



Coaching for Performance

Workbook

Introduction

This booklet is prepared for a specific organisation taking on the Coaching for Performance Programme. It is not intended to be the definitive guide to coaching or managing, but to provide you with a useful language and set of tools to commence your journey in becoming more effective leaders of teams. There are three sections to this booklet; One describes the key principles behind how and why to coach for performance; Two is the toolkit, the processes, techniques and methods for coaching for performance; and the third section contains the planning and observer templates for practicing these techniques and processes.

This booklet is not called *managing for performance*, but *coaching for performance*. Managing could be described as the processes we put in place to manage the work tasks and activities. Coaching however, is an attitude or approach to developing the people for whom you are responsible. As coaches, effective managers of people use the problems and challenges that come up on the job as opportunities to build skills, behaviours and motivation for each individual within their team. A manager with the attitude of a coach, doesn't just solve work problems, they use these opportunities to develop strengths and competencies in their people. Within this context then, we will use the term "Team Leader" to address a manager, supervisor or anyone with direct reports. Additionally, employees or staff will be referred to as "Team Members".

We encourage you to practice the tools and skills described in this booklet and take this opportunity to develop yourself with skills for life, that will also benefit your team.

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1. Coaching for performance - key principles

The triad of the emotional contract

There are three contracts in place for each employee. Firstly, there is an employment contract between the organisation and the team member, secondly what is referred to as the "psychological contract". The psychological contract is the reciprocal extension of trust and discretion that creates a social exchange of obligations extending beyond those of economic exchange in the employment contract. The psychological contract is how the team member feels about working for the organisation, are they proud to say where they work..?

However, most organisations ignore what we refer to as *the triad of the emotional contract*, the third and possibly the most important contract (described in more detail on next page). Understanding this mental-model helps team leaders realise their responsibilities towards their team members and provides the mindset to develop effective, behavioral based relationships with their people. The reason most people leave a role is the declining quality of the relationship between the team member and their team leader (manager/supervisor). *"People don't change jobs, they change managers or supervisors..."*

There are two perspectives we can take to look at the relationship between the team leader and the team member, the "rights" of team members and the corresponding "responsibilities" of Team Leaders, as represented in the table below:

Team members	Team leaders, therefore need to...
...have the right to know what is expected of them	Gain agreement on performance standards
...have the right to know how they are performing	Provide opportunities for open, two-way communication on the achievement of the agreed standards of performance
...have the right to be developed	Provide opportunities for skill and knowledge development

Triad of the emotional contract describes the framework for establishing a relationship based on trust between the team member and team leader.

To develop a healthy emotional contract with their team member, the manager (team leader or supervisor) needs to proactively set up opportunities to:

1. Establish ongoing, two-way communication, that
2. Gains agreement on the specific standards of performance and (over-time) provides feedback on performance
3. Offer opportunities for the development of skills and knowledge.

The Triad of the Emotional Contract



Supportive management focusing on behaviour, actions and outcomes creates a foundation of **trust**.

Principles for establishing a foundation of trust

An important objective of managing teams is to realise the 'team potential'. Fully functioning teams can achieve far more than the collection of individuals. Unlocking the potential of teams requires building and maintaining a foundation of trust (Zenger-Miller 1998). As a manager and leader, ensure you embody the five principles of building and maintaining trust:

1. Focus on the situation, issue or behaviour, not on the person;
2. Maintain the self-confidence and self-esteem of others;
3. Maintain constructive relationships;
4. Take the initiative to make things better; and
5. Lead by example.

Further explanation to these five principles for establishing a foundation of trust with team members and within the team:

1. Focusing on the *person* is a form of finger-pointing and blame. The goal is to establish an environment of trust, to unite the team and enable effective work activity. When the Team Leader is providing an individual feedback, it is about the situation, the issue or observed behaviour, not the person. When the Team Leader is working with the team, who may be having some healthy disagreement, it is not about resolving who is right or wrong, but acknowledging other points of view and to focus the team on the issues related to the team's development and the process of improvement.
2. Continual improvement is based on trying new things, new behaviours and potentially making some mistakes. The Team Leader must maintain the self confidence and self esteem of the team members so that they can feel safe to try new approaches, make mistakes without being personally criticised. Team Leaders should acknowledge that change is often difficult and check in frequently with individuals to provide encouragement and support.

3. Team Members should be encouraged to establish new relationships across the organisation and collaborate with other teams. Team Leaders need to overcome an "us" and "them" mentality and value diverse points of view within the team.
4. Teams should be encouraged to objectively understand how they are currently performing, understand the results the team is working towards and focus on continual improvement opportunities. Individuals and Teams should be able to constructively assess how they are going, understand root causes, see trends and patterns and, take the initiative to make things better. Team Leaders can take a cross functional view of the team's work and expand assignments to improve skills and cross-collaboration.
5. Potentially the most powerful tool for Team Leaders, is to lead by example. Team Members watch and listen to everything the leader says and does - "are they really committed to our team..?", "are they just giving lip service to this stuff..?", "is the leader congruent, what they say and in their behaviours and actions..?" Mistakes are unavoidable for the courageous Team Leader, admit mistakes when they happen, learn from the mistake and share the learning with the team, it will encourage the team to feel they can do the same. Delegate where you can, let others lead team meetings, defer to the team's judgement from time to time so they can own their performance and outcomes. Stay focused on quality work and encourage positive team behaviours.

Background to motivational theory

Goal-setting theory of motivation

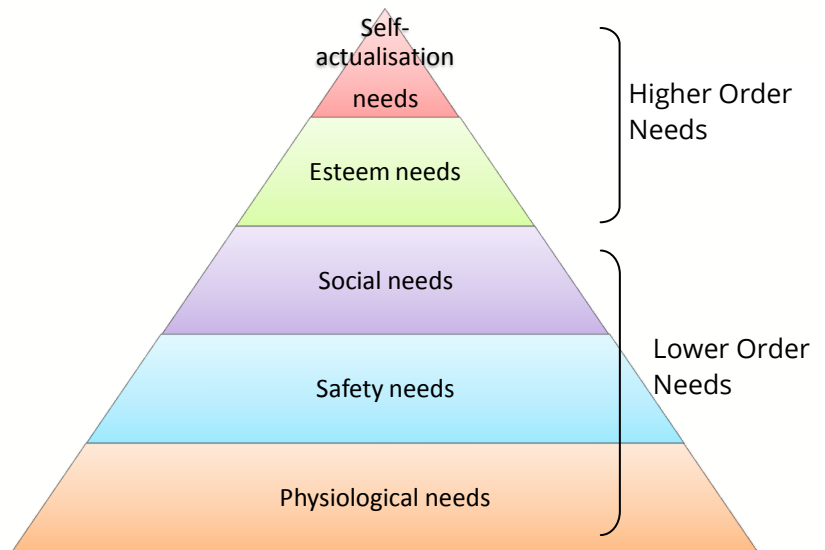
The theory says that specific and difficult goals can lead to higher performance. It is the process of formally establishing targets, objectives, or goals, that team members are accountable for achieving. We typically see this today in the forms of KPIs (that are actually a performance measure and an associated target). The goals themselves should be developed in a consultative and participative approach, with a focus on continually gaining feedback to monitor how the people are reacting to the goals.

