performers
- ALL employees



# Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing that struck you about the foundational principles of coaching.



# **The Coaching Conversation**

# Preparing to Coach

Review **past sessions** and actions since the last session

- What was last coached?
- What is the next skill to be developed?
- What are the priorities for this individual?
- Have I coached on this previously?

Gather **data**

- What data do you need and how will you get it?
- Specific examples are critical to reinforce the positive and provide evidence of improvement needed

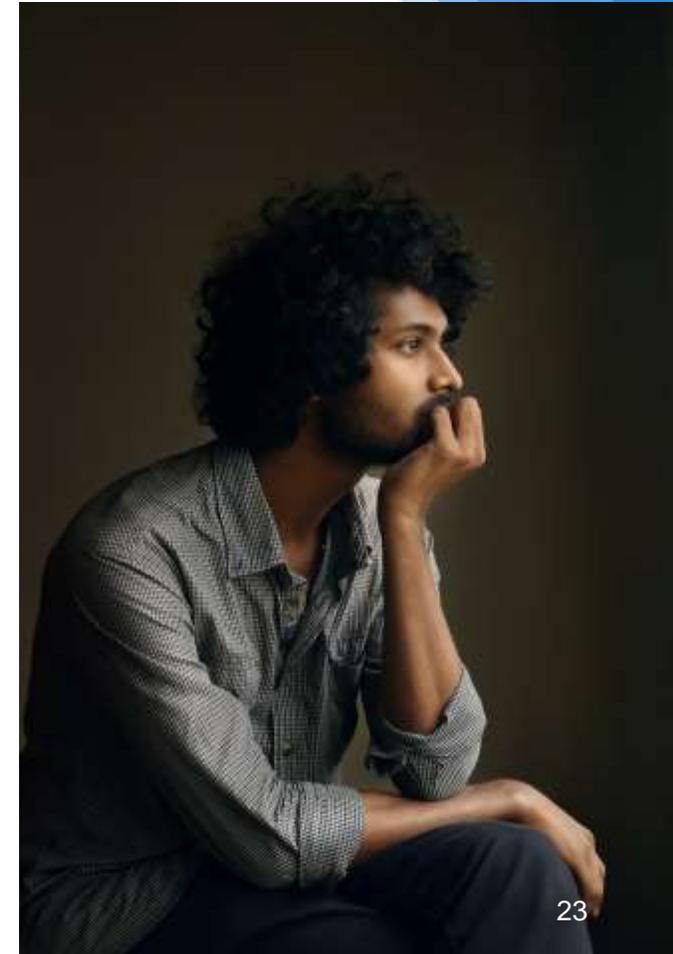
Think about what **motivates** the person

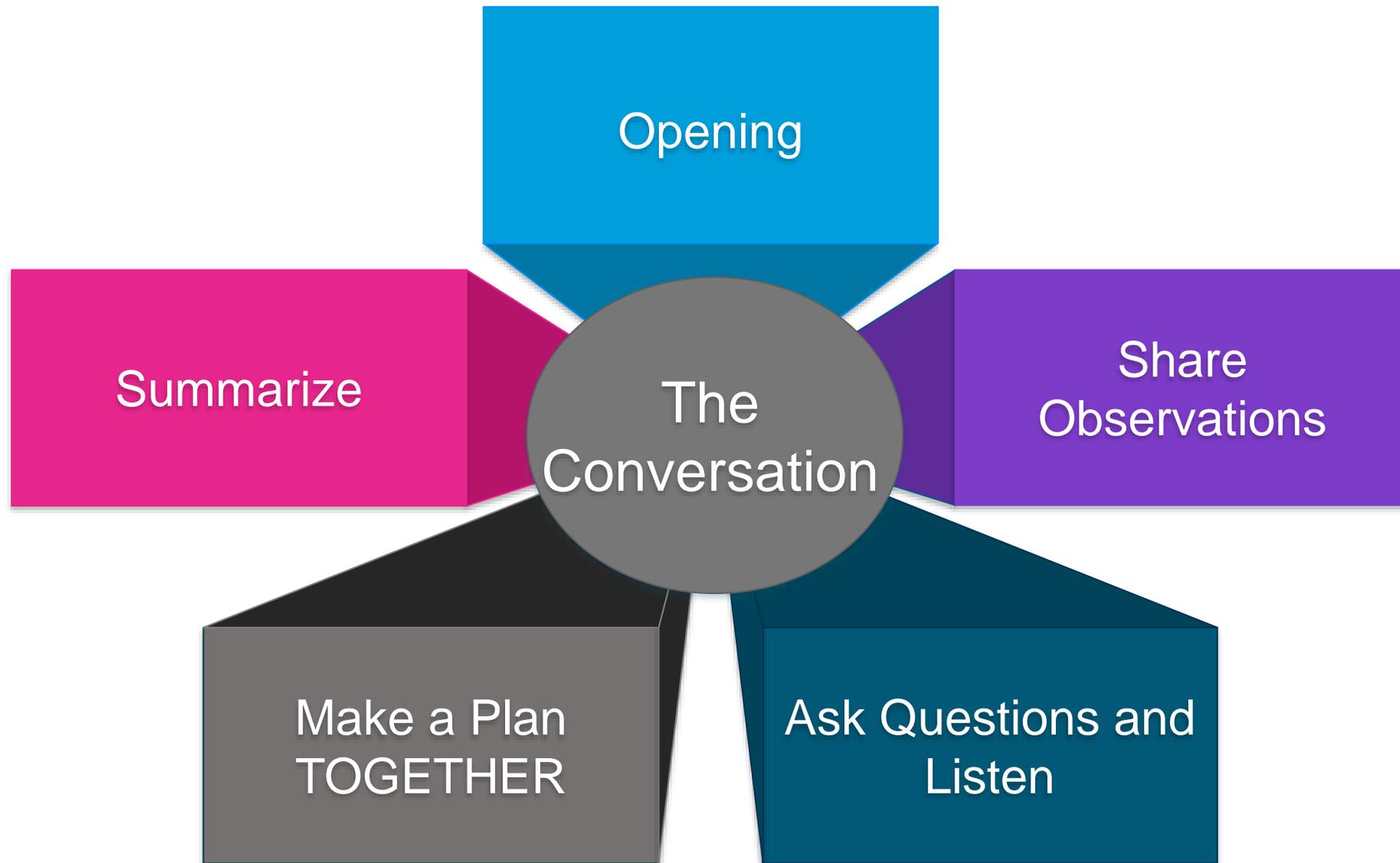
- How will you position issues to them?
- What are their hot buttons and motivations for being there?
- What might be potential roadblocks from the team member? How will you handle these?

