

# Accelerating the Path Forward

## How Coaching Helps Employees, Managers and Organizations

### Sophie Oberstein, Presenter

Sophie Oberstein founded Full Experience Coaching in 2006. Previously, she had been involved in the growth and development of individuals in organizations for over fourteen years as Employee Development Manager for the City of Redwood City, as a training manager for Citibank, N.A.'s retail bank in the New York Marketplace, as a training consultant for Right Management Consultants, and as a presentation coach. She has been an instructor in the MBA program at Drexel University in Philadelphia, Pennsylvania and in the undergraduate program at Menlo College in Atherton, California. Additionally she has served as President of the Greater Philadelphia Chapter of the American Society for Training and Development and is an extensively published author. Her book, *Beyond Free Coffee and Donuts: Marketing Training & Development* is available from ASTD Press, which will publish her *10 Steps to Successful Coaching* in 2009. Her professional coaching certification is from the Coaches Training Institute (CTI).



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Pre-Conference Workshop  
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### Agenda

*10 Steps to Successful Coaching*  
ASTD Press, 2009

- 1 Clarify & Prepare for Your Coaching Role
- 2 Remove Obstacles
- 3 Create Your Coaching Relationship(s)
- 4 Learn About Your Coachee
- 5 Agree on What You Want to Accomplish
- 6 Coaching Using the Power of Possibility
- 7 *Locate or Create Coaching Exercises\**
- 8 *Re-Align When Things Go Bad\**
- 9 *Maintain Positive Changes\**
- 10 Complete Coaching Cycle

\* These steps will not be covered in today's session.



## Workshop Agreements

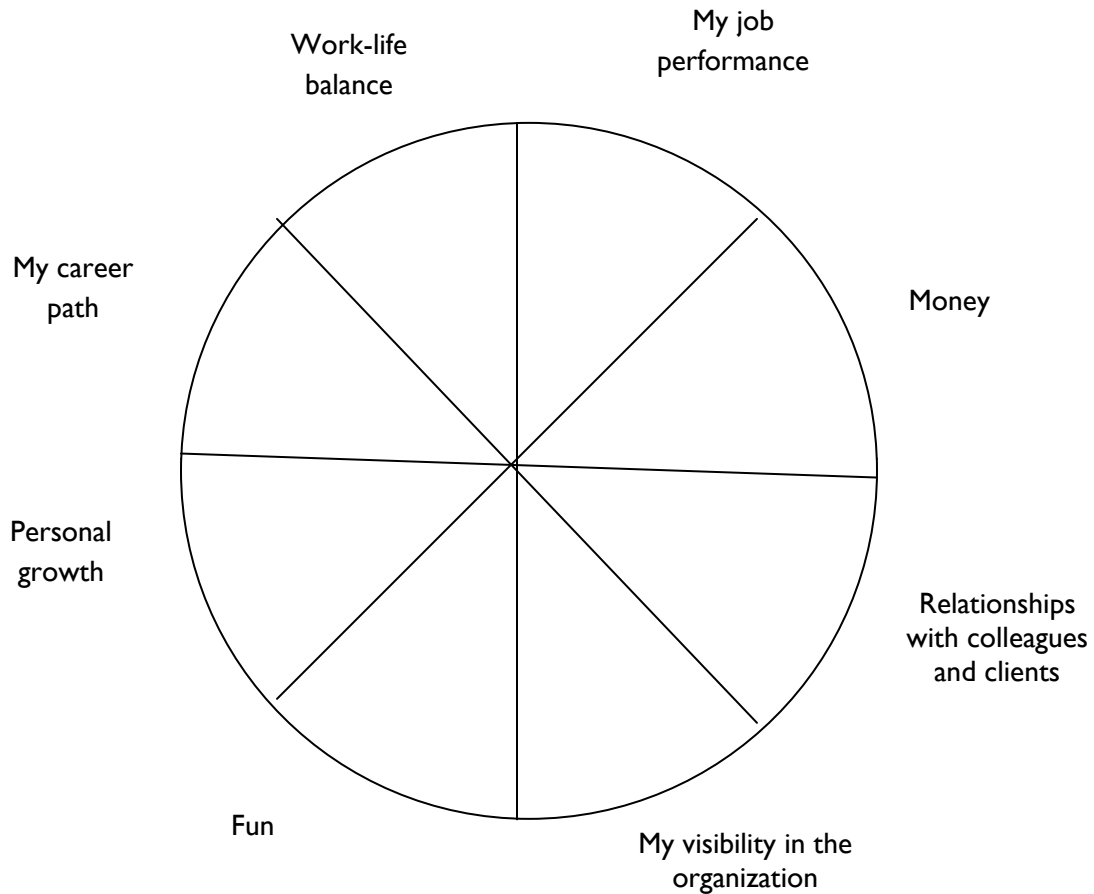
Participating in a coaching workshop is making a commitment to your personal growth – Congratulations for taking the time out to make that commitment to yourself!

