



# TRANSITION TO LEADERSHIP

PARTICIPANT WORKBOOK

## Session 8: Coaching and Mentoring

## Introduction and Housekeeping

### Lesson Objectives

In today's session, we will:

- Discuss coaching, mentoring and buddying
- Explore the GROW Model of Coaching
- Analyze mentoring as a tool to empower and build teams and individuals
- Reflect on your own coaching and mentoring skills and succession planning skills
- Explore ways of tracking coaching and mentoring in your organization.

### Instructional Schedule

We will meet on Fridays as per the following schedule from 1:00 p.m. until 4:00 p.m.

Date	Module	Topic
	1	Leadership Styles
	2	Critical Thinking
	3	Change
	4	Delegation
	5	Conflict
	6	Trust
	7	Emotional Intelligence
	8	Coaching Skills

## Knowledge Assessment

1. What does coaching mean to you?
2. How does coaching differ from mentoring?
3. What are the fundamental skills of coaching?



# What is Coaching, Mentoring and Buddying?

Coaching is:

Mentoring is:

Buddying is:

<b>Mentoring</b>	<b>Coaching</b>
<ul style="list-style-type: none"><li>• Relationship tends to be long term</li><li>• Development driven – holistic approach to career development</li><li>• More informal on an as-needed basis by the mentee</li><li>• Mentee learns from the mentor who is more experienced</li><li>• Agenda is set by the mentee; mentor supports</li><li>• Outcome of the relationship can shift and change over time</li></ul>	<ul style="list-style-type: none"><li>• Relationship short-term (6 months – 1 year)</li><li>• Performance driven – designed to improve the professional's on-the-job performance</li><li>• Traditionally more structured with regular meetings</li><li>• Coaches hired for their expertise in a given area</li><li>• Coaching agenda is co-created</li><li>• Outcome from a coaching agreement is specific and measurable</li></ul>

## Informal Coaching for Managers

- Be patient and change your perspective
  - Take time to explore the work and responsibilities of your team members
  - Are they overloaded? Are they struggling in some areas?
  - Recognize that more junior (and younger) employees may have different demands, attitudes and see the world differently than senior, experienced people including managers
- Be aware of people's moods
  - Employ your emotional intelligence skills to ascertain where your coachee is
  - Recognize small changes in behavior and body language – may indicate time for a coaching conversation
- Ask for permission before coaching
  - You may recognize the perfect opportunity for informal coaching but it could be at a time when the person least wants it
- Coach – don't manage or direct
  - Avoid offering advice or direction and calling it coaching
  - Saying “I think...” may be an indicator that you are not coaching but rather directing.
  - Ask question instead and use active listening techniques to help the coachee identify solutions
- Use informal moments to make the best use of time
  - Eg. times like sitting in the break room, at the end of a meeting or while loading products onto the shelves
  - The conversation may lead to a set time to meet and focus on a specific issue