What is my **attitude** towards this person?  
Do I want the best for them?

# The team member also prepares

- What have I accomplished since our last meeting?
- Did I meet the objectives set in the action plan?  
If not, why not?
- What challenges and problems am I facing now?
- What new opportunities do I see for myself?
- How do I want to use my coaching time?





# Opening

## Do a personal check-in

- How are they doing?

## Follow-up on actions from the last session

- Review the last action plan
- What has happened since then?



# Share Observations

**Observation** = what a person says or does.

- Focus on description rather than judgment
- Focus on observation rather than inference
- Focus on behavior rather than the person
- Watch out for feedback overload



# Nudge Your Neighbor

Take 30 seconds to tell someone near you one example of a smart observation you might make in a coaching session.



# Ask Questions and Listen

- Focus on “what” rather than “why”
- Be a thinking partner
- Be quiet
- Listen with your whole body
- Empathize

## Sample questions:

- What’s on your mind?
- What’s the real challenge here for you?
- What do you want?
- What is your perspective?
- Before I tell you what I might do, how about your own thoughts on this?
- Have you encountered this problem before? What did you do that worked?
- Any other ways of approaching this situation?
- What would be the best possible outcome for you?
- What could you change in your approach that might get you better results?
- How can I help?

# Nudge Your Neighbor

Take 30 seconds to tell someone near you one new question you'd like to use in a coaching session.



# Make a Plan **TOGETHER**

- Key actions to complete by the next coaching session.
- Training and resource needs
- Clearly state your expectations