Research has shown there are three key factors that influence the success of goal setting as a strategy for motivation;

- (1) goal commitment from the team member (that is, how committed is the team member to the goal itself);
- (2) adequate self efficacy or the willingness of an individual to produce output (the belief the person has that they can achieve the goal); and
- (3) the national culture of the people (for example, Americans and Singaporeans tend to be particularly goal focused) and by extension, the work culture.

Hierarchy of Needs

Abraham Maslow (1943 and 1954) developed the popular theory of a hierarchy of needs, the higher order of needs being self-actualisation and esteem and the lower order being social, safety and physiological needs. The Physiological needs address the most basic of needs such as, food, water shelter etc. Safety then looks at the needs for security and protection in the events of daily life. Social needs bring in the need for belongingness. The human need for love, affection, and a sense of identification with other people.



The next two Maslow refers to as the higher-order needs. The need for esteem of others, respect, prestige recognition, self-esteem and a personal sense of competence. The highest level is self-actualisation which is the need to fulfil one's self, to grow and use their abilities to the fullest extent.

This as a theory is useful in recognising there are different needs, however, it is rare that the needs literally move up the hierarchy in a step fashion.

The ERG Theory

Alderfer's theory states that there are three core needs, **e**xistence, **r**elatedness and **g**rowth. Existence needs are about the desire for physiological and material wellbeing. The need for relatedness is the desire for satisfying interpersonal relationships. And growth needs are concerned for the continued personal desire for personal growth and development. Whilst Maslow's theory suggests that, as a person realises their first level of needs they look then to the next level, Alderfer contends that more than one need can be activated at one time. By having all the needs operating simultaneously, the ERG theory seems to be a more useful model for understanding the team member's motivational needs than the Hierarchy of Needs.

The ERG theory reminds us that team members have needs and motivational forces at three, concurrent levels that relate to survival, personal relationships, and, personal growth and development.

This model for understanding the needs of team members, also links in with the triad of the emotional contract, in the following ways:

ERG Theory	Triad of the emotional contract...
...needs for existence, to survive	Provides for an agreed standard of performance that provides the team member with the clear knowledge of what is needed to <i>survive</i> in their role...
...need to relate to others	Providing open, two-way communication on the achievement of performance standards establishes a foundation of trust, and an effective relationship between the team member and the team leader...
...need for personal growth and development	The manager providing opportunities for skill and knowledge development, supports this need - but also re-enforces the other two needs as well.

It is a myth that money is the key motivator for individuals.
Sure, it is a hygiene factor but not a motivator.

Dan Pink¹ is just one of the many contemporary experts/writers who credibly discuss the problems with the outdated 'money is the motivator' thinking. People are far more intrinsically motivated to fulfil a purpose, have positive relationships and grow, than anything else.

Positively motivated behaviour "depends on three nutrients: autonomy, mastery and purpose. It is self directed...devoted to becoming better and better at something that matters. And it connects to that quest for excellence to a larger purpose... Science confirms that this sort of behaviour is essential to being human - and that now, in a rapidly changing economy, it is also critical for professional, personal and organisational success of any kind".

¹ For example - Daniel H. Pink, (2009) *Drive: The surprising Truth About What Motivates Us*, Riverhead Books

Personal Reflection:

Reflecting on the 'triad of the emotional contract' and the companion ERG Theory - think about a period of time at work where you felt high levels of job satisfaction, where you were really motivated and enjoyed what you were doing. Now attempt to break down your experience at that time...

- *How would you describe your relationship with your immediate supervisor/manager..? What did it feel like, what type of conversations did you have..?*
- *How would you describe your working relationship with others (in your team, or cross-team/departments)..?*
- *What was the work environment like that contributed to your need for personal growth and development?*

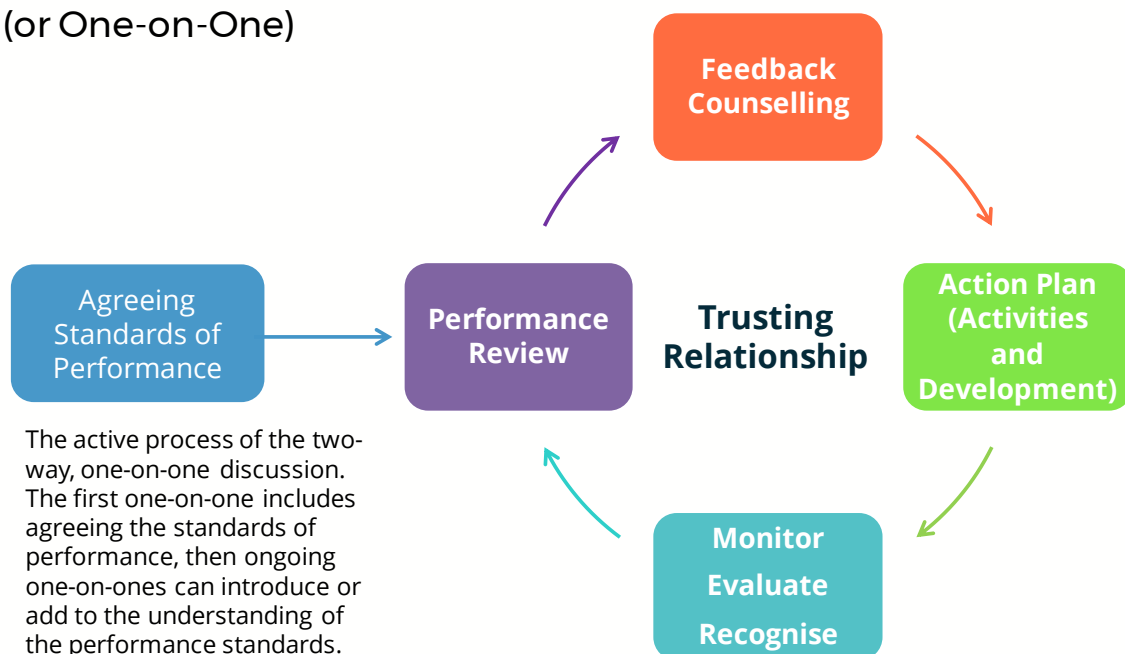
Now think about a time-period at work that you did not enjoy, or felt it was a struggle to be motivated - reflect on the components of the 'triad of the emotional contract' and the companion ERG Theory.... what was missing for you..?

2. Coaching for performance - toolkit

How to hold a regular performance discussion

This is a regular process where team leaders meet with team members to review performance, provide feedback and develop a plan for development. The first time this meeting takes place sets the performance standards (refer to the relevant section in this booklet, page 28).

The Regular Performance Discussion (or One-on-One)



The above process is applied as an agenda for a regular (weekly/fortnightly/monthly) meeting between the two people.

Primarily, the manager and team member meet to Review Performance, the manager can provide Feedback and Counselling, together develop an Action Plan for both the development of capabilities and the actions to be undertaken against objectives in the performance plan. A key part of the Review is to evaluate the extent of completed actions/effort from previous agreed action plan. Monitor, Evaluate, and Recognise occurs within the meeting, but also daily between the regular meetings.