## Skills Required for an Effective Coach

Communication

Questioning

Emotional intelligence

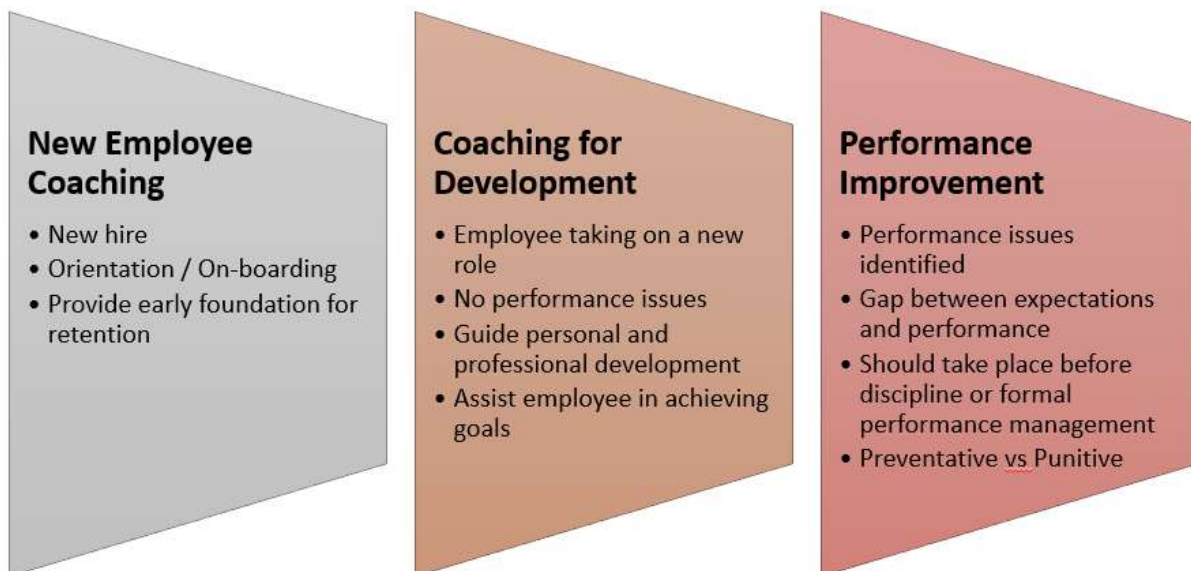
Developing trust

Others? \_\_\_\_\_

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## Common Coaching Applications



## How Coaching Can Help Your Team Members

- Identify career goals, and develop plans to achieve them
- Improve their time management and organizational skills
- Find the right work-life balance
- Make better decisions
- Develop skills to work more effectively
- Reduce stress
- Build more productive work relationships
- Think positively

### Some Causes of Performance Issues

Knowledge or skills

Process

Resources

Motivation

Culture

## 2 Rules of Coaching

The first rule of coaching

**- Must have a fundamental belief that people can achieve whatever they believe is achievable**

The second rule of coaching

**- Continually raise that level of belief**

## Coaching in Performance Management

Coaching does not replace regular performance management but instead is supportive of that process. Employees should never be surprised by what they hear in a formal performance review. If coaching is employed, then any deviations from performance should have been raised with the employee with an effort to determine how to get them back on track. A manager can employ good coaching techniques to help get the employee back on track.

