

# Steps to Coaching

## **Step 1: Name the purpose or challenge and describe the desired outcome.**

Many people tend to underestimate the importance of this step. After all, when everybody recognizes there is a problem, the only thing left to do is to come up with solutions. Right?

Wrong! That is the best shortcut to a bad solution. This is one time when it pays to dwell on the negative. The way you name the challenge determines in large part how you will try to solve it -- and your chances of succeeding.

## **Step 2: Assess and brainstorm possible approaches.**

It is necessary to identify the strengths and gaps in the situation. There are two basic principles for effective brainstorming. The first is to uncouple the idea from the person offering the idea. For example, you supervise Maria, but in a brainstorming session, you are equals. The second principle is: do not judge any idea until you have listed all the options you can come up with. Sometimes the "dumbest" ideas or the ones said in jest trigger really creative ideas that can work.

After potential approaches are determined, it is time to discuss, sort and critically review those possible approaches.

## **Step 3: Develop a plan of action.**

Create a simple "to do" list. Next to each task, note who will take responsibility for making sure it gets done.

## **Step 4: Set deadlines.**

Without a specific deadline, a task may never become a priority, so it may never get done or it may be done in haste when somebody thinks to ask about it. Set a deadline for each item on the "to do" list. Better still, ask the caseworker to write down on their calendar exactly when they intend to do the task.

An advantage to setting deadlines is that it saves time and worry. If someone just makes a mental note to take care of something, they are likely to think about it from time to time and worry about getting around to it. That can distract them from other responsibilities. Plus, the more they worry about a task, the more likely they are to

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put it off and then finally to do it quickly just to get it off their mind. Think of setting deadlines as signing a contract with the worker.

### **Step 5: Establish standards/criteria for evaluation.**

Make sure you know what outcomes are expected and how you will know when you get them. Standards will help the worker to know if they have succeeded.

### **Step 6: Facilitate action.**

The question is "What can you as a supervisor or manager do to help the worker succeed?" The operative word here is "facilitate," which means "to make it easier." Avoid the temptation to help too much. There are times when it might seem best just to take over a task. Nonetheless, that is about as far away from coaching as you can get.

Let staff know that you are there if they need you. Determine your level of involvement based on the readiness of the worker.

### **Step 7: Follow through.**

Set a time to get back together with the worker for a progress report. The idea is not to create an endless chain of meetings to follow up on meetings. However, the supervisor or manager needs to ensure accountability, to keep well-intentioned plans from getting lost in the day-to-day shuffle and the crisis of the moment. It is a way of collaboratively enforcing the deadlines. Staff who might be hesitant to come forward to talk about questions or concerns are more likely to bring them up when they report on their progress.

This may seem like overkill or too much structure to apply to a small issue. The supervisor or manager will have to be the judge. All of the steps are not needed in every situation and the process can be used informally when the situation warrants. Be careful about skipping steps, though, especially the first few times the process is tried.