In the learning environment we need to create for this session, several agreements will need to be made. These are described below, and I will ask that all participants express their agreement with these principles at the start of the session. If I've missed any agreements that you need to have in place in order to feel comfortable participating, we can add those in as well.

<b>Confidentiality</b>	Every participant needs to trust that whatever she chooses to share in our group is not going to be shared outside of the group. Without this confidentiality, participants will not feel safe to contribute fully to this process, so it's sacred. You, of course, are free to share with whomever you want whatever you want that you personally get out of this program.
<b>Respect</b>	We all have a part in creating a safe and supportive environment in which we can learn things about ourselves. Respect for each other includes listening openly and non-judgmentally, and will allow us to feel comfortable sharing our ideas, questions and feedback with one another.
<b>“Soft Focus”</b>	Soft focus is my term for the balance between covering what's on the agenda and going with what comes up and is important to participants. I request your permission to call out when we are off agenda and steer us back to it when the group desires, as well as to cut off tangential conversations.
<b>Full participation</b>	You only have to share publicly what you are comfortable sharing in the safe, supportive environment. Feel free to take risks with this group - or not. Whatever you contribute adds value. Additionally, please watch your “air time” to ensure that others get their chance to fully participate.

Every workshop takes on a life of its own. I'm really looking forward to seeing how much we learn from each other, and what this process is going to be like for us. Thanks for joining me!