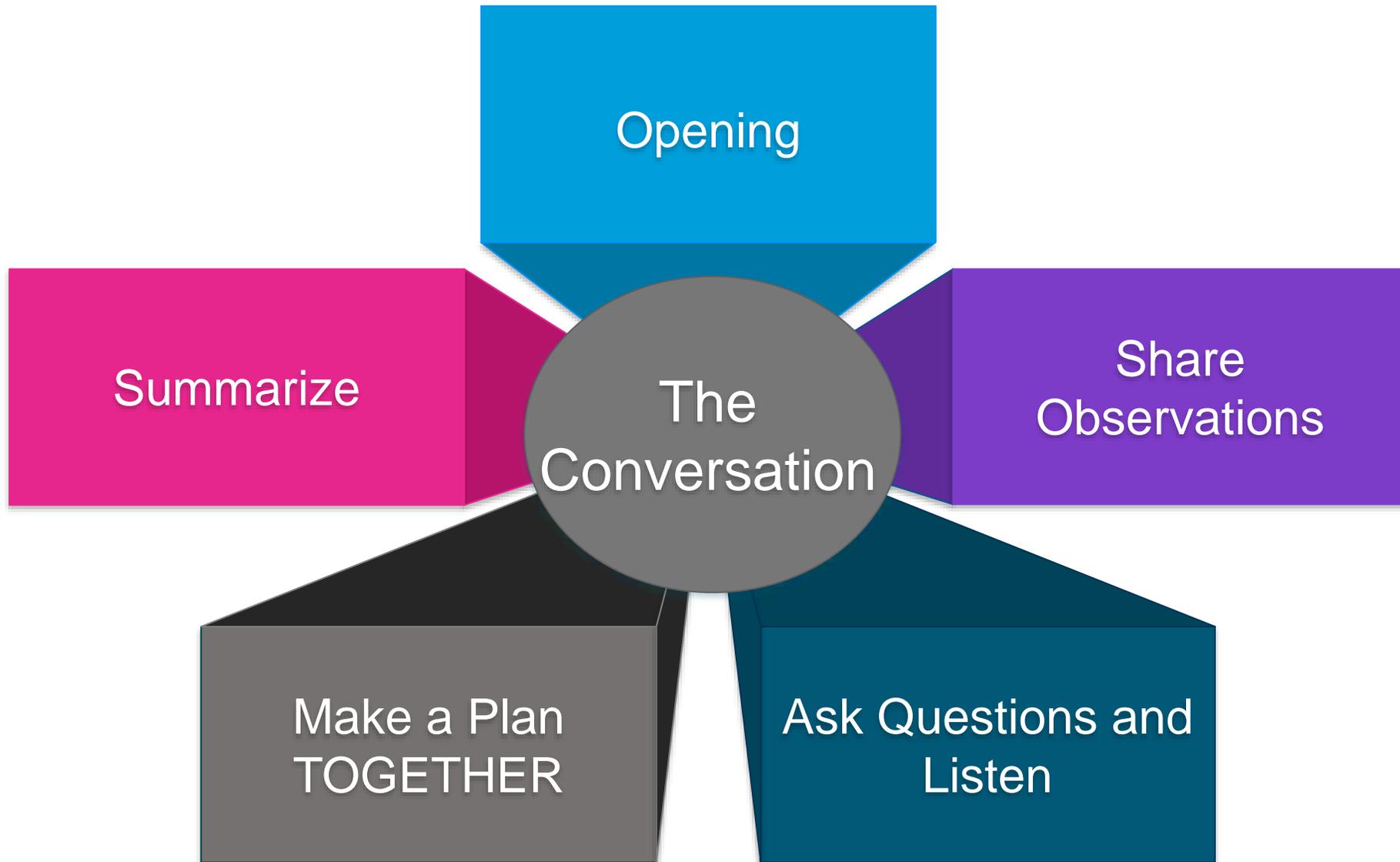
# Summarize



# After the Session

- Document
  - Topics discussed
  - Agreed upon actions
  - Things you need to do
  - Reminders for future sessions
- Keep private
- Reflect on your performance





# Tips for Better Coaching

# Coaching Tips

- Look for excellent outcomes
- Share your reaction
- Be conversational, not confrontational
- Don't talk too much
- Ask rather than tell
- Encourage small incremental changes



# Becoming a Better Coach

## Essential Coaching Skills

- Listening
- Building trust
- Being supportive, encouraging, and motivating
- Able to deliver praise and feedback

## Triangular Coaching

- An observer sits in on the coaching session
- Explain what is happening at the beginning of the session
- The observer may take brief notes
- Observer tries to sit in on three different sessions
- Observer provides feedback to the coach

# Nudge Your Neighbor

Take 30 seconds to tell someone near you your best tip for coaching better.



**Close**

# Review

## Coaching Defined



## Preparing to Coach

Review **past sessions**

What **motivates** the person?

