



COACHING TOOLKIT

INTRODUCTION

Coaching is most effective when integrated into an organization's framework in order to position the organization to achieve its business goals in a highly competitive, fast-paced, and uncertain business environment. A strong coaching culture provides organizations with a distinct advantage as it relates to attracting and retaining talent, developing leaders, and sustaining technical excellence.

The purpose of this Toolkit is to help organizations move toward adopting a coaching culture.

What does a coaching culture look like, and how do I build my own coaching organization? (Pages 2-3)

Coaching engages individuals in discovery-based inquiry that stimulates creative thinking, elicits new insights, uncovers limiting behaviors, and increases individual accountability. For coaching to be successful, both the coach and the individual receiving the coaching should be willing to assess their strengths and weaknesses and embrace the orientation of their particular role. Coaching may be done organizationally or individually.

As a coaching recipient, how can I get the most benefit from working with a coach? (Pages 4-5)

As someone in a coaching role, how can I be more effective and helpful to others? (Pages 6-8)

©2016 The Ohio Society of CPAs ALL RIGHTS RESERVED - To reprint or license please contact cpe@ohiocpa.com

WHAT IS A COACHING CULTURE?

A coaching culture integrates coaching into the organization's method of operations. Coaching occurs in all directions (peer-to-peer, manager-to-supervisor, team leader-to-team member) so that employees at all levels have the opportunity to grow their skills and value, and reach their professional goals. A coaching culture should:

- Support organizational performance by aligning individual and team goals/learning plans with the mission
- Support the development of future leaders
- Address a specific problem area or challenge
- Value learning, creativity and continuous improvement

Coaching should not be used as a remedial action or correctional performance improvement tool.

BUILDING YOUR OWN COACHING ORGANIZATION



Create a Vision

- What are the benefits of becoming a coaching organization?
- How would this culture support organizational goals and values?
- What are the expected outcomes for individuals, teams, and the entire organization?



Assess Organizational Readiness

- Has the organization allocated money toward development programs in the past?
- Does the culture support open dialogue?
- Are managers measured on their approach to staff development?
- Are there other learning structures in the organization?
- Does HR provide value to employees or simply maintain compliance?



Develop an Implementation Plan

- Identify coaching champions and establish a task force.
- Build your own coaching organization or incorporate outside experts.
- Define and outline coaching tools, dialogue, and supporting infrastructures.
- Develop a project plan. Determine costs and how they will be budgeted/tracked.
- Identify who will own and administer the intervention/transformation.
- Determine the key benefits and success factors and institute the necessary measuring tools.
- Assess political climate within the organization. Plan for contingencies, power channels, decision-maker involvement, etc.



Measure and Sell the Benefits

- Consider key stakeholders, link your agendas, and develop negotiation strategies for ownership.
- Relate the coaching infrastructure components to other pertinent programs.
- Carefully plan short-term and long-term costs. Develop and sell the cost-benefit analysis.
- Prepare support materials to guide your implementation plan.
- Install tools for measuring key success factors of the coaching organization. Publicize these widely.

Adapted, with permission for general use, from *Organizational Coaching: Building Relationships and Programs That Drive Results* by Virginia Bianco-Mathis, Cynthia Roman, and Lisa K. Nabors. Alexandria, VA: ASTD Press, 2008.

COACHING RECIPIENT'S "COACHABILITY"

One of the foundational tenets of coaching is that discovery-based inquiry stimulates creative thinking, elicits new insights, uncovers unproductive or limiting behaviors and habits, and increases individual accountability. For this to occur, individuals are expected to embrace a coachable orientation.