## Coaching in Performance Management

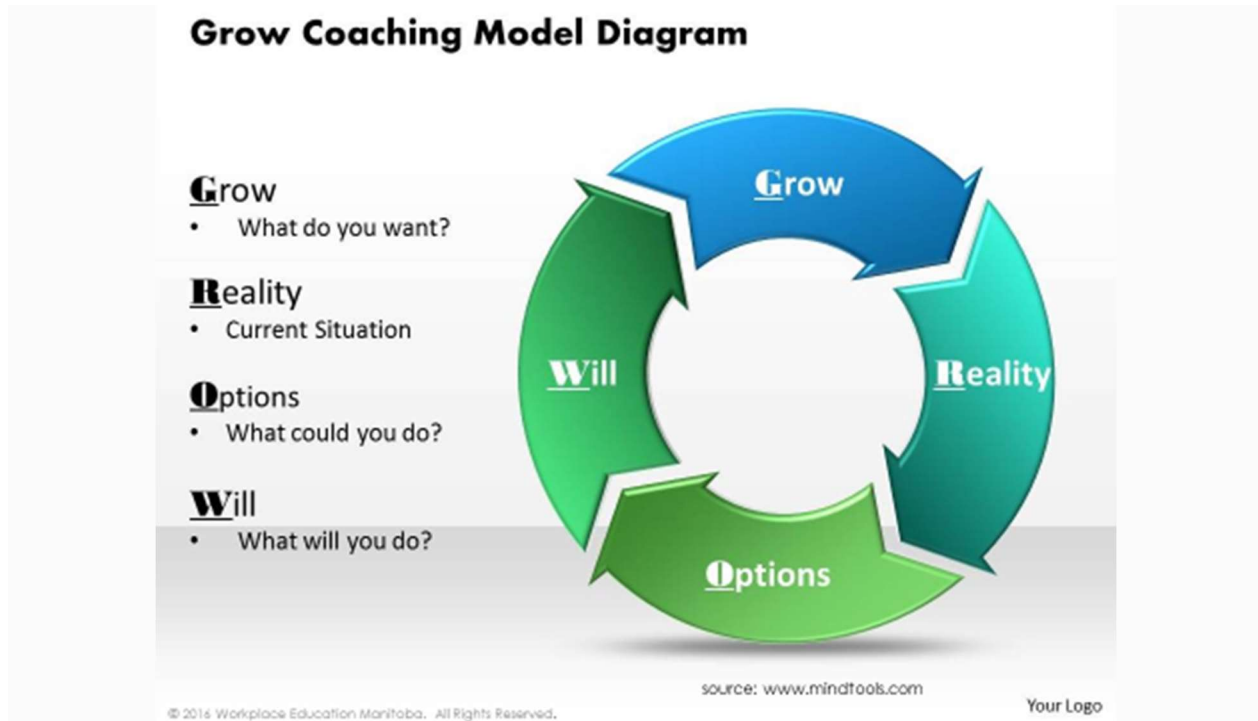


<b>Coach</b>	<b>Coachee</b>
<ul style="list-style-type: none"> <li>• Initiates partnering conversation around boundaries, pace and directions of sessions.</li> <li>• Asks questions to bring out employee's perspectives, desired outcomes, learning and relevant critical information.</li> <li>• Consciously uses employee's responses to develop powerful questions and observations to help create forward movement for employee.</li> <li>• Creates a safe space for employee to develop his/her possibilities.</li> <li>• Holds employee accountable for his/her own progress</li> </ul>	<ul style="list-style-type: none"> <li>• Commits to and trusts in the coaching process</li> <li>• Takes ownership for his/her progress</li> <li>• Is open, honest and willing to share with the coach</li> <li>• Is willing to discover new self-awareness</li> <li>• Listens to the coach's observations, determines how to use them, or determines to disregard them</li> <li>• Makes commitments to action and follows through</li> <li>• Is accountable for his/her own actions, growth, and progress</li> <li>• Partners with the coach to identify roadblocks and ways to remove them in order to move forward</li> <li>• Cooperates fully in the coaching process or discusses why cooperation is not possible</li> </ul>

**Tips for Building Trusting Coaching Partnerships**

- Suspend your agenda
- Stop and listen especially when peoples' emotions enter the conversation
- Convey empathy for the challenges employees are facing
- Ask how well you have understood their views and feelings
- Do what you say you are going to do – follow through

## How to Use the GROW Model



To structure a coaching session using the GROW Model, take the following steps:

### 1. Establish the Goal

First, you and your team member need to look at the behaviour that you want to change, and then structure this change as a **goal** that she wants to achieve.

Make sure that this is a SMART goal: one that is Specific, Measurable, Attainable, Realistic, and Time-bound.

When doing this, it's useful to ask questions like:

- How will you know that your team member has achieved this goal? How will you know that the problem or issue is solved?

- Does this goal fit with her overall career objectives? And does it fit with the team's objectives?

## 2. Examine the Current Reality

Next, ask your team member to describe her current reality.

This is an important step. Too often, people try to solve a problem or reach a goal without fully considering their starting point, and often they're missing some information that they need in order to reach their goal effectively.

As your team member tells you about her current reality, the solution may start to emerge.

Useful coaching questions in this step include the following:

- What is happening now (what, who, when, and how often)? What is the effect or result of this?
- Have you already taken any steps towards your goal?
- Does this goal conflict with any other goals or objectives?

## 3. Explore the Options

Once you and your team member have explored the current reality, it's time to determine what is possible – meaning all of the possible options for reaching her objective.

Help your team member **brainstorm** as many good options as possible. Then, discuss these and help her decide on the best ones.

Typical questions that you can use to explore options are as follows:

- What could you do? What ideas do you have?
- What if this or that constraint were removed? Would that change things?
- What do you need to stop doing in order to achieve this goal?
- What obstacles stand in your way?

#### 4. Establish the Will

By examining the current reality and exploring the options, your team member will now have a good idea of how she can achieve her goal.

That's great – but in itself, this may not be enough. The final step is to get your team member to commit to specific actions in order to move forward towards her goal. In doing this, you will help her establish her will and boost her motivation.

Useful questions to ask here include:

- So, what will you do now, and when? What else will you do?
- What could stop you moving forward? How will you overcome this?