Executed well and consistently, the regular performance discussion process provides motivation for team members by:

1. Providing a basis of trust between the manager and the team member;
2. Demonstrating that the manager is interested in the team member and their personal development;
3. Facilitating open and focused two-way communication;
4. Providing opportunities to improve capability and performance; and
5. Allows for best-practice sharing.

The following section provides a detailed look at the segments in the agenda or process.

Performance Review

- This is the first part of the meeting and provides for the opportunity of regular discussions and performance coaching opportunities during the year.
- What is reviewed is not only the actual results of the work, but perhaps more importantly focusing on the activities and capabilities that will lead to improved results.
- The performance review can use information from measurement systems, but more importantly will use the observations of behaviour and activities of the team member by the manager – it is critical that this review is based on the observable behaviours and actions of the team member and not on them as a person (or part of their personality).
- We also want to gain the opinion of the team member on how they think they have been going – so focus the discussion on the information needed, use open questions to expand the discussion and closed questions to gain specifics, encourage dialogue through eye contact and positive expressions and paraphrase your understanding of what you are hearing. It is critical that this is an open, two-way discussion focused on making the team member successful in their role.

- In addition to this, the agreed actions (in the Action Plan) from the previous period/s need to be reviewed – for effort, commitment, progress and completion.
- When recognising positive results, make sure you describe the results specifically and state why these results deserve your personal appreciation.
- Because the regular performance discussion is intended to focus on the development of skills over time, it is critical to ensure that this review step is about focusing on what was promised to be done or attempted – the development of some capabilities can take some time (perhaps months) and one of the things to check here is that the Team member is committed to continuing to attempt new behaviours and actions.

Feedback and Counselling

- This is the second segment of the regular performance discussion meeting.
- Feedback (in a coaching style) to be provided on: performance, commitment to the action plans, personal and professional development; as well as recognition, praise and reward for effort and results (it is just as important to reward effort as results, as the purpose is to motivate towards the progressive development of capabilities and results).
- Feedback needs to be provided with the view of recognising effort and results, and with the aim of encouraging open and honest two-way communication and performance, attitude and commitment.
- From this open and honest two-way communication the manager may identify opportunities for counselling that will help the team member.
- For constructive feedback, state the purpose of your feedback, describe specifically what you have observed, your reactions and allow them the opportunity to respond.

- People who have roles based in the field, or frontline sales and service roles often present with a range of issues (such as reluctance, resistance and stress) and these issues will manifest themselves in a range of behaviours – open communication should provide the manager with clues as to whether there are any issues and how to start to address these issues.
- Counselling is typically referred to as the way we address these issues. There are two ways to approach counselling:
 1. **Word-based procedures** - using words to explain, excite or exhort, creating self-help opportunities for the individual – this can use rational persuasion to change the way a person thinks and feels about an issue, or encouragement to excite the person 'give it another go', 'try again' and 'keep on going!';
 2. **Mechanical Procedures** - instructions and procedures that don't depend on words but adherence to activities to overcome the issues – these can be a promise to do something five times over the coming month – for example, if the team member is working on "Questioning Techniques", it could be the development of some example questions that are shared with the manager during the next week, fine-tuned, then used with a customer – the results of this process can be reviewed either between meetings or at the next meeting.

- Sometimes, feedback or counselling sessions can become **emotional**, if they do, this 4 Step process will be very useful.
 1. Calmly acknowledge the emotional behaviour;
 2. Describe the impact that the emotional behaviour is having on you and on the discussion you are having;
 3. Determine (together) if it is possible and feasible to continue the discussion constructively and propose an approach for jointly refocusing on the performance review meeting; and
 4. Express your support and reassurance for the person.

For example, we do not say, "*you make me angry...*" because this makes your feelings someone else's responsibility. We need to have responsibility for our own feelings. Instead we can say, "*I am feeling angry because...*"

Action Plan

- This is the third and final segment of the meeting and is the collection of ideas to work on.
- The actions are the mechanical procedures from the previous step and other specific things the Team member will do over the coming period.
- Caution should be used in not developing too many things for the Team member to work on over the coming period;
- The actions need to be focused on developing pragmatic capabilities, skills and activities that directly relate to the job and will lead to improved skills and performance results - these actions also need to be things that Team member is committed to working on.
- Gain agreement to new actions.

Monitor, Evaluate and Recognise

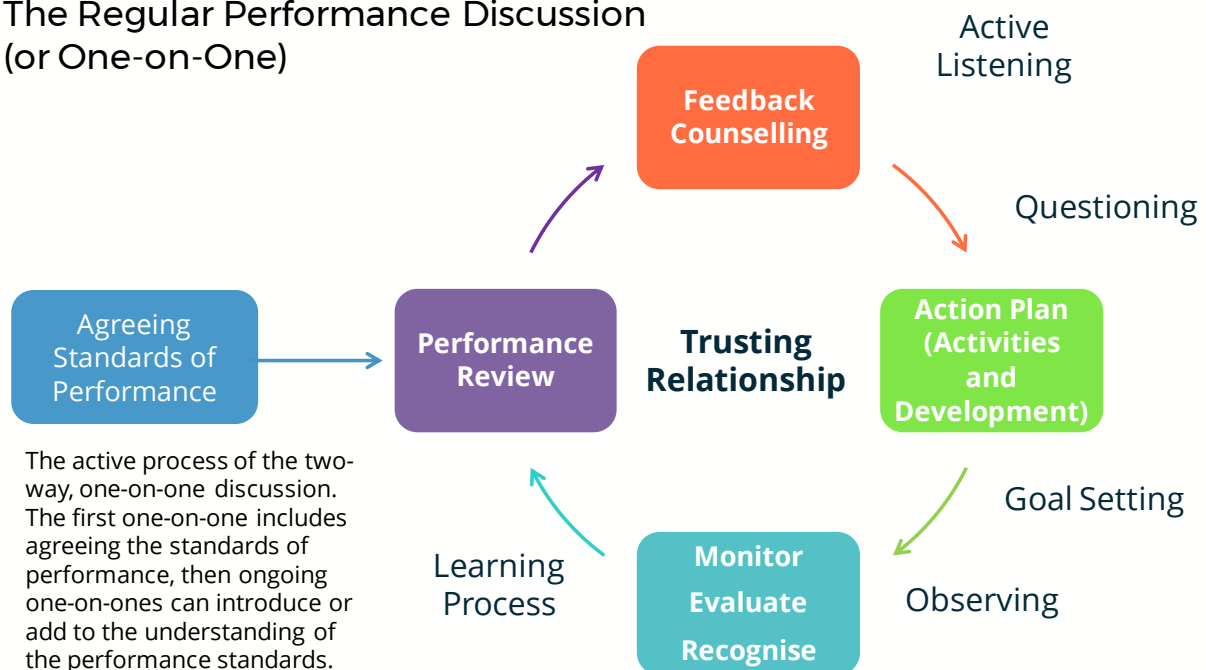
- Is included within each of the previous segments of the meeting and needs to be part your daily interactions with the team member.
- To close the meeting – summarise what has been discussed and agreed.
- If the team member is attempting to correct any behaviours, express your confidence that they can do this.
- Reaffirm any recognition and express your continuing support.

Personal Reflection:

The regular performance discussion - expanded

The diagram below is the 'regular performance discussion' meeting described earlier. This time the diagram adds some of the 'micro-skills' required to deliver the discussion effectively.