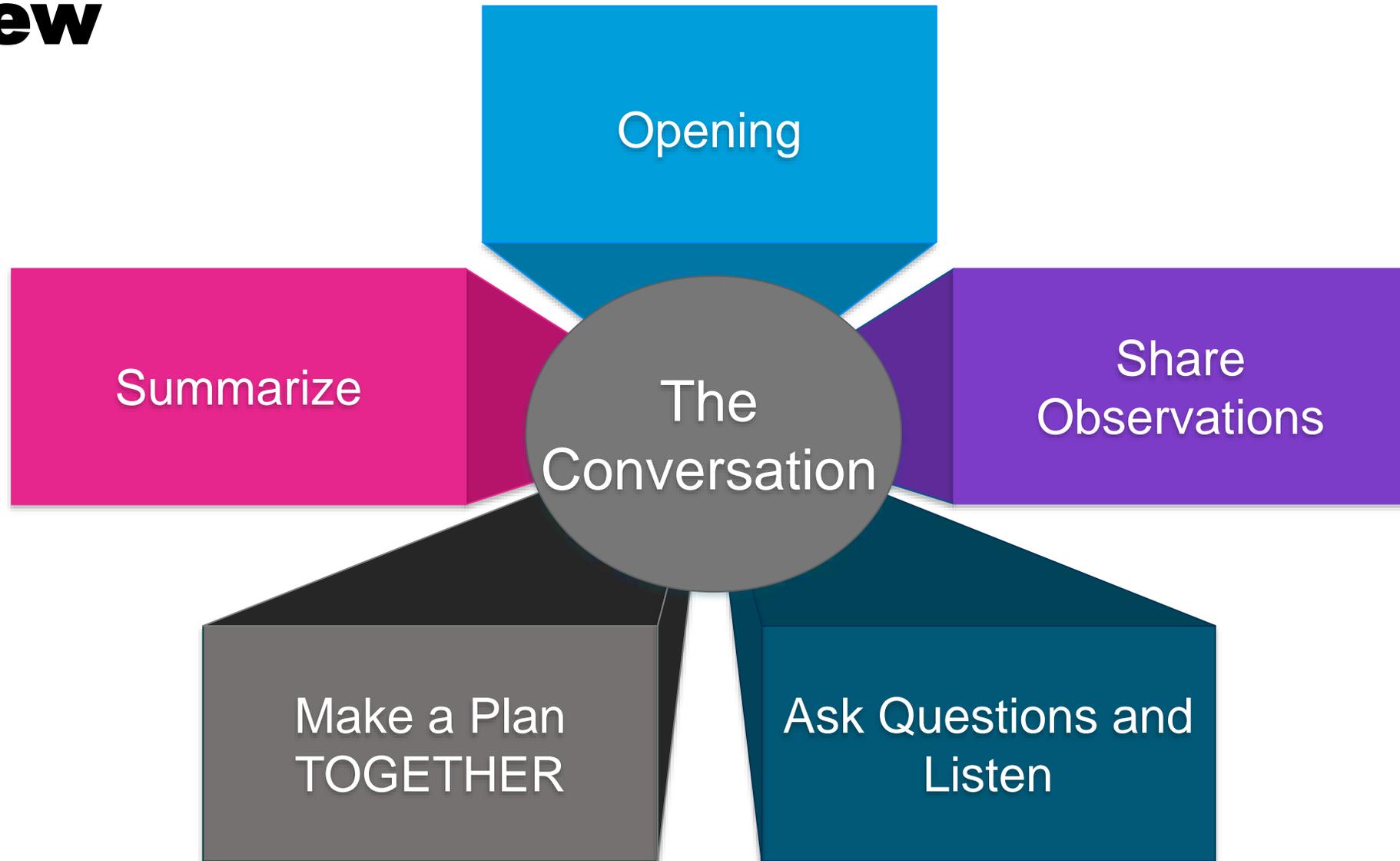
Gather **data**

What is my **attitude** towards the person?

## Foundational Principles

- **Believe in each team member**
- **Create a safe environment**
- **Be respectful**
- **Tackle the difficult conversations**
- **Coach frequently and regularly**
- **Coach everyone**

# Review



# Review

## After the Session

## Becoming a Better Coach

**Essential Coaching Skills**

**Triangular Coaching**

### Coaching Tips

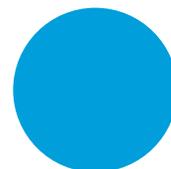


# Action Plan

What squared or agreed with what you already knew?



What did you learn that completed a circle of knowledge?



What action will you take as a result of this training?



What did you see from a new angle?





# Coaching Conversations

A training workshop

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<https://www.niceincontact.com/>

Developed by Elaine Carr and Laura Grimes  
of Harrington Consulting Group  
(<https://www.harringtonconsulting.us/>)



# Speaker Notes – Slide 6

This slide should be displayed as people are arriving for the training.

**If you are presenting virtually:** Turn this slide into a whiteboard or use two chat pods or two open-answer poll questions for people to put their answers to the two questions. Also be sure to turn on your camera.

**If you are conducting the workshop in person:** Place two flip chart pages, one for each question, at two places in the room with markers for people to move around and write their answers. Or place the questions on a whiteboard with space for people to add their answers.

# Speaker Notes – Slide 7

Welcome them to the training.

Briefly establish any housekeeping rules (such as muting their cell phones, taking their cell phones outside if they really need to take a call, where the rest rooms are, etc.) that are needed for the training.

Briefly introduce yourself, trying to keep this introduction to 30-60 seconds since you want the attention on the content and the participants rather than on you. If you would like, insert a slide after this one that introduces yourself.

For virtual training, you can turn off your camera after your introduction. This enables everyone to focus on the content instead of being distracted by what is happening on camera.

# Speaker Notes – Slide 8

Somehow, we expect that anyone who supervises people is good at coaching them. But coaching is a skill that can be taught, and people can always get better at coaching. So we will spend the next hour focusing on how to make coaching conversations better so that they lead to improved performance.

You may have some natural talent as a coach, or maybe you have learned to be a better coach through years of experience, but either way, you can pick up some new techniques and strategies to get better at coaching.

Go over the workshop agenda as laid out on this slide, briefly indicating what we will be covering in the next hour.

# Speaker Notes – Slide 9

We will begin by defining coaching for our purposes, listing some of the benefits of coaching, and going over some foundational principles of coaching.

# Speaker Notes – Slide 10

Coaching is often confused with other activities such as teaching, managing performance, directing others, and giving advice. All of these things are worthy tools in your management toolbox, but they are not coaching.

Coaching conversations are usually discussions encouraging **two-way conversations** based on good questions. Coaching is not a “telling” tool. It is a tool that helps the other person think through their challenges and find solutions to them.