Finally, decide on a date when you'll both review her progress. This will provide some accountability and allow her to change her approach if the original plan isn't working.

### Case Study: Julie

You're helping a team member, Julie, achieve her goals using the GROW Model.

Julie says that she would like a promotion to team leader within the next two years. This is a **SMART goal** – it's specific, measurable, attainable (as she already has one year of experience, and there are several team leader positions in her department), relevant (both to Julie's overall career aspirations and the team's mission), and time-bound.

You and Julie now look at her current **reality**. She's in an entry-level position, but she already has some of the skills needed to be team leader. You brainstorm the additional skills that she'll need in order to be successful in a team leader role: she needs more experience of managing other people, and experience dealing with the international department. She also needs to continue performing well in her role, so that she'll be considered for a promotion when one is available.

You then both review her **options**. To get the experience she needs, she could lead a small team on a small project. She could also spend time in the international department.

Finally, you establish **the will**. As her manager, you offer to let her lead a small team on a minor project. If she performs well, she can take on additional projects with more responsibility in the future. Julie must also approach the international team to arrange to

spend time in that department, and continue performing well in her current role. You agree to review her progress in three months' time.

Source: [www.mindtools.com](http://www.mindtools.com)

Using the example case study and what we have learned today, brainstorm some questions you could ask Julie at each stage?

**1. Establish the Goal:**

**2. Examine the Current Reality:**

**3. Explore the Options:**

**4. Establish the Will:**

## Questions to Apply the GROW Model

### 1. Establish the Goal:

- Agree on topics for discussion
- Agree on specific objectives for the session
- What is important to discuss from your point of view?
- What would you like to achieve in the meeting?
- How can we make the most of the time we have?
- How would you like to begin?

### 2. Examine the Current Reality:

- Invite self assessment
- Offer specific feedback
- What factors are working for/against you at this time?
- What effects do these factors have? Any other factors relevant?
- What is your perception of the situation?
- What will it take to be successful?

### 3. Explore the Options:

- Invite the employee's suggestions
- Offer suggestions carefully
- Ensure choices are made
- What steps have you taken? What have you tried so far?
- What ideas do you have? Any alternatives?
- Who can help?
- What are the benefits and pitfalls of the options you have generated?

- Which idea would you like to act on?

#### **4. Establish the Will:**

- Plan detailed actions on a timeframe
- Agree on what supports will be given
- What are your next steps?
- When will you do what?
- How will you stay committed?
- How can I support you?
- Closing thoughts?

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## **Review Transition to Leadership Series**

### **Session One – Orientation Module**

#### Session Objectives

- Explore the Workplace Education Manitoba Essential Skills model
- Discuss Leadership and the expectations that come with it
- Reflect on your ability to work with others
- Examine your own leadership responsibilities.

### **Session Two – Module 1- Leadership**

#### Session Objectives

- Discuss the differences between leadership and management
- Explore the various leadership styles
- Reflect on your own leadership styles
- Explain self-directed leadership

- Distinguish between transactional and transformational leadership.

### **Session Three – Module 2 – Critical Thinking**

#### Session Objectives

- Discuss lateral thinking, the Six Thinking Hats, the 8D Model of Problem and other tools for thinking outside the box
- Engage in discussions related to thinking skills and leadership
- Discover Socratic questioning and how to apply it
- Analyze the 8D approach to problem-solving
- Discuss the need for leaders to think critically.

### **Session Four – Module 3 – Phases of Change**

#### Session Objectives

- Discuss the phases of change
- Discuss ways of guiding and leading teams through each phases of change
- Analyze your organization's and your own readiness for change
- Analyze real-life examples.

### **Session Five – Module 4 – Effective Delegation**

#### Session Objectives

- Discuss delegation and look at how it is a critical leadership skill
- Explore factors that impact effective delegation
- Differentiate between tasks that can be delegated and those that cannot
- Reflect on the challenges of delegation
- Reflect on your tasks as leaders and identify how you can delegate and maximize potential.

## **Session Six – Module 5 – Understanding Conflict Management**

### Session Objectives

- Discuss conflict management, conflict resolution, and workplace conflict
- Reflect on your own conflict management style
- Explore the role of a leader in managing conflict
- Differentiate between various types of conflict and what causes them
- Learn to choose the appropriate conflict management tools.