The Regular Performance Discussion (or One-on-One)



Active Listening

Is a communication technique that ensures the person listening is focused on what the speaker is saying (and not what the listener is thinking they will say next). Active listeners really comprehend what the speaker is saying - this goes beyond the words, and includes the body language and the emotional content. Active listening creates meaning from words, behaviour and emotion between the speaker and listener.

We all have barriers that prevent us from truly 'hearing' what someone else is saying. These barriers can be, (1) distractions that we have (things going on around us, or within our thoughts), (2) differences between our beliefs, values or perceptions and those of the speaker, and (3) misinterpretations of what the other person is saying. To overcome

distractions it is about retaining eye contact and remaining engaged with the speaker, to overcome the other two barriers, paraphrasing can be useful.

[*Paraphrase* – the concise response to the speaker that states the essence of what the speaker said (content) in the listener's own words. The paraphrase should really pick on the essentials of what the person said, and in this way the paraphrase can be a way of checking understanding and at the same time clearly stating the message from the speaker. The paraphrase can also join the feelings and facts from the speaker so that there is a reflection of meaning.]

Questioning

Essentially, there are two core types of questions we can use in the regular performance discussion, open and closed questions. Sure they can be used for clarifying our understanding, but essentially there are two core types.

A closed question is one that can be answered with a short phrase or a single word (often, 'yes' or 'no').

These closed questions are good for really being clear and specific about what we want from the other person. Therefore, use closed questions to get the facts. And because closed questions are easy and quick to answer, it is often seen that closed questions are used to control the conversation - such as the classic courtroom drama would have, *"objection - counsel is leading the witness..."*

Open questions (generally) cannot be answered with a 'yes' or 'no' and are likely to have longer answers.

We use open questions to seek out information about how the other person is feeling, what they think, their opinions and what they know. Open questions are likely to make the other person, think and reflect on what we have asked them. Beginning with words like, *how, what, why* and *describe*, open questions share control of the conversation and allow us to have more engagement in the discussion.

[Five Whys – is a technique used for getting to the root cause of a problem. It can help us deal with the actual problem rather than a symptom. The idea is that you ask a series of why questions to discover the root cause. For example:

Q1: "why didn't we include due dates for compliance on the Record of Assessment?" A: "I did not have time to put them in",

Q2: "what was happening that meant you ran out of time", A: "the licensee interrupted me about another matter and I had to respond to their comments",

Q3: "was the other matter important to the RoA?", A: "No it turned out to be unrelated but seemed important at the time";

Q4: "How much time did you spend talking about this other matter?", A: "just a few minutes",

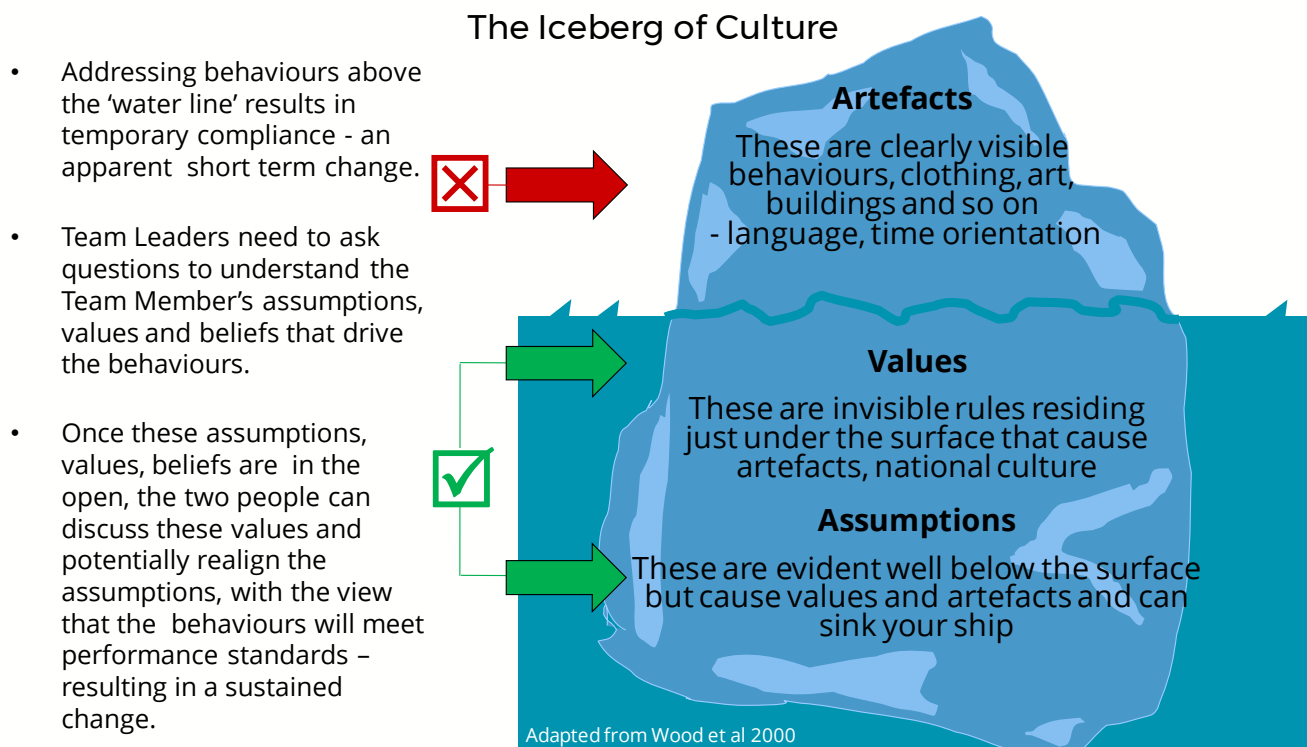
Q5: "so why didn't you return to completing the RoA?", A: "well, i guess I forgot to check it before I left it with them..."

(in this crude example, the root cause for not completing the Due Dates was that the Officer did not manage the interaction with the licensee effectively). Therefore, the next step for the manager is to coach the team member on double checking the RoA before handing it over to ensure that our quality service standards are achieved.]

Being ask assertive - rather than tell assertive - encourages others to self assess and evaluate what their position is...it opens a window for greater self awareness.

Questioning is also used to understand the values, attitudes and beliefs of the team member (next page).

The Iceberg of Culture diagram below shows us that the artefacts - or a person's behaviour above the surface - is a result of their values, beliefs and assumptions - the things that sit below the surface. So we can "see" the artefacts of a person's behaviour, what the person does, how they act etc, however focusing at this level only lets us observe the "what" of their behaviour, not the "why" that is based on their beliefs, values and assumptions.



Questioning can be used to understand the core sets of beliefs and values that affect a person's behaviour. By understanding these values and beliefs, we have the potential to reframe the person's understanding so that this will result in a change of behaviour.

Goal Setting

There is a classic model for meaningful goals - SMART. Specific, Measurable, Achievable, Realistic and Time-bound. There are two keys here for Team Leaders:

- Measureable also means observable - if you can observe it in the real world, then it is measureable. In this way behaviour and attitude is measurable.
- Achievable - we are better off having small incremental improvements in skills and behaviour, rather than attempting huge leaps (recall goal setting motivational theory).