Note and comment on the highlighted words in the definition.

# Speaker Notes – Slide 11

These are statistics from two reputable research reports on the benefits of coaching.

Think about this for a moment. How would you personally benefit from seeing more engaged employees, higher productivity, better functioning teams, and stronger business results? Would those kinds of results make you a better manager?

# Speaker Notes – Slide 12

## Activity

If training in person, just have people pair up with someone near them and quickly tell each other one benefit they would personally get from being a better coach.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

# Speaker Notes – Slide 13

Before we go into the details of conducting a coaching conversation, let's talk about six foundational principles as listed here.

We are going to go through each of these in turn.

# Speaker Notes – Slide 14

## Believe in each team member

This is the most fundamental of all the coaching principles. If you don't believe in the person you are coaching, your coaching is doomed for failure. They don't have to be your good friend, but you do have to believe in them. This means:

- **You want the best for them.** If you don't like someone, it's easy to harbor a secret desire for them to fail so your dislike is validated. Uncover and deal with your irritations and dislikes about the person and focus on truly wanting them to succeed. That's not just lip service, but a real desire for them to do well.
- **You believe in their capacity to change.** Everyone has the opportunity and capacity to change. If you don't think they can or will change, then you will be correct, and they won't change. Don't give up on people.
- **You intend to help them grow** rather than showing them they are wrong. Coaching should increase, as opposed to drain, people's motivating and resources for change.
- **You have great expectations for them** and are going to help them meet your expectations. Don't let them sell themselves short or pursue anything less than the best path forward.

Note that it is very easy to give “lip-service” to this principle without really meaning it. Give careful thought to each team member as an individual. Do you really believe in them? If not, you aren't the right person to coach them.

# Speaker Notes – Slide 15

## Create a safe environment

Failure at some point is inevitable for everyone. By creating a safe environment for team members to be vulnerable and make mistakes means that failure is quickly learned from and rarely repeated. Just recognize that you can't *make* others feel safe. Each person is responsible for their own reactions and emotions. BUT there is a lot you can do to reduce the likelihood that others will feel unsafe.

- **Build trust.** People need to know that you are providing coaching to help them get better and not just to check-off a task on your to-do list. You can build trust by asking good questions, truly listening, setting a good example, offering praise, keeping others informed, and being non-judgmental.
- **Get your intention right.** We already talked about this with the first principle, but it's an important part of this principle as well. When you coach out of resentment or anger or frustration, you are likely coaching to wound the other person and not to help. Deal with your emotions. When you feel a genuine concern for the growth and development of the other person, you are ready to coach.
- **Hold boundaries until you are ready.** If you are not in a place for coaching, then let the other person know, and reschedule for when you will be properly prepared. Better to reschedule than to coach when you are unprepared—physically or emotionally.
- **Be curious.** You might want to act like a detective trying to solve the mystery of how something happened. Keep asking questions and requesting examples until you understand their viewpoint, even if you don't agree with it. For now, you simply want to learn. Curiosity helps take the focus off self-worth and put it on the other person's experience.
- **Recognize everyone's individuality.** Get to know your team members. What motivates them? What are hot-button issues for them? This will give you great insight into how to approach them. Acknowledging different ways of approaching and handling a situation goes a long ways towards building trust and making coaching a safe activity for each team member.
- **Create a context of possibility.** Coaching is not about people's shortcomings. It is about getting better. For every goal or challenge you discuss in the coaching session, help them to see the possibility of accomplishing it. In other words, believe in your team members!

# Speaker Notes – Slide 16

## Be respectful

Coaching is not about you. It is about the other person. Respect means a lot of different things for different people. So part of getting to know your team members is uncovering what is important to them and using that to show them respect.

- **Show an honest interest.** Be fascinated with the other person. Listen deeply and ask questions to uncover more. If you begin your coaching sessions by giving the team member your undivided attention (as opposed to thinking about what you want to say or preparing for the next part of the conversation), they will be open to coaching. That undivided attention makes them feel important—which, of course, they are!
- **Help them feel appreciated and valued.** Communicate your coaching messages in a way that makes the team member feel good about their contributions to the company. Notice and acknowledge the little things they do that make their work better. This is not a compliment for the sake of a compliment but rather a sincere acknowledgement of the person and their contribution.

# Speaker Notes – Slide 17

## Tackle the difficult conversations

A lot of managers are reluctant to speak hard truths to their team members. But a manager who truly wants the best for their team members must give valid feedback which can sometimes include hard truths. This builds trust and helps the other person grow.

- **Be clear about expectations.** Research shows that being clear about expectations is the most basic of employee needs. If you are hedging around a topic or avoiding it entirely, you are not being clear about your expectations, and you are doing your team member a true disservice.
- **Many employees crave constructive criticism.** A major factor in workplace dissatisfaction is receiving too little feedback. If my supervisor is thinking something about my performance, I deserve to know what that is so that I can address it and remedy the situation. Not only do I deserve this, I WANT it. You can deliver hard truths while still being kind. It is better that you are transparent about where each team member stands with you than you deceive them by avoiding difficult conversations.