## **Session Seven – Module 6 – Building Trust**

### Session Objectives

- Explain trust and why it is important for organizational success
- Explain the 5 Waves of Trust, core behaviours necessary, and the high trust behaviours associated with leadership
- Explore ways to identify deterioration in organizational trust  
Develop an action plan to build high-trust behaviours.

## **Session Eight – Module 7 – Emotional Intelligence**

### Session Objectives

- Define and discuss emotional intelligence and why it is essential when working with others
- Discuss Daniel Goleman's Emotional Intelligence Model and how it relates to the work environment
- Identify ways of building your own EI skills
- Discuss empathy and the importance of seeing multiple perspectives
- Develop an action plan to work on self-awareness and Emotional Intelligence.

## **Session Nine – Module 8 – Coaching and Mentoring in the Workplace**

### Session Objectives

- Discuss coaching, mentoring and buddying

- Explore the GROW Model of Coaching
- Analyze mentoring as a tool to empower and build teams and individuals
- Reflect on your own coaching and mentoring skills and succession planning skills
- Explore ways of tracking coaching and mentoring in your organization.

## Identify Personal Learning Goals

### Individual Learning and Development Plan

#### Instructions

Review all the topics covered and all that you have learnt in this program. Consider your individual and organizational learning goals and complete your IDP. Refer to handouts from the earlier sessions as needed.

#### Remember that the purpose of your IDP is to:

- Set priorities for your career development;
- Identify goals that are mutually beneficial to you and your employer;
- Select the best available activities and the resources needed to help you achieve your goals;
- Set a timeline for achieving your goals.

#### The sections of the IDP form are:

##### Developmental Goals for the Next Year

What do you want to achieve?

##### Relationship of Goals to the Organization's Goals

How will the organization benefit from your development goal?

### Knowledge, Skills, Abilities to be Developed

What will you learn?

### Developmental Activities

What are the best development activities for the goals that you have identified?

### Resources

What resources are required for you to engage in the development activities – time, funds, help from others, and so forth?

### Date for Completion

IDPs are usually written for a one -year period, but some employees prefer to set short-term (1 year), medium-term (2 years), and long-term (3 years) goals. The longer time frame may be necessary if, as a goal, you want to earn a degree or certification in your field.

## Individual Learning and Development Plan

Name: \_\_\_\_\_

Developmental Aims for the Next Year (Use the Goal Sheet to check if Goals are SMART or SMARTER)	Relationship of goal to the Organization's Goals	Knowledge, Skills, Abilities to be developed	Developmental Activity	Resources	Date for Completion
<i>Goal 1:</i>					
<i>Goal 2:</i>					

<b>Goal 3:</b>					
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\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's Signature

\_\_\_\_\_  
Date

## Resource List

### WEBSITES / ARTICLES

- [http://cdn2.hubspot.net/hub/41809/file-25897295-pdf/docs/coaching\\_vs\\_mentoring\\_-\\_25\\_ways\\_theyre\\_different\\_-\\_2nd\\_edition.pdf?t=1474494265378](http://cdn2.hubspot.net/hub/41809/file-25897295-pdf/docs/coaching_vs_mentoring_-_25_ways_theyre_different_-_2nd_edition.pdf?t=1474494265378)
- [www.forbes.com](http://www.forbes.com)
- [www.mindtools.com](http://www.mindtools.com)
- <https://www.thebalance.com/how-managers-can-become-awesome-coaches-2275926>
- <https://www.marsdd.com/mars-library/coaching-strategies-and-mentoring-programs/>
- <http://topachievement.com/goalsetting.html>
- [www.goalsforall.com](http://www.goalsforall.com)
- <http://communicationtheory.org/management-by-objectives-drucker/>

### BOOKS

McChesney, Chris and Covey, Sean; The 4 Disciplines of Execution: Achieving Your Wildly Important Goals

Covey, Stephen and Blanchard, Ken; Discover Your Inner Strength

Gudger, Jacob; SMART Goals: The Ultimate Goal Setting Guide Kindle Edition

Canfield, Jack; The Success Principles

Covey, Stephen; Speed of Trust