Observing Behaviours

Observation is one of the key skills effective team leaders have. Anything that is observable is measureable. This means that if we can - see it, feel it, hear it, smell it, touch it - then changes in it can be observed. Once we have agreed the standards of performance, we can observe the amount of effort the person is putting into trying to achieve their goals. Additionally, once we have defined an action plan for activities for development, we can observe the level of effort and attempt at doing the activities. This observing means being alert and aware to the things going on around us in and around the work environment. The information based on the observations will enable us to have more meaningful conversations, day-by-day and during the regular performance discussion.

Team leaders often make the mistake that it is only the data from the reports that can be discussed with the team member about performance. Most of our work and achievement is behavioural. The net sum of our results are the outcome of our behaviour and activities we have put in place. Observing behaviours in the work place will provide extraordinary opportunities to lead, develop and coach our team members.

Learning Process

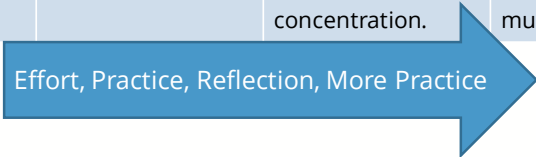
Understanding how an team member learns best is an important part of helping them achieve their best. Some people can learn from reading and then apply the skill. Others need to watch others, or do it themselves. Either way, our role is to work with them to develop skills and behaviours that will allow them to achieve their goals.

Developing a new skill or competence will mean that we will go through the four stages of competence (below). Once we are aware of the new skill, we then need to consciously practice the skill so that we can get it right while we are concentrating on it. The stage after this is doing the skill without consciously thinking of it.

A great example of this is driving the car. Drivers with many years experience will often arrive somewhere without consciously thinking about changing the gears or steering. However, when they first started driving, that had to concentrate of each movement and coordination of movements.

Four Stages of Competence

1. Unconscious Incompetence	2. Conscious Incompetence	3. Conscious Competence	4. Unconscious Competence
We neither understand or know how to do something, nor do we recognise the deficit or have any idea how to.	We do not understand or know how to do something, we recognise the deficit, without yet addressing it.	We know how to do something but, demonstrating the skill or knowledge requires a great deal of conscious effort and concentration.	We have had so much practice that the skill becomes "second nature" and can be performed without concentrating too much.

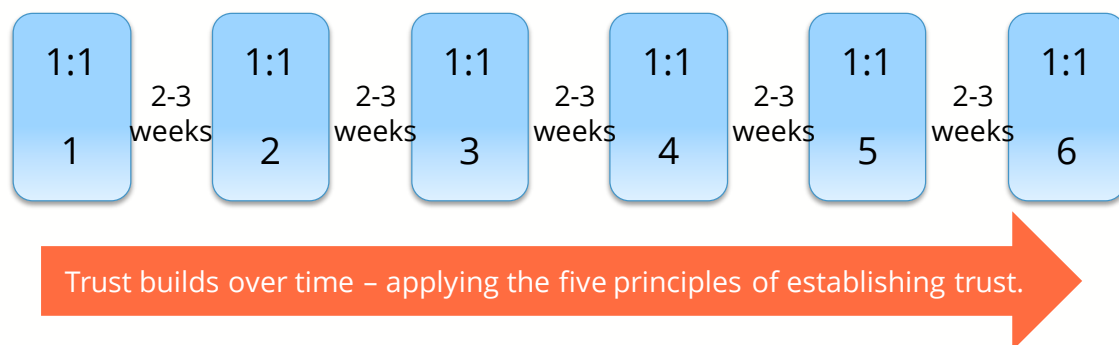


Effort, Practice, Reflection, More Practice

As team leaders our role is to encourage the team member through the effort, practice, reflection and more practice process to develop the new skill, and it can often take up to three months to embed a new behaviour or skill.

Planning Regular Performance Discussions Over Time

Team Leaders need to recognise that the Regular Performance Discussion (also known as a one-on-one or 1:1), occur over time, each building on the previous 1:1 and other context within the team. Therefore Team Leaders in some cases need to carefully plan out the 1:1's over time.



Take a longer term approach to planning 1:1's. Consider the series of conversations required over time to achieve improved trust and performance. If possible, deal with the smaller or easier performance standards early. As trust builds you can address more standards of performance that may have been considered 'sensitive' earlier on. Additionally, gain agreements in small steps - you can view the series of 1:1's as a progressive set of small agreements that leads to being able to talk about gaining agreements that may be considered 'larger'.

Recognise small changes and improvements. Make sure we clearly understand the issue (and impacts of the behaviours) before trying to address (no assumptions). If possible, deal with the smaller or easier performance standards early. Use real stories and examples – try to add in the "see and feel" to support the change you are looking for. As trust builds you can address more standards of performance that may have been considered 'sensitive' earlier, in a shorter time frame.

Handovers - the 2:1

Handovers occur when a Team Member moves from one Team Leader to another. The Two Team Leader get together with Team Member as a transition from one Team Leader to another for the One-on-ones (Regular Performance Discussions).

First Team Leader (the one handing over):	<ul style="list-style-type: none"> • Prepares with the Team Member for the meeting • Any past issues that need to be out in the open..? • Provides an overview of the development opportunities discussed – that is the things the Team Leader and Team Member have worked on together • Describes what is the focus for the Team Member now
Second Team Leader	<ul style="list-style-type: none"> • Commits to open two way communication, to the support of the Team Member, and reaffirms the importance of the ongoing One-on-ones
What's in for the discussion	<ul style="list-style-type: none"> • Work in progress • Achievements • Strengths in performance (experience, knowledge, skills) • Opportunities for improvement • Leave and training planned • Others items agreed with the TL and TM prior to the 2:1 handover
<ul style="list-style-type: none"> • What's out for the discussion 	<ul style="list-style-type: none"> • Historical issues that are resolved • Items not agreed with the TM prior to the meting

How to agree and set standards of performance

Providing a clear understanding of what is expected from team members is a core management function. This process links the needs of the individual and the *triad of the emotion contract*, agreeing and defining the standards of performance is a key principle in establishing a relationship with the team member that is based on trust. Additionally, agreeing and setting standards of performance allows team members to do their best for themselves, their team and the organisation. It also corresponds to the ERG theory of motivation, in that we set a clear understanding of what is expected to 'survive' within the organisation. That is, the team member understands what is expected so that existence can be prolonged.

Agreeing and setting standards of performance establishes the principle of reasonable management direction (within the context of your organisation). Standards of performance will include behaviours, team work, functional job task performance, results and outcomes from the job, agreed measures and targets.

The following process contains the key steps in setting up and conducting a discussion with the team member. These steps are listed below.

1. Describe the role in terms of the results achieved from the activity and outputs, establish the connection to the organisation's outcomes.
2. Agree the performance criteria and a method of measuring the criteria.
3. Mutually identify the skills, resources and behaviours needed to deliver the agreed performance criteria.
4. Identify any impediments to delivering the performance required.
5. Establish priorities.
6. Review and check that the team member has the understanding and commitment.
7. Make an appointment to provide an opportunity to review progress.

Personal Reflection:

How do I connect the standard of performance with our day to day work..?

How do I set and measure the standards of performance..?

Recognising Achievements

Effective team leaders as coaches understand how to recognise positive results, achievements and effort, in a way that motivates an team member - that is that it is not just a quick '*slap on the back*'.