"Coachability" is measured by how coaching recipients interact with their environment. Coachable individuals will:

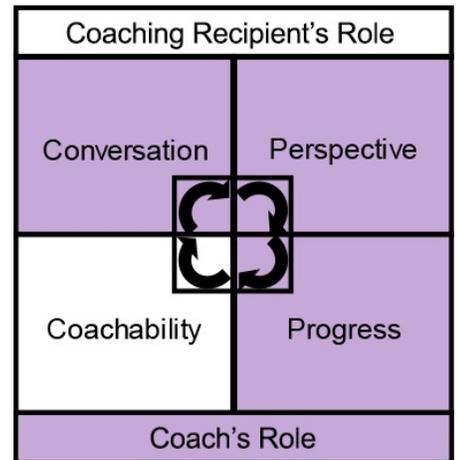
- Take responsibility.
- Take initiative.
- Be open and honest.
- Be assertive.
- Ask for feedback and suggestions.
- Network.
- Clarify objectives.

UN-COACHABILITY TRIGGERS

A person in an "uncoachable" mindset:

- Does not listen to ideas offered by others
- Staunchly defends current ideas and approaches
- Appears to be non-receptive or not interested in coaching
- Does not engage in conversations about development and interprets suggestions to develop new skills as criticism
- Is dismissive of others

There are common triggers that reduce an individual's coachability at various times. Review the list below and think about whether any of these are your "uncoachability" triggers.



I have become less coachable:

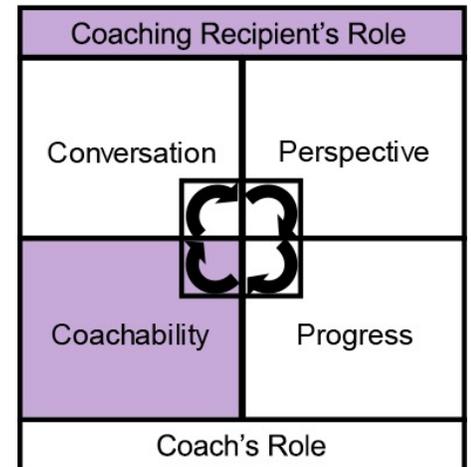
- when coaching is offered too early in the day	- when the coach is a peer
- when coaching is offered too late in the day	- when the coach ranks higher on the org chart
- on Monday/first shift of the week	- when the coach ranks lower on the org chart
- on Friday/last shift of the week	- when the coach comes across very direct/strong
- in a group setting	- when the coach talks in generalities
- when I'm on my way somewhere	- when the coach shares too many details
- when I'm on break	- when the coach speaks too formally
- when I'm distracted or multitasking	- when the coach is long-winded
- when I'm cold/hot/tired	- when the coach tells me what I'm doing wrong
- when the subject is personal	- when the coach doesn't listen to me
- when I feel stressed/confused/unprepared	
- when I feel like I have to defend myself	
- when I'm not interested in the topic	
- when I don't think improvement is needed	

COACHING CHARACTERISTICS

Conversation

Coaching occurs in conversation, so conversation is the core tool you have for providing great coaching. To enhance conversations:

- Listen deeply. Show interest. Focus on the recipient.
- Ask great questions and create pull.
- Use a rallying cry that “rallies.”
- Be evocative—encourage reflection and bring out pride.
- Be provocative—excite, fascinate, and intrigue.
- Be memorable in some way.
- Make people feel great—bring out their awesomeness.
- Improve relationships and connection.
- Be catalytic - help people see the way forward.
- Provide advocacy—pave the way with some assistance.



Perspective

One of the most valuable coaching services you can provide is to help the coaching recipient adopt a healthy perspective about his/her situation. This is most needed when an individual feels overwhelmed, unsuccessful, stuck, hassled, unconfident, or unworthy. Ask them about their:

- Available information
- Multiple points of view
- Worries
- Interconnectedness
- Capacity and skills
- Potential alternative paths

Progress

Many coaching recipients do not lack vision, but some fail to produce satisfactory results due to inadequate progress. Coaches enable progress by helping them create a plan, manage agreements, and inspire action. Ask the following questions:

- What's the next step? What's the first action for this step?
- What requests could you make to move things forward?
- What conversations could you have, and with whom, to get things moving?
- What can I do to help jumpstart your progress?