Your team members will actually value you and respect you more if they know that you will always let them know where they stand with you, even when that is difficult. They WANT this from you.

# Speaker Notes – Slide 18

## **Coach frequently and regularly**

If possible, coach on a weekly or at least bi-weekly basis. True, if you have a large team and can't do anything more frequently, a monthly session will suffice, but a weekly or every other week coaching session is much, much more helpful. Once established, these don't have to be really long sessions at all.

Try to give people a “quick hit” every day or several times a week. A quick hit might be telling someone “That's just what you are supposed to do.” or “You did that very well.” or “That's what we were talking about!” This shows that you are noticing what they are doing and acknowledging their efforts.

# Speaker Notes – Slide 19

## Coach everyone

- For low performers, turn mistakes into learning and build their confidence and competence.
- For high performers, recognize and provide specific details on what makes their performance strong.
- Everyone should be coached because everyone can improve. Are you being coached? You might ask your supervisor to provide some coaching to you in your regular one-on-one meetings. Every level within an organization should receive coaching. Everyone should be setting and achieving goals.

# Speaker Notes – Slide 20

## Activity

If training in person, just have people pair up with someone near them and quickly tell each other one thing that struck them about the foundational principles of coaching

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

# Speaker Notes – Slide 21

Now we are going into detail on the actual coaching conversation.

# Speaker Notes – Slide 22

## Preparing to Coach

You need to spend some time in three areas before a coaching session.

- 1. Review past coaching sessions and actions since that session.** What was the action plan at the end of the last session? What action has been taken on that plan? Consider all the questions on the slide. You want your coaching sessions to build on each other, so begin by looking at your notes from the last session.
- 2. Gather data.** This may mean looking at reports or listening to/reviewing contacts, thinking about team interactions, and reviewing performance on projects. Having a cloud system like NICE CXone systems makes running analytics and reports as well as reviewing contacts so much easier! You want specific examples of improvement as well as areas that still need improvement. You don't have to gather data on everything the team member has done. Focus on the areas you have already identified for improvement. This should be no more than 1-2 areas as you don't want people to be overwhelmed and feel like there is nothing they can do to get better since there is so much that needs attention. Tackle improvement areas one or two at a time to enhance the context of possibility.
- 3. Think about what motivates the team member.** Think about the person and what you know about them and your past experience with them. If you have difficult news to deliver, how will you position that so the person is not defensive? Think about what motivates the person, why they are doing the job, and their potential hot buttons and roadblocks. Strategize on how you will handle these.

*[CLICK]* One more thing you should think about is your attitude to the person. Do you want the best for them? What do you need to do to change a negative attitude about the person into a positive one? Remember that if you aren't in a good place to coach, you may need to reschedule.

# Speaker Notes – Slide 23

## Questions for the team member to Prepare

Here are some questions each team member may use to prepare for their coaching sessions as well.

If you emphasize that coaching sessions are their time to have your complete attention, then they will have more ownership of the session. Coaching sessions are not just something done to each team member but an interactive time with focus on their own growth and development—something desirable!

# Speaker Notes – Slide 24

## The Conversation

There are five parts of the actual coaching conversation, as depicted here. We are going to go through each part in more detail.

We picture the conversation as circular because it is an ongoing conversation, from coaching session to coaching session.

# Speaker Notes – Slide 25

## Opening

Two things should happen at the beginning of the coaching conversation.

1. First, you should take time to do a **personal check-in**. How are they doing personally? Anything new in their life? If you know that they were planning a graduation party for their oldest or their wife is pregnant, or other things about their personal lives, this is a good time to follow up on these. It is important to be sincere and authentic in your interest in them. This also helps build trust and shows that you care more about them as a person and not just a team member doing a job. This is a key time for giving them your undivided attention, but you also need to share a little of yourself with them so that everyone recognizes that this is a two-way conversation. Just take care that you don't draw too much attention away from the other person. It can be a fine balancing act, but if you expect the other person to be vulnerable and open, you have to be vulnerable and open as well.
2. Secondly, **review the action plan** you created together in your last session. What progress has been made? What has happened since then? This will help you both recognize if the improvement area is complete or if further work is needed. Often, complete improvement will take more than one action plan.