There are motivational benefits in positive reinforcement along with understanding the various requirements from team members for descriptive recognition (ERG and the 'triad of the emotional contract'). This includes an appreciation of the locus of control and level of influence an team member can have on achievements and others around them.

- The process below describes a method for recognising achievements.
 1. Identify an opportunity to recognise achievements;
 2. Determine how to recognise the individual team member;
 3. Plan what to say, plan to make it real;
 - *Real* means - to actually *feel* it, to be *sincere* and *genuine*
 4. Describe the results, achievement and/or effort to be recognised – be specific;
 5. Be clear why these results, achievement and/or effort deserve your appreciation;
 6. Close by reaffirming the recognition and your ongoing support for the team member.

[Descriptive recognition – is a clear description of the person's behaviour (or results of the behaviour). What is it exactly that they have done that deserves recognition? Often this will be based on their capabilities and skills, rather than the personality or character. Descriptive recognition will help the other person understand the capabilities that were used and encourage a conscious development of the skills.]

Tips:

- Describe the results and achievements specifically
- Say why these results or achievements deserve your personal recognition
- Close by re-affirming your recognition and continuing support

Examples:

Vague	Specific/Descriptive
Jane, you are becoming a whiz	Jane, this is the second month you have delivered on your entire program of calls
John, I know I can rely on you	John, you consistently deliver the quality needed
Bill, you guys really came through this time	Bill, your team were really focused for the last two weeks and have met the increased demand

Personal Reflection:

How can I use descriptive recognition to improve trust and motivation..?

Think about a recent work situation that afforded you the opportunity for recognising the achievement/s of one of your team. What did you do? What did you say?

How could you do that differently using the above method of recognising achievements?

How would you script your discussion if you had the chance again?

Taking corrective action

Having set and agreed the standards of performance, monitoring takes place. However, in some cases team members will not make the effort required to perform at the agreed standard and/or they can engage in behaviour that interferes with the performance of other members of the team or teams.

This steps in the process below focus on setting up and conducting a discussion with the team member.

- | | |
|----------------|--|
| The Problem | <ol style="list-style-type: none"> 1. Clearly identify the difference between the current level of performance and the agreed standards of performance. 2. Describe the negative impacts that this level of performance is having. 3. Ask for the team member's assessment of the situation. |
| The Solution | <ol style="list-style-type: none"> 4. Ask for ideas on how the team member can take action to correct the situation. 5. The manager also adds ideas for corrective action. 6. Collate the list of ideas and work together to agree to a plan of action. 7. Manager explains the steps they plan to take and why. |
| Moving Forward | <ol style="list-style-type: none"> 8. Gain agreement from the team member on the action plan (with dates and qualified actions) 9. Manager expresses confidence in the team member to achieve the action plan and pledges support. 10. Agree a follow up date. |

Personal Reflection:

When did I last take corrective action..?

Based on what I know now, how could I have done this better..?

Coaching

As mentioned in the Introduction, coaching is really an attitude or approach to developing the people you are responsible for. Coaches use the problems and challenges that come up on the job as opportunities to build skills, behaviours and motivation within their team. A manager with the attitude of a coach, doesn't just solve work problems, they use these as opportunities to develop strengths and competencies in their people.

The process of the 'regular performance discussion' is a management tool that we can use to set an agenda for a meaningful conversation and discussion about performance. Coaching is how we do it. We approach the 'regular performance discussion' with the view of 'managing the process', however our attitude toward the team member is that of a coach. At least in the first phase, our attitude always has to be about developing the skills and a capability of the individual to achieve the work goals we have agreed. If however, the individual does not make the effort, or have the will, or essential skill to succeed, then the Team Leader's role will change to managing a process (guided by your organisational HR/IR policy and practice) for managing unsatisfactory performance. In our efforts as a manager or team leader, most of our role with our people, will be that of the coach.

This differentiation about the role of coach and team leader is important to ensure our mindset is guided toward development. The role of the coach aligns with the principles of coaching for performance in section one of this booklet. Building working relationships built on trust and living the five principles from page 5.

Additionally, to maintain the trust in the relationship, Coaching must be a “safe zone”. When an opportunity for coaching is discovered or uncovered, then you step into a “safe zone” that is, not formal performance management. So long as the team member maintains their effort to improve by completing their homework, actively trying, and making progress, then skills that are being coached are agreed by both parties to be at a “developing” level of achievement but that doesn't make the team member an easy target for then being told they are not ‘competent’ in their role.

Further points about the role of the coach are below, followed by the traits of a good coach.

- Coaching does not just take place during the regular performance discussion, but most of the time when interacting with team members.
- Coaches get team members to examine their own performance and guide them to develop plans to improve.
- Coaches make use of 'informal moments' to encourage, recognise and collaborate with team members in developing their skills and behaviours.
- Coaches integrate the needs of organisation and the team with the development needs of their teams.
- Coaches know that people are willing to do things they believe to be worthwhile, more than the things they are 'told' to do.
- Coaches are focused on incremental improvements, encouraging their people to be the best they can be.
- Coaches clearly describe the performance area for development and why it is important, then seek the team member's opinion, as this will achieve (at least) three things :

(1) self reflection on how I am going, (2) provides the coach with information about the team members perspective, and (3) helps to build trust in the relationship as the coach is demonstrating interest in the team member's opinions. Then the coach asks the team member to identify ways that could improve performance and provide feedback, adding their own ideas.

- Coaches then focus the team member's attention on the 'bite-size' chunks that will lead to the improvements.
- Coaches express confidence in their people and support for the effort required.

Personal Reflection:

Have I known a good coach..? What points above did that person display..?

When have I displayed the principles of coaching...?

Am I doing this now in my team..?

Traits of a good coach

A good coach is...	How...
Positive minded	<p>We are not about correcting mistakes, of finding fault in process, systems or behaviours; the role of the coach is to help others achieve more.</p> <p>Rather than providing answers and solutions, the most powerful tool is the question:</p> <p>"I hear that you have tried this a few times with this customer, what is it that you need to do differently to get a different result?"</p> <p>"If this approach to delivering your actions is not working for you, what other things can you try out".</p> <p>That is, not giving the answer, but providing them with the challenge to develop the ideas themselves. When we hear a mistake has been made, or something has not worked, the question can drive reflection and learning, "okay, so what can we learn from this", "now that we know this, what would we do differently next time", "how can we apply this learning..?"</p>
Enthusiastic	<p>This enthusiasm is about setting the tone of a meeting or discussion; we can share success stories, build the ground swell that the processes are working, "let's figure out how we make it work for us..!"</p>
Supportive	<p>Supporting is about encouragement, and also about ensuring the team gets the help they need to succeed. We can offer a different perspective, consider what other resources we aware of that can help, further ideas or insight that we might be able to use...</p>
Trusting	<p>We need to demonstrate that we believe they are honest and conscientious towards their member and work. We should not appear to be checking up on them or appear like a 'policeman/auditor'.</p>
Focused	<p>Our communication needs to be specific and focused on the agenda and behaviours we have seen. We must resist the temptation to allow the discussion to get off-topic.</p>

