

Tools for a Coaching Program Checklist

- Template: Creating a Coaching Program
- Template: Coaching Program Development
- Coaching Program Proposal - Generic
- Leadership Coaching Statement of Work (SOW) - Generic
- Information Paper/Research on the Program
- Slide Deck on Your Coaching Program
- Interview Guidelines for Hiring a Coach
- Logistics of working with a coach for HR/Manager/Admin
- Coaching Guidelines and Agreement between Client and Coach
- Worksheets: Public Goal(s)/Actions, Session Focus, Completion
- Coach checklist for each coaching session
- Leadership Path Branding - Do and Be Worksheets
- Additional List of References - Books, Articles, Videos, Links

Creating a Coaching Program

	Coaching Session	Coaching Relationship
Start		
Middle		
End		
Impact, Value, Benefits, Why: Now Later		

Think of a typical coaching example or your intended type of coaching.
 For each block answer –

1. What does the coach/you do?
2. What does the client do?
3. What guidelines, rules, tools are typically used?
4. What are the outcomes, feelings, actions, possibilities?
5. What reporting, administrative, operational actions need to happen?

Coaching Program Development

Steps	Coach <ul style="list-style-type: none"> To do Needs Tools Resources 	Client <ul style="list-style-type: none"> To do Needs Tools Resources 	Client's Manager/Others <ul style="list-style-type: none"> To do Needs Tools Resources 	Results/ Outputs <ul style="list-style-type: none"> Client Team Company Coach
Start				
Plan				
Do				
Done				

1. What are the Steps called? (steps, stages, phases, gates, start/middle/end)
2. What strategic change or problem are you solving?
3. What is the name of the result, the impact, the benefit, the pain being removed?
4. Who needs what, and when? (client, coach, manager, human resources, logistics)?
5. What tools and material are needed for each step?
6. What's next after this program? (check-in, feedback, sustain)
7. What is the name of this program?



Leadership Coaching Proposal/Statement of Work

Summary of Intent:

To provide leadership coaching services. Coaching is targeted at top-performing and high-potential employees that the company wants to invest in. This is a comprehensive program developed to achieve the desired outcomes. There are four distinct steps, yet the overall program provides flexibility based on ongoing feedback. The expected duration is 6-12 months.

Start Engagement and 360-degree Feedback Assessments/Scope – Step 1

An initial broad coaching goal will be established at the start. Typically, a 360-degree feedback assessment will be administered. The feedback will come from members of an employee's immediate work circle. It can also include, in some cases, feedback from external sources, such as customers and suppliers or other interested stakeholders. The 360 process can take 2-6 weeks. In most cases the 360 is online and the selected interviews are face to face.

In some cases, the initial goals must be approved and reviewed by the manager before the start of the 360. The results of the 360 will validate the goals or indicate the need to modify them. The results will also allow for more specific coaching goals to be established.

Goal Setting and Plan – Step 2

The leadership skills and behaviors that call for development will be established as the focus of the coaching. Specific measurable goals and a method for determining if they have been achieved will be outlined in a plan. A plan can include support from other personnel, mentors, manager, trainings, books and articles.

Ongoing Coaching – Step 3

Coaching will be done on a consistent and ongoing basis throughout the engagement. The face-to-face coaching will take place at a location convenient to both. Coaching will be scheduled at regular intervals, typically twice a month. This schedule allows 12 hours of coaching spread out over 6-12 months, including the initial assessment review, the midpoint review, and final report-out. The coach will keep track of coaching hours.

Feedback, Progress Update, and Sustaining Progress – Step 4

At the midpoint, the coach will create a progress report, with feedback from select participants in the 360 process as needed. Employees have the option of sharing this report with their manager. There will be a final review with of the employee's progress using feedback from select 360 participants. A status report and suggestions for continuing improvement will be created.

Additional Notes on the Engagement and Coaching:

Access to the Coach - Support is available in between coaching sessions in the form of brief phone calls, emails, and resources. A prompt response is assured.

Adherence to Coaching Standards - All information discussed between client and coach is confidential. The coach is a certified professional with a PCC or equivalent coaching designation and adheres to the ethics of the International Coaching Federation: www.coachfederation.com

Late Arrivals/Missed Appointments - The coaching cost is a program fee, not a per coaching session fee. If an appointment must be changed, we request at least 24 hours notice. If an appointment is missed or rescheduled without giving 24 hours notice, the time may be forfeited. We will be on time for appointments and request that the employee is, too. If the employee is 15 minutes late, we will reschedule the appointment. If lateness is unavoidable, we request contact before the start time of the appointment.