# Speaker Notes – Slide 26

## Share Observations

An observation is something that a person says or does. It is not what a person thinks as you can not observe their thoughts. You can only observe what they do. Some helpful things to keep in mind:

- **Focus on description rather than judgment.** You are not judging right or wrong or good or bad. You are just reporting an observation. This helps the other person respond constructively rather than defensively.
  - Example (or use one of your own): “You were very confident in the way you answered the customer’s questions” (descriptive) rather than “You showed good communication skills” (judgmental).
  - ASK for participants to give you an example or two.
- **Focus on observation rather than inference.** Observations are about what you can see or hear while inferences are about the assumptions and interpretations you make from what you see or hear. Focus on what the person did and your reaction.
  - Example (or use one of your own): “When you didn’t respond after the customer answered your question, the customer had to ask, ‘Are you there?’ to make sure the line hadn’t dropped” (observation) vs. “you were rude to the customer” (inference).
  - Ask for participants to give you an example or two.
- **Focus on behavior rather than the person.** Use adverbs to focus on behavior since they describe actions rather than adjectives which describe qualities.
  - Example (or use one of your own): “When you asked the customer about their current plan, they had barely started to respond before you asked your next question” (behavior) vs. “You were too talkative with the customer” (person)
  - Ask for participants to provide an example or two.
- **Watch out for feedback overload.** If you give a team member too much feedback, they are likely to become confused about what they need to do. Or they might feel overwhelmed and stop trying since it seems like too much to change. Instead, keep your observations focused on 1-2 behaviors—the behaviors that are most critical to the failure or success of the moment. For instance, in a customer contact, if you can identify the single behavior or moment in the contact when things went wrong and focus on that (rather than all the subsequent failures that followed from that moment), you will often find that the subsequent failures are addressed through the focus on the one critical moment. If that goes away, there are no cascading failures that follow.

# Speaker Notes – Slide 27

## Activity

If training in person, just have people pair up with someone near them and quickly tell each other one smart observation they might make in a coaching session. They may want to think of a recent coaching session and what they could have done differently.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

# Speaker Notes – Slide 28

## Ask Questions and Listen

- **Focus on “what” rather than “why”:** Questions that begin with “why” are difficult questions as they are about conjecture and concepts. “What” questions often have more concrete answers than lead to people envisioning themselves doing something different in the near future. For example, instead of asking “Why do you think you should do that?” ask “What could you have done instead at that moment?”
- **Be a thinking partner.** As a thinking partner, your role is to help the other person process their thoughts and feelings, not to give them advice or an answer. You are focused on helping them use their own creativity and resources to move beyond their mental or emotional blocks and solve their own problems.
- **Be quiet.** Once you have made your observation or asked a question, be QUIET. Resist the urge to fill any silences. Give the other person plenty of time to consider and react. This helps give the other person more time to talk themselves, which is what you want.
- **Listen with your whole body.** Whether in person or remotely, give the other person your full attention. Avoid multi-tasking (especially remotely when it is so easy to disguise what you are doing), It can help focus your attention if you take brief, sporadic notes of what the other person is saying, just don’t worry about accurately capturing every word as that then becomes a distraction.
- **Empathize:** Empathy establishes the interpersonal connection that makes coaching possible. You want to not only comprehend their point of view but also experience their emotions—at least to an extent. Just be sure that you don’t jump to comparing your issue to theirs, or problem-solving, or being overly positive. You are not lowering the standards when you express empathy. Empathizing with their difficulties is a first step towards helping them learn from setbacks. Once you’ve acknowledged their struggle and feelings, the other person is likely to be more open and responsive to making improvements.

This slide also contains a list of sample questions that are good questions to ask during coaching sessions. Know that you don’t have to have all the answers or be the expert on everything in a coaching session. Instead, you need to be able to connect with people, to inspire them to do their best, and to help them search inside and discover their own answers.

# Speaker Notes – Slide 29

## Activity

If training in person, just have people pair up with someone near them and quickly tell each other their one question.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

# Speaker Notes – Slide 30

## Make a plan TOGETHER

TOGETHER is the key word. As coach, remember, it's not your job to tell the other person what to do. This does not develop buy-in and trust and engagement. This is the team member's action plan, even if you do have some actions you need to do (like follow-up on training or resources, or devise a role-playing exercise for practice, or make a connection with another team member who can help, etc.).

- As the coach, you can make suggestions, but they really need to be suggestions (as opposed to thinly veiled directions) that the team member can decline.
- You both want to document each action and the expected completion date.
- Both of you want to be clear on what you expect. The more specific the actions can be, the better.
- Make sure that the team member agrees on all of the actions and that you are both of the same mind on what needs to improve. If not, the team member is not going to put much effort into the action plan.

# Speaker Notes – Slide 31

## Summarize

To wrap up the coaching session, summarize what was discussed and the actions to be taken. This is another good time to make sure everyone is clear on expectations.

Thank the team member for their time and attention and encourage them in their efforts to get better. Don't forget to express thanks!

# Speaker Notes – Slide 32

## After the Session

- First, you want to document the topics discussed during the session (if you took some short notes, these will be helpful) and the agreed upon actions from the session.
- You also want to document any actions you need to take – put a reminder on your calendar or a sticky note on your computer monitor, or go ahead and look something up, contact someone, or do some other action.
- Any reminders you want to make for yourself on things to follow-up on in the next session or topics for future sessions should be noted in your documentation.
- The documentation should be short and brief. It should take only a few minutes to complete. If it takes a while, you might be too detailed in your notes.
- Keep your documentation private. These are your notes and not for public consumption. You can keep them electronically, but not where everyone else can access them. If your system has a place for you to make notes, make sure to be judicious in what you record if other people might access it. You want to be honest, but you don't want to betray people's trust.
- You should also take a few minutes to reflect on your own performance in that session. What did you do well? What could you do better? Reflect and take notes for yourself so you can get better at coaching.