A good coach is...	How...
Goal-oriented	Similar to above, we can keep the focus up by being goal-oriented, setting tasks and objectives that will produce incremental results for the individual and team.
Respectful	Similar to the principle of 'maintaining the self-confidence and self-esteem of others', respect for others comes through in what we say, how we say it, our body language and ensuring that we have first sought to understand someone's perspective before challenging or questioning.
Knowledgeable	We still need to know what we are talking about, part of the qualification of being a coach is that we know something about the business, the process and what we are trying to achieve – but if we are not sure, or it's a new area for us, don't bluff – ask questions, clarify and confirm your understanding.
Observant	We need to be aware of what is happening in the discussions and meetings. We need to observe and try and understand, any group dynamics, the body language, tone of voice, choice of words, reactions, the things not discussed, the feeling of the individual or teams.
Patient	Not only in terms of picking the right moment or words to deliver your chosen question/s or share your idea, but also in listening to see if someone has got your question, idea or suggestion. It may take a couple of goes at restating the question, rephrasing the question or suggestion before the penny drops and you are understood. Be patient.
Clear	Communication is not what we intended to say, but the message that is received. So to be clear is to check for understanding (directly ask, or by hearing what they say next), and ensure the message received is the one we intended.

3. Bibliography and (suggested) further reading

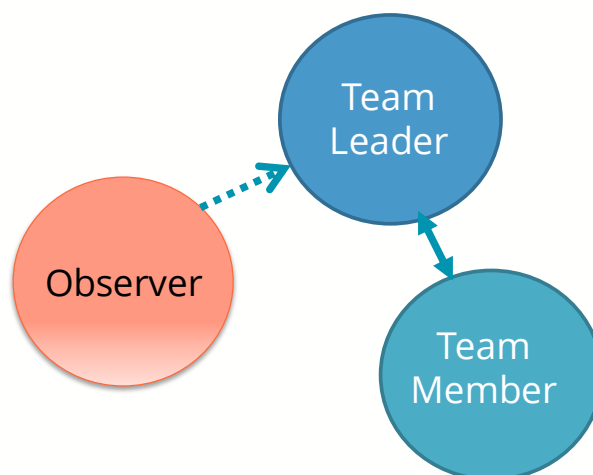
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4. Planning Templates and Observer Sheets

The previous sections of this booklet describe the principles and the toolkit for coaching for performance. Page 25 describes the four stages of competence, with the key to developing competence being, practice. To develop competence we use skills practice session where groups of three will take rotating roles; the Team Leader, a Team Member and an Observer (the person in the role of Observer changes each time). This is not a role play, each person is a Team Leader and a Team Member, this is about practicing these new techniques. The role of the Observer is to 'observe' and provide feedback, to support the benefit from this, Observer Sheets are used.

The skills practice has three steps:

1. Planning for the discussion (for the Team Leader)
2. Practicing the discussion/techniques (for all three)
3. Debriefing the discussion (for all three) with the Observer providing feedback on what they saw, feel and heard, and all discussing on what went well and what needs improvement.



The Observer is focused on the Team Leader - behaviours, actions and how well they are using the new techniques and processes. The group agrees on the behaviours of the Team Member prior to the Skills Practice (for example, will they get emotional, cooperative or disagreeable).

The attached planning and observer sheets are to be used during the skills practice sessions.

Planning for - *How to agree and set standards of performance* - discussion.

Answer the following questions as a way to prepare for the discussion with the team member.

What are the standards of performance or results I am looking for...? How will these standards be measured or observed...?

How do these standards or results impact our Group...? What are the flow on effects for Council or the Community...?

What skills, resources, guidance or knowledge might the team member need...? What do I have available to me...?

How can I make sure the team member has understood and agrees with the standards or the results...?

Answer the following questions as a way to prepare for the discussion with the team member.

Answer the following questions as a way to prepare for the discussion with the team member.

[illegible]

Planning for - How to hold a regular performance discussion.

Answer the following questions as a way to prepare for the discussion with the team member.

Performance Review:

What will be reviewed...? What was discussed last time, actions, what observations and other information do I have..?

Feedback and counselling:

How can I coach the team member to achieve the standards of performance we have agreed...?
How does the team member learn...?

Action planning:

What are the actions from the last meeting..? What might the team member need (skills, resources, experience or guidelines) to succeed..?

Answer the following questions as a way to prepare for the discussion with the team member.

[illegible]

Planning for - Recognising achievements discussion.

Answer the following questions as a way to prepare for the discussion with the team member.

What specific actions, results, achievements or effort have you recently observed...?
(Who, what, where when, how much...)

Why are these actions, results, achievements or efforts important to recognise...?

What are the descriptive recognition statements I could use ...?

Answer the following questions as a way to prepare for the discussion with the team member.

[illegible]

Planning for a - *Recognising achievements* - discussion.

Answer the following questions as a way to prepare for the discussion with the team member.

What specific actions, results, achievements or effort have you recently observed...?
(Who, what, where when, how much...)

Why are these actions, results, achievements or efforts important to recognise...?

What are the descriptive recognition statements I could use ...?

Answer the following questions as a way to prepare for the discussion with the team member.

[illegible]

Planning for - Taking Corrective Action - discussion.

Answer the following questions as a way to prepare for the discussion with the team member.

What is the difference between the current level of performance and the agreed standard of performance...? Be specific - behaviour, actions, or results
What is the negative impact of the team member's current level of performance...? Do the - performance, behaviour, actions, or results - really warrant corrective action..?
What ideas do I have that might be useful to help correct the situation...?
Are there factors outside of the team member's control that may be contributing to the performance...?

Answer the following questions as a way to prepare for the discussion with the team member.

[illegible]

Observer Sheet - How to agree and set standards of performance.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Key Step in the process	Specific behaviours and phrases	Strengths	Suggestions
1. Describe the role in terms of the results achieved from the activity and outputs, establish the connection to the organisations outcomes			
2. Agree the performance criteria and a method of measuring the criteria.			
3. Mutually identify the skills, resources and behaviours needed to deliver the agreed performance criteria.			
4. Identify any impediments to delivering the performance required.			
5. Establish priorities.			
6. Review and check that the team member has the understanding and commitment.			
7. Make an appointment to provide an opportunity to review progress			

Observer Sheet - How to agree and set standards of performance.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Principles for establishing trust	Specific behaviours and phrases	Strengths	Suggestions
1. Focus on the situation, issue or behaviour, not on the person;			
2. Maintain the self-confidence and self-esteem of others;			
3. Maintain constructive relationships;			
4. Take the initiative to make things better; and			
5. Lead by example			

Observer Sheet - How to hold a regular performance discussion.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Key Step in the process	Specific behaviours and phrases	Strengths	Suggestions
1. Performance Review <ul style="list-style-type: none">• Shared context• Understanding of performance• How is the team member going• Review previous actions• Evaluate and recognise effort/results• Active listening• Appropriate questioning• Observing behaviours			
2. Feedback and Counselling. <ul style="list-style-type: none">• Feedback in a coaching style• Constructive feedback• Addressing 'issues' effectively• Handling emotional behaviour• Active listening• Appropriate questioning			
3. Action Plan <ul style="list-style-type: none">• Clear agreement of what should be done next• Clear actions• Learning process recognised• Discussion summary and close			

Observer Sheet - How to hold a regular performance discussion.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Principles for establishing trust	Specific behaviours and phrases	Strengths	Suggestions
1. Focus on the situation, issue or behaviour, not on the person;			
2. Maintain the self-confidence and self-esteem of others;			
3. Maintain constructive relationships;			
4. Take the initiative to make things better; and			
5. Lead by example			

Observer Sheet - How to Recognise Achievements.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Key Step in the process	Specific behaviours and phrases	Strengths	Suggestions
<ul style="list-style-type: none">Specific description of the actions, achievements or effort results			
<ul style="list-style-type: none">Clear statement why these actions, achievement, effort or results deserve the personal recognition.			
<ul style="list-style-type: none">Close - reaffirmed recognition and provided the team member with a statement of continuing support.			