Having a coach is a partnership. Clients are encouraged to take responsibility for their role in this partnership. It is vital that the coach know what is needed and wanted and to know what is working and not working in the coaching partnership. All Star Leadership coaches hold the promise to be unconditionally constructive and also to challenge the client. Our coaches will ask permission to be bold and forthright in the coaching process, and trust that they will be told if they go too far.

Costs:

Complete Leadership Program =

Leadership Program without a 360-degree assessment =

Continuation of the completed Leadership Coaching Program, 10 hours =

Day rate, not including expenses/materials =

Payments over X\$ will be split into two equal payments.

If the employee changes jobs or leaves the company, the amount charged will be pro-rated.

Signature - Our signatures on this page indicate our acceptance of the above proposal:

_____ Date: _____

Name - Authorized Signature

_____ Date: _____

Star Dargin, as Owner/Founder of Star Leadership LLC and not as an individual

Generic Coaching Program Coaching Guidelines and Agreements

Version 2.0

Access to the Coach - Support will be available in between coaching sessions in the form of brief phone calls, emails, and resources. A prompt response is assured. The coaches will respond to any agreed-upon form of communication such as emails or phone calls within 24 hours.

Adherence to Coaching Standards - All information discussed between client and coach is confidential. The Public Goal will be shared with the designated Human Resources Manager and the Direct Manager. The coach is a certified professional coach or equivalent and adheres to the ethics of the International Coaching Federation: www.coachfederation.com

Late Arrivals/Missed Appointments - The coaching cost is a program fee, not a per coaching call fee. If an appointment must be changed, 24 hours notice is required. If one session is missed or rescheduled without giving 24 hours notice, the time may be forfeited. If for any reason you will be late, contact the coach ahead of time and jointly agree on a new date and time if needed.

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The coaching will be primarily focused on:

1. Establishing Public Coaching Goals
2. Providing situational support and skill building
3. Creating and starting on a Leadership Path

Additional Considerations needed for Coaching to be Successful:

My signature indicates that I agree to the above terms.

Client:

Date:

Coach:

Date:

Public Goal Worksheet

The public goal is the externally observable, measurable, focus of the coaching. The public goal must be in support of the overall goal of the coaching program.

Coaching Program Goal Samples

To ensure that coaching clients are successful in their (insert strategy goal). Examples are:

- To successfully transition from individual contributor to manager
- To successfully lead new projects in the company
- To successfully handle new situations, skill building, and challenges within the framework of what it means in the context of their job
- To enhance and build management skills in the areas of: Communication, Delegation, Team Building, Conflict Management, Presentation, Project Management.

Examples of Public Goals and Measurements

Improving communication with their team (currently at 5/10, goal is 8/10)

Client listens more and talks less (i.e. not talking for 50% of any given meeting)

Client understands and appropriately uses “I”, and “we” (i.e. knows when to direct and when to collaborate)

Client successfully delegates a task/project

Client knows each person’s style and how best to communicate with him or her

Improving conflict resolution

Client learns a resolution method and uses it successfully – give examples of a conflict

Improving presentation skills to senior managers

Client reduces fumbling and nervousness and presents with clarity, conciseness while addressing bottom line issues

Areas to Focus on:

How Achievement of Goal will be Measured: (numbers, stories, situations)

The Public Goal must be shared with, and approved by, the designated Human Resource Manager, the Client and his or her Manager

Approval will be indicated by: 1) Email sent from the client to _____, 2) Signing of the form and submitting to _____, 3) Verbal agreement between _____

Guidelines for Coaches in a Leadership Program

Before Coaching Session ONE

- Coaching is approved and purchase order is in place
- Appropriate contracts have been handled
- Make sure Client has:
 - Coaching Guidelines and Agreements
 - Leadership Path, Plan, and Branding
 - Coaching Focus Form
 - Public Goals Form

Session 1

- Review, get agreement, and obtain signature on the Coaching Guidelines and Agreements
- Establish how coaching will work best
- Establish how you will communicate (email, text, google docs, phone)
- Schedule the remaining dates/times for all coaching sessions
- Establish one Public Goal to be shared and approved with the Direct Manager and HR
- Create private goals if needed/wanted between coach and client
- Introduce the Leadership Path, Plan, and Branding Form – assign it as homework (or review and ask questions if they did it before the first session)
- Assign homework – including getting wording and approval of Direct Manager

Session 2 – 9

- Hold client accountable for homework and getting approval of public goals
- Ask if they did their homework, and what lessons were learned
- Determine if they shared/received approval from their manager and HR on public goals
- Establish coaching goal for each session, ensuring it relates to the overall public goal and supports any private goals
- End by having them summarize the session and their actions/lessons
- End with homework assigned

Session 5

- Ensure that progress and challenges are reported to Direct Manager and HR

Session 10

- Complete and review Coaching Completion Form
- Complete Leadership Path and Plan
- Create action to continue the learning and development
 - What did you learn and how can it impact your job/team?
 - What are you willing to try?
 - What are your next steps?
- Share your observations of their accomplishments
- Acknowledge and congratulate them for completing
- Ensure New Manager reports back the completion and status to the Direct Manager and HR
- Determine if there are next steps to continue the coaching and/or check in at a later date

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Guidelines for Hiring a Coach

Read each Coach's Bio and Coaching Material.