COACHING SELF-ASSESSMENT

	STRENGTH	NEEDS WORK
I can focus on what someone is saying and take it in with interest.		
I let the other person do most of the talking.		
I do not interrupt others when they talk.		
I can help uncoachable people open up and become coachable.		
I let the other person own the discussion and determine how I can best help.		
I feel pretty comfortable approaching someone and starting the discussion.		
I ask great questions that engage others and help inspire bigger thinking.		
I help others discover and define where they want to go to attain their goals.		
I know how to coach someone who is feeling stuck or overwhelmed.		
I feel comfortable helping others broaden their perspective when they are unable to see what's slowing their progress.		
I help those I coach create an action plan that they own and feel highly motivated to implement.		
I feel comfortable managing agreements to hold others accountable for their intentions and promises without it seeming like I have taken over ownership.		
I excel at helping others discover their strengths and apply them.		
I am able to "shape-shift" to meet the needs of those I coach (show up in a variety of ways depending on what they most need).		

COACHING DIALOGUE TECHNIQUES

9 dialogue techniques:

1. Acknowledge first; then raise questions and concerns.
2. Reframing
3. Give an example, tell a story, or use an analogy.
4. Reaffirm joint purpose
5. Craft solutions
6. Offer ideas
7. Determine difficulty and rate importance
8. Paint a picture
9. Focus on action and avoid the trap of “right vs. wrong”

ASK BETTER QUESTIONS

Broadly, questions fall into 2 categories: Closed-Ended (Yes/No/Number answer) and Open-Ended (require a more complete answer). Use open-ended questions when a coaching recipient is:

- Stuck and not sure how to move forward
- Learning new tasks or skills
- Enthusiastic about a new idea or needs your help to create a plan for how to approach their work

It is also helpful to have this type of inquiry conversation when the coaching recipient has only partial information or could benefit from another point of view. Great questions are open-ended and go beyond to provoke bigger thinking.

EXAMPLE QUESTIONS

- What are a few things that you'd really like to talk through?
- What are the next few steps you need to take where you have little motivation to take action?
- Where is a place you want to go in your career but aren't sure the steps to get there?
- What is a deadline that is set that would benefit from a well thought out plan?
- Where are you losing the most time right now that you'd like to get back?
- Where do you want to be at the end of 1 year, 5 years, 10 years?
- What is your most/least productive time of day?
- What skills are you missing to move into a role you'd love to have?
- What strengths do you have that are underused?
- Where are you operating out of a weakness?
- What needs to change in order to have a perfect day?
- What do you want to do but just don't have the confidence to do?
- What is a system in your work that needs to be created or revised?

CRITICAL THINKING WORKSHEET

Coaching Recipient: List a problem or challenge you are struggling with.

Coach: Use these questions to “interview” the coaching recipient. Take a few notes about his or her responses (you will return the form to the performer). It is fine if you don’t get through all the questions. Go where the energy is.

Information: Do you have the information you need to move forward? Do key stakeholders have the information they need?

Points of View: Have you collected input from various points of view? If you could partner with anyone, who would you engage? How does the “customer” view this problem or challenge?

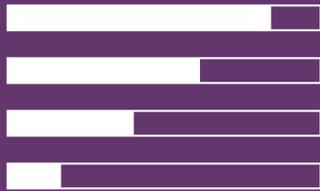
Worries: What are you most worried about? Are your worries justified?

Interconnectedness: How are other functions or processes connected to this one? How could you strengthen the alignment between these parts?

Capacity: Do you have the capacity needed to be successful? How might you increase capacity? Where are the bottlenecks?

Alternative Paths: What would make it OK to pursue another avenue or approach? Who is most invested in this path? What’s their/your interest? Will another path meet the interest?

Original material by Lisa Haneberg, © 2015 Association for Talent Development (ATD). Used or adapted with permission.



THE
OHIO SOCIETY
OF **CPAs**
ADVANCING THE STATE OF BUSINESS

www.ohiocpa.com

800.686.2727