Observer Sheet - How to Recognise Achievements.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Principles for establishing trust	Specific behaviours and phrases	Strengths	Suggestions
1. Focus on the situation, issue or behaviour, not on the person;			
2. Maintain the self-confidence and self-esteem of others;			
3. Maintain constructive relationships;			
4. Take the initiative to make things better; and			
5. Lead by example			

Observer Sheet - Taking Corrective Action.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Key Step in the process	Specific behaviours and phrases	Strengths	Suggestions
1. Clearly identify the difference between the current level of performance and the agreed standards of performance.			
2. Describe the negative impacts that this level of performance is having.			
3. Ask for the team member's assessment of the situation.			
4. Ask for ideas on how the team member can take action to correct the situation.			
5. The manager also adds ideas for corrective action.			
6. Collate the list of ideas and work together to agree to an action plan.			
7. Manager explains the steps they plan to take and why.			
8. Gain agreement from the team member on the action plan (with dates and qualified actions)			
9. Manager expresses confidence in the team member to achieve the action plan and pledges support.			
10. Agree a follow up date.			

Observer Sheet - Taking Corrective Action.

Use these sheets to make careful notes of the specific things said and done well during the skills practice , and suggestions for improvement.

Principles for establishing trust	Specific behaviours and phrases	Strengths	Suggestions
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2. Maintain the self-confidence and self-esteem of others;			
3. Maintain constructive relationships;			
4. Take the initiative to make things better; and			
5. Lead by example			



Coaching for Performance

Program Details

About this capability development program

Coaching for Performance can be delivered as a keynote, as one-day program. Optimal results come from running this as a series of In-house workshops, where the content and application is specific to your organisation and context, and you team leaders learn skills, then practice them on the job, and come back in for reflection and new skills.

This program is designed to go beyond training to actually deliver capability to the organisation and the people that make up these organisations. This program is in a niche (we are not an RTO providing generalist training or purely content based, academic material,); this capability program is rigorous, theory-backed 'how-to implement' delivered by someone with years of experience in management and as a consultant, sharing their knowledge and experience on a 'pragmatic, how to' approach.

The need for 'Coaching for Performance'

Having delivered two other programs - Performance Improvement and the Performance Measurement Blueprint Workshop (PuMP) - we found that many managers would ask, "this is great - but how do we manage the performance of our people on a regular basis..?" This question is essentially about the 'soft skills' managers, supervisors and team leaders need to engage their teams and manage their performance. Coaching for Performance is all about developing that capability, the 'soft skills' that are often the hardest to deliver.

This quote from the workbook provides context about our approach.

This booklet is not called managing for performance, but coaching for performance. Managing could be described as the processes we put in place to manage the work tasks and activities. Coaching however, is an attitude or approach to developing the people for whom you are responsible. As coaches, effective managers of people use the problems and challenges that come up on the job as opportunities to build skills, behaviours and motivation for each individual within their team. A manager with the attitude of a coach, doesn't just solve work problems, they use these opportunities to develop strengths and competencies in their people.

Excerpt from the "Coaching for Performance Workbook"
(Introduction, page 3)

Managers, supervisors and team leaders come away from the Coaching for Performance program with practised skills and a toolkit to coach their people for improved performance outcomes, and manage performance when required.



The delivery format of 'Coaching for Performance'

Option One:

As a one day workshop. Starts with an overview of the key principles behind Coaching for Performance. Then a look into the whole method each of the key skills and process within the system. Then, skills practice on using each technique. Working in groups of three, following time for planning, each person takes a turn in each role of (1) Team Leader, (2) Team Member, and (3) Observer. Read on for more information about the content that can be condensed into one day.

Option Two:

Coaching for performance is about building capability over time, and as such these new skills and techniques are best learned when practiced and applied in the workplace. The program is delivered in the following method.

- ✓ 5 half day workshops with (individual) one-on-one coaching, spread across a ten week period
- ✓ Workshop 1, then after one week:
- ✓ Workshop 2, then after two weeks:
- ✓ Workshop 3, then after two weeks:
- ✓ Workshop 4.
- ✓ Over the following two weeks, one 90 minute one-on-one coaching session with the facilitator.
- ✓ Workshop 5 (final workshop held at around week nine or 10)

Option Three:

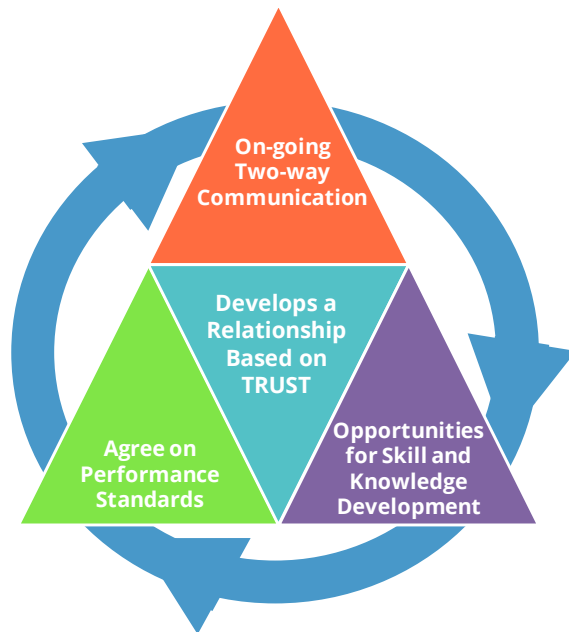
An approach that is tailored for you and your team.

Any questions, or to
book your workshop, contact Mark:

Coaching for Performance program participants:

- ✓ Receive the 40+ (A4) page workbook, that fully details the processes and techniques described in the workshops, a complete set of the planning and practice templates.
- ✓ Learn the techniques of agreeing performance standards, how to hold regular performance discussions, how to take corrective action and give praise. Within these techniques participants also develop skills in, handling emotional behaviour, questioning, work-performance-based counselling, setting goals, monitoring performance and providing feedback.
- ✓ Participate in skills practice exercises in groups of three during the workshop/s to practice the skills with their colleagues (note: these are not role plays, or acting of any type - the people attending the program practice the skill).
- ✓ Use these new skills and techniques immediately in the workplace, then in subsequent workshops, (Delivery Option 2 or 3) share their experiences and learning's with others. Then further refine their new skills, within the workshop and on the job; and
- ✓ Receive coaching from the facilitator, (and for Delivery Option 2 or 3 not only formally during the gap between Workshops 4 and 5, but continually, as required one-on-one coaching across the 10 weeks).

The Triad of the Emotional Contract