# Speaker Notes – Slide 33

## The Conversation Activity (5 minutes)

Here are the five parts of the coaching conversation. They are also in your workbook. Take a few minutes and for each part, write down the most important thing you want to remember.

Give them a few minutes to do this. You can choose to do this as a group, calling out important items for each part. Or they can work with a partner or two to make note of the important points. They should make their notes in the chart in their workbook.

# Speaker Notes – Slide 35

## Coaching Tips

- **Look for excellent outcomes:** Too often inexperienced coaches will focus solely on what people did wrong. Coaching then devolves into the policeman looking for people “breaking the law.” That’s quickly demoralizing, and people will eventually feel like they can’t do anything right. So make a point to tell them what they are doing right. Look for what they do with excellence and acknowledge those things.
- **Share your reactions:** Don’t just tell them how well they performed but describe what you experienced at the moment of excellence. Say things like, “This is how that came across for me,” “This is what that made me think,” “Did you see what you just did there?” Your personal reaction makes it much more personal to the team member and will make a greater impact on them.
- **Be conversational, not confrontational:** Keep things calm and collaborative by choosing a good time and place, managing emotions, focusing on the behavior, communicating your positive intent, asking for input and listening, responding with a solutions-focused mindset, and describing the positive outcome of the desired behavior.
- **Don’t talk too much:** It’s so easy to jump into the conversation with your agreement and then keep on talking. You have to be consciously aware of letting the other person do most of the talking. That’s why you ask questions and then keep quiet. You really do want to hear what they have to say.
- **Ask rather than tell:** It’s been said: “Bad managers tell employees what to do; good managers explain why they need to do it; but great managers involve people in decision-making and improvement.” Be a great manager. Your team is smart and capable, let them show you just how smart and capable. The “telling” approach often leads to repeat telling which often makes us a less effective coach. You want to ask great questions—not leading questions, not obvious questions. But real questions to which you want a real answer.
- **Encourage small incremental changes:** Baby steps are still movement in the right direction and are often more doable than giant steps. Celebrate these small wins and be sure to recognize them along the way.

**If time allows,** ask participants for their best coaching tip.

# Speaker Notes – Slide 36

## Becoming a better coach

If you want to be a better coach, there are four essential coaching skills you should seek to get better at.

- **Listening** as it helps build better relationships and helps team members feel understood.
- **Building trust** so that team members are more receptive to performance feedback and guidance.
- **Being supportive, encouraging, and motivating** as these traits can make people feel good, creating positive morale, and driving productivity.
- **Able to deliver praise and feedback.** Your team members crave both of these.

A technique that is often used to improve coaching is periodic Triangular Coaching. In this techniques

- **An observer sits in on a coaching session.** This observer is an experienced coach and is just observing, not participating. They should not respond to any direct questions or interject any comments into the coaching session. They are just there to observe.
- **Explain what is happening at the beginning of the session.** This is the one place the observer might speak to say hello. But you do want to explain that the observer is here to observe you, the coach—not the team member being coached. Also make sure to introduce the observer.
- **The observer may take brief notes.** It is perfectly acceptable for the observer to make some brief notes during the session. It just should not be enough to become a distraction to the coaching session itself.
- If possible, **the observer tries to sit in on three different coaching session** so that they have more complete observations to share.
- Then the **observer provides feedback to the coach.** This would normally take the format of a dialogue, just as any good coaching session.
- It is then the coach's responsibility to use the feedback to get better. Being observed once a quarter or at least twice a year (at three different sessions each time) helps you, as a coach, continue to get better at coaching. And you're setting a good example for your team.

# Speaker Notes – Slide 37

## Activity

If training in person, just have people pair up with someone near them and quickly tell each other their one question.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

# Speaker Notes – Slide 39

Ask for class to call out four critical things they remember for these topics from the workshop.

# Speaker Notes – Slide 40

What are the parts of the coaching conversation?

Have participants call out each part and you then *[CLICK]* to show that part.

# Speaker Notes – Slide 41

ASK,

What do you need to do after a coaching session?

What is a coaching tip you most want to remember?

What are the essential coaching skills?

How can Triangular Coaching make you a better coach?

# Speaker Notes – Slide 42

## Action Plan

Have everyone complete the action plan in their workbooks. This should only take a few minutes. When they are done, they should share with one other person the action they will take as a result of this training. (Virtually, they can do this through private chat with one other person in the workshop or they can chat it to everyone.)

Make your final comments and thank everyone for participating today. If you have an evaluation for them to complete, ask them to turn that in before leaving (in person) or complete it before getting offline (virtually).