Get as clear as you can about what your challenges are and what you want from coaching.

Interview at least 3 coaches.

What is their background and experience?

What is their coaching style and personality?

How do they work with clients?

Can they give you an example of working with someone to build a skill such as _____?

What are their biggest challenges in coaching someone like you?

What would a typical coaching session with you be like?

What type of additional information, resources, and homework/action items will they assign?

Some coaches will do mini-coaching sessions in an interview.

Have they worked with anyone else here that you can speak with?

From the International Coach Federation on Hiring a Coach
<http://coachfederation.org/need/landing.cfm?ItemNumber=979>

Additional Resources for Leaders and Managers

Classic Leadership, Management, and Coaching - Books and Articles

- *Leadership and the One Minute Manager*, by Ken Blanchard – Easy to read and do
- *Management Skills for New Managers*, by Carol Ellis – Basic for a new manager in corporations
- *The Leadership Challenge*, by James Kouzes and Barry Posner - Classic, in its 4th edition, extensive
- *Discover Your True North: Becoming an Authentic Leader*, by Bill George. Practical, with lots of examples
My review: https://www.amazon.com/review/R10Q31SDAQ17WM/ref=cm_cr_rdp_perm
- *Leadership from the Inside Out: Becoming a Leader for Life*, by Kevin Cashman
- *101 Biggest Mistakes Managers Make and How to Avoid Them*, by Mary Albright and Clay Carr
- *First Break All the Rules: What the World's Greatest Managers Do Differently*, by Marcus Buckingham and Curt Coffman
- *Co-active Coaching: New Skills for Coaching People toward Success in Work and Life*, by Laura Whitworth, Henry Kimsey-House, and Phillip Sandahl (1998)
- “What Makes a Leader?,” Harvard Business Review article, by Daniel Goldman
- “What Leaders Really Do,” Harvard Business Review article, by John Kotter
- “Making Intangibles Tangible: Adapting Project Management Tools for Coaching,” paper by Star Dargin
<http://starleadership.com/wp-content/uploads/2013/07/FinalPMIPaper2013NewOrleans.pdf>

Working with Different types of people - Books

- *Taking Flight*, by Michaela DePrince. My review:
http://www.amazon.com/review/R25DMFVGYKA12Z/ref=cm_cr_rdp_perm?ie=UTF8&ASIN=0133121291
- *Quiet: The Power of Introverts in a World that Can't Stop Talking*, by Susan Cain
- *Managing Difficult People: A Survival Guide for Handling Any Employee*, by Marilyn Pincus

Teams and Trust - Books and Articles

- *The Speed of Trust: The One Thing that Changes Everything*, by Stephen Covey
- *Overcoming The Five Dysfunctions of a Team: A Field Guide for Leaders, Managers, and Facilitators*, by Patrick Lencioni
- “Why Some Teams are Smarter Than Others”:
<http://www.nytimes.com/2015/01/18/opinion/sunday/why-some-teams-are-smarter-than-others.html?smid=nytcore-ipad-share&smprod=nytcore-ipad&r=1>
- Top Six Practices for Managing Virtual Teams:
<http://www.corpedgroup.com/resources/pm/6BestPracticesMVT.asp>

Communication - Books

- *The Power of Communication: Skills to Build Trust, Inspire Loyalty, and Lead Effectively*, by H.F. Garcia
- *Conversational Intelligence: How Great Leaders Build Trust and Get Extraordinary Results*, by Judith Glaser
- *Emotional intelligence: Why It Can Matter More Than IQ*, by Daniel Goleman
- *Do You Talk Funny?: 7 Comedy Habits to Become a Better (and Funnier) Public Speaker*, by David Nihill
- *TED Talks: The Official TED Guide to Public Speaking*, by Chris Anderson

Personal and Business Success - Books

- *Outliers: The Story of Success*, by Malcolm Gladwell
- *Triggers*, by Marshall Goldsmith
- *What Got You Here Won't Get you There*, by Marshall Goldsmith
- *Kiss, Bow, or Shake Hands: The Bestselling Guide to Doing Business in More than 60 Countries* by Terri Morrison and Wayne Conaway
- *Winning the Brain Game: Fixing the 7 Fatal Flaws of Thinking*, by Mathew E. May