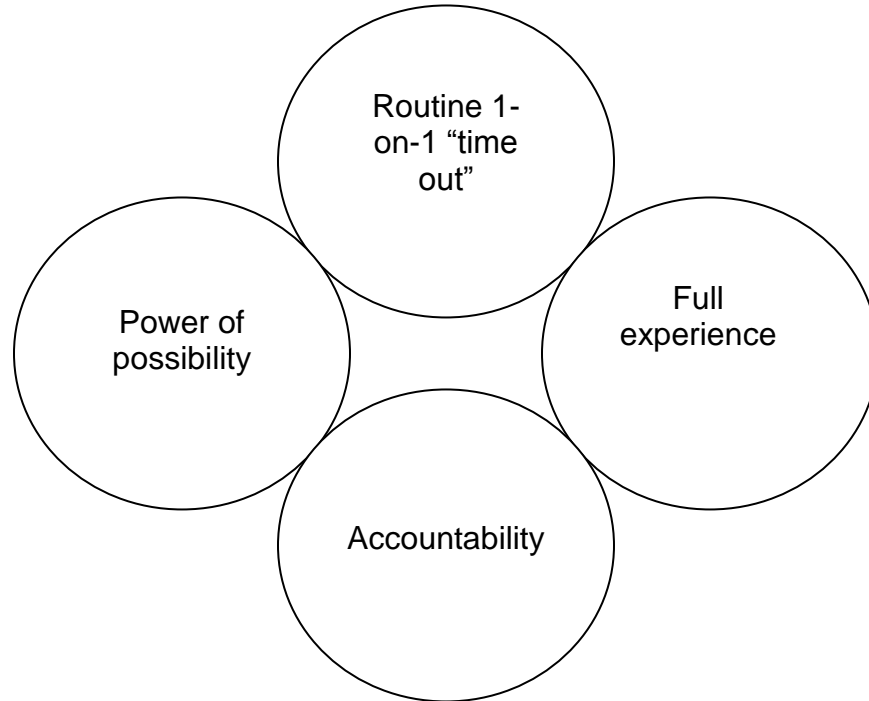
# Wheel of Life



- Rate your satisfaction with each aspect of your life on a scale from 0 (not satisfied) to 10 (most satisfied). Place a dot in each wedge to indicate your level of satisfaction where the center of the circle is 0 and the outer edge a 10.
- Notice the shape of the wheel you've created. Are you on a smooth or bumpy ride?
- Pick one area and describe to a partner what a 10 would look like in that area – What would be happening? Who would be around? How does it feel at a 10? What will life be like?

# Coaching

Coaching is a meaningful, accountable relationship created from routine one-on-one conversations about one's full experience and the power of possibility.



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...and what *isn't* Coaching?

**Myth #1.** Coaching is giving advice.

**Myth #2.** The value of a coach is her knowledge and experience.

**Myth #3.** The coach drives the coaching process.

## Coaching Trends

Then...	Now...
Punishment for “bad” managers	Perk for managers with potential; Retention tool for good managers
Provided by HR professionals, trainers, externally hired coaches	An essential leadership attribute
Stand-alone activity	Part of organizational initiatives, such as succession planning; used in concert with mentoring and organizational networking
Directive – focused on specific skills or direction	Directive or non-directive – emphasizing the learning process and on-going growth and development
Less known and understood; Membership in International Coaching Federation (ICF) just under 4,000 in 1999	Growing and more accepted profession; ICF memberships increased 423% to almost 12,000 in 2006



From “Trends in Leader Development and Succession” by Richard Wellins, in *Human Resource Planning*, June 1, 2006:

### **Finding 6\*: Leaders Benefit Greatly From Using Mentors or Personal Coaches**

51 percent of leaders report that they have used a personal coach or mentor.

The specialized attention of a coach provides leaders with an individualized diagnosis of needs, feedback, development planning, one-on-one training, and tracking of results. With such close attention, no wonder leaders who have used a coach or mentor find it valuable.

Most leaders with a coach or mentor (91%) find the experience provides moderate or great benefit for their careers.

*\* Of top ten findings from a global benchmarking study of more than 4,500 leaders from over 900 organizations*

# Coaching Self-Assessment

	<b>How am I doing in this area?</b>	<b>Goals / Notes in this area</b>
Self management	Poor – Fair – Good - Excelling	
Listening	Poor – Fair – Good – Excelling	
Being curious	Poor – Fair – Good – Excelling	
Asking powerful questions	Poor – Fair – Good – Excelling	
Refraining from giving advice	Poor – Fair – Good – Excelling	
Holding confidentiality	Poor – Fair – Good - Excelling	
Being present	Poor – Fair – Good – Excelling	
Making time consistently	Poor – Fair – Good – Excelling	
Giving constructive feedback	Poor – Fair – Good – Excelling	
Designing actions for coachee to take	Poor – Fair – Good – Excelling	
Planning and goal setting	Poor – Fair – Good – Excelling	
Establishing accountability	Poor – Fair – Good – Excelling	
Creating a coaching relationship through expectations & agreements	Poor – Fair – Good – Excelling	
Being flexible	Poor – Fair – Good – Excelling	
Establishing trust & intimacy	Poor – Fair – Good – Excelling	
Loving / appreciating your client	Poor – Fair – Good – Excelling	
Being open to your client's whole experience	Poor – Fair – Good - Excelling	
Thinking big for your client	Poor – Fair – Good – Excelling	
Providing recognition	Poor – Fair – Good – Excelling	
Reading a situation	Poor – Fair – Good - Excelling	

What skills (from the list above or elsewhere) do I have that will serve me well as a coach?

