

Coaching Conversation PREP FORM

The **goals** of this coaching session:

1.	
2.	

What are their **three strongest factor combinations**?

1.	
2.	
3.	

What is **valuable** about this?

1.	
2.	
3.	

Their **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

My **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

(Farthest right and farthest left on self graph)

The areas I need to **adjust** are:

1.	
2.	

Examples of **how** to adjust:

1.	
2.	

Coaching Conversation PREP FORM

State **purpose**:

Questions to ask:

Share **observations**:

Their **ideas**:

☐ Agreement?

☐ Willingness?

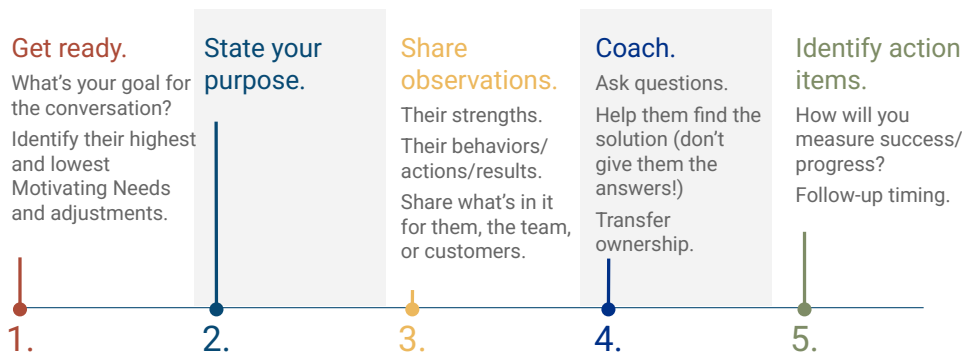
Actions/next steps:

Owner:

By when?

Success/progress measures:

EFFECTIVE COACHING CONVERSATIONS



HOW OFTEN?

At least once a month, especially for **High Performers**.

HOW LONG?

15-20 minutes is ideal.

GOOD COACHING IS INTENDED TO

- Increase performance. NOW.
- Improve retention (especially high performers).
- Enhance engagement.
- Develop.

COACHING BEST PRACTICES:

Designed for the person being coached (PI, motivating needs)

Uses assessments, data, other tools (BA, CA, performance data)

Focuses on driving results – in the near term

Has strong clarity of purpose, approach

Involves asking good questions to create ownership

BEFORE THE CONVERSATION

- Identify 1-2 concise objectives for the conversation
- Review their 3 **strongest behaviors** and 1-2 **Motivating Needs**
- Determine how you will adjust your behaviors and show up to make the conversation effective

DURING THE CONVERSATION

Prepare **deliberate and specific observations** and feedback:

- What I've observed...
- The impact is...
- This matters because...

Ask **questions to get them engaged** in the conversation (**Hint: let them talk**)

- What stands out for you about what I observed?
- What's the real challenge here for you?
- What thoughts do you have?

ACTION PLAN

- Have employee come up with ideas for a "go-forward" plan and decide on the best one together
- Create specific objectives that can be measured
- Determine employee's role and leader's role
- Set follow up date with clear expectations