What aspects of coaching will be a stretch for me?

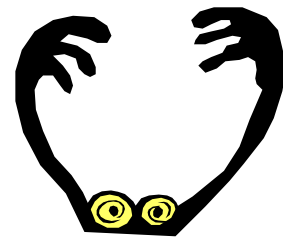
Which is the first area I want to work on?



## Gremlins

In coaching, we have a term for those voices inside your head that keep you from excelling or from trying something new. We call these gremlins. You probably have some gremlins right now about coaching. Are any of these voices in your self-talk right now?

- “Who am I to say I’m an expert / a coach?”
- “Someone else (*fill in the name here*) is better at coaching than me.”
- “I’ll make a fool of myself.”
- “I can’t handle when they ask questions I don’t know.”
- “I’m uncomfortable with confrontation.”
- “People at this level in the organization should be able to figure things out for themselves; Coaching shouldn’t be necessary at a certain level.”
- “I’m okay coaching around performance issues, but not personal issues – Those don’t belong in the workplace.”
- “I don’t have the time.”
- “Coaching won’t fly in my organization.”
- “This isn’t what I get paid to do.”
- “My employees don’t like this management style.”
- “I’ll lose my authority.”



## Managing Gremlins

- What is your gremlin’s name?
- What belief or myth about coaching does this gremlin personify?
- What’s true about this gremlin’s message?
- What’s untrue about this gremlin’s message?
- What belief do I want to replace this gremlin voice with?
- What do I want to honor instead of this gremlin?

## Removing Obstacles in Your Organization



Review the list of organizational factors below and place a check mark beside any that you would answer “yes” to.

✓		<b>At your organization...</b>
	1.	Is it a high-stress environment, which goes unrecognized by management?
	2.	Are big and new ideas encouraged?
	3.	Does senior management seem <u>un</u> aware of the benefits of coaching?
	4.	Are there multiple opportunities for giving and receiving feedback?
	5.	Has a coaching program been tried with little lasting success?
	6.	Are employees held accountable?
	7.	Are most performance reviews overdue?
	8.	Is on-going learning and development a priority?
	9.	Does the organization tend to ignore, circumvent, or terminate problem employees?
	10.	Do good internal role models exist at all levels in the organization?
	11.	Does the organization tend to think it's HR's role to deal with “people” issues?
	12.	Is a balance in work and life encouraged?
	13.	Are training opportunities reserved for those at higher levels in the organization?
	14.	Is confrontation in the workplace constructive?
	15.	Is turnover high?
	16.	Are high potential employees recognized and provided with resources for growth?
	17.	Is the organization bureaucratic rather than innovative?
	18.	Do individuals know how they fit in to the organization and how to build a career there?
	19.	Is the last time your team has gone on a retreat or social activity more than six months ago?
	20.	Are there existing coaching relationships in the organization?

### Scoring:

For each check mark you gave to an even-numbered question, give yourself one point. For each check mark you gave to an odd-numbered question, subtract one point.

If your total score falls between 7-11:

If your total score falls between 2 and 6:

If your total score is 1 or less:



# Peak Experience

## **Coachee:**

Close your eyes and think about a time when you were completely excited by your work. When you woke up eager to get out of bed and in to the office; when you didn't even care whether you were getting paid to do what you were doing. This time doesn't have to be recent. It doesn't have to be in your current job or organization. And it doesn't have to be dramatic. It can be a simple moment when you just felt content at work. See that time clearly; notice what was going on around you, how you were feeling, who else was there, etc.



## **Coach:**

- Ask coachee to describe that time to you / to take you there
- As s/he is speaking, jot down values that you hear
- Show the list and ask, "Did I get it right?"
- Ask, "Are there any values I should add?"
- Have the coachee select the two most important values
- Ask her/him to describe what each of those two values means to her/him
- Have coachee rank the extent to which s/he is honoring that value on a day-to-day basis on a scale from 1-10.
- Ask, "What does a 10 look like?"
- Ask, "What can you do today to move closer to a 10?"

## 3-T Goals

**Tangible** (Detailed, Specific, How will we know this goal has been reached?, What will be happening when this goal is reached?)

**Time-bound** (By when will you do this?)

**Tied to meaningful outcomes** (What am I doing this in the service of? What values do I honor in doing this?)

Examples:

- *Three months from now, I'll have a system to follow up on calls and letters, I'll be on time, get all tasks accomplished, and have realistic goals for new projects. I choose to do all of this in the service of my value of being there for others..*
- *In order to deepen my relationship with Rodney, and to help him become more fulfilled in his job, I will ask him to work with me as my coachee by next Friday.*



## Accountability

Create a 3T goal with your partner from the “Wheel of Life” exercise by asking questions like:

- What specifically will you do?
- What will be possible / what will be happening when you've done it?
- By when will you do it?
- How will I know you've done it?
- Why are you doing it?

## Question Generator

What's..	..happening.. ..possible.. ..working.. ..needed.. ..your wish.. ..your role.. ..the sticking place.. ..not being said.. ..your choice.. .. important.. ..fun.. ..next..	..for you? ..right now? ..from this perspective? ..once you get/do that? ..in the big picture? ..for/in that meeting/interaction? ..for/in your team? ..as a leader? ..in five years?
Who..	..will do that.. ..is responsible.. ..do you need to be..	
How..	..will you do/get that.. ..will this work.. ..do you feel.. ..can you be (insert adjective here)..	

Powerful questions are short and curious, often naïve. Powerful questions stop people in their tracks and get them thinking.

...and what *aren't* we asking?

- “Why?”
- “Why don’t you...?”
- Questions about details.
- Close-ended questions
- Leading questions (*statements posing as questions*)
- Multiple questions



## Powerful Questions

- What kind of leader / coach / employee / parent / spouse / friend do you want to be?
- If resources were plentiful, what would you want to be doing at work right now?
- What would you like to be doing five years from now?
- What's your dream?
- If you had your choice, what would you do?
- What do you want?
- What would your life be like if you had that?
- When you are 95 years old, what will you want to say about your life?
- If we could wipe the slate clean, what would you do?
- What are the possibilities? What is just one more possibility?
- What about that is most important to you?
- What have you tried so far?
- How does this fit in with your plans / way of life / values?
- How can you find a way to have it be fun?
- How do you fit in to the picture?
- What really counts about your job?
- In the bigger scheme of things, how important is this?
- How do you suppose it will all work out?
- And if that fails, what will you do?
- What is stopping you?

**"The greatest gift is not being afraid to question."**

**~ Ruby Dee**



**"Eighty percent of American managers cannot answer with any measure of confidence these seemingly simple questions: What is my job? What in it really counts? How well am I doing?"**

**~ W. Edward Deming**

## Coaching benefits

To the organization	To the manager / coach	To the employee
<ul style="list-style-type: none"> <li>▪ Cost effective development that occurs on-the-job and is customized for each individual</li> <li>▪ Decentralized responsibility for developing employees</li> <li>▪ Manager – employee relationships are strengthened</li> <li>▪ When employees feel valued and confident, their productivity increases</li> <li>▪ Ensuring employees are doing work that is a good fit for them</li> </ul>	<ul style="list-style-type: none"> <li>▪ Develop skills and receive tools to coach his/her employees</li> <li>▪ Understand / embrace his/her role as a coach and assess his/her own coaching competencies</li> <li>▪ Enhanced working relationships with peers, immediate supervisor and direct reports</li> <li>▪ Attaining goals or results; performance improvement</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increased motivation and productivity resulting from personal attention</li> <li>▪ Opportunity to explore what his/her goals are and to plan how to achieve them</li> <li>▪ One-on-one confidential advice on issues affecting his/her career</li> <li>▪ Increased morale and job satisfaction</li> <li>▪ Increased confidence</li> <li>▪ Empowerment in discovering for themselves the real choices available to them, and the fulfillment that comes from doing work that honors their values</li> </ul>



*Go forth and explore the power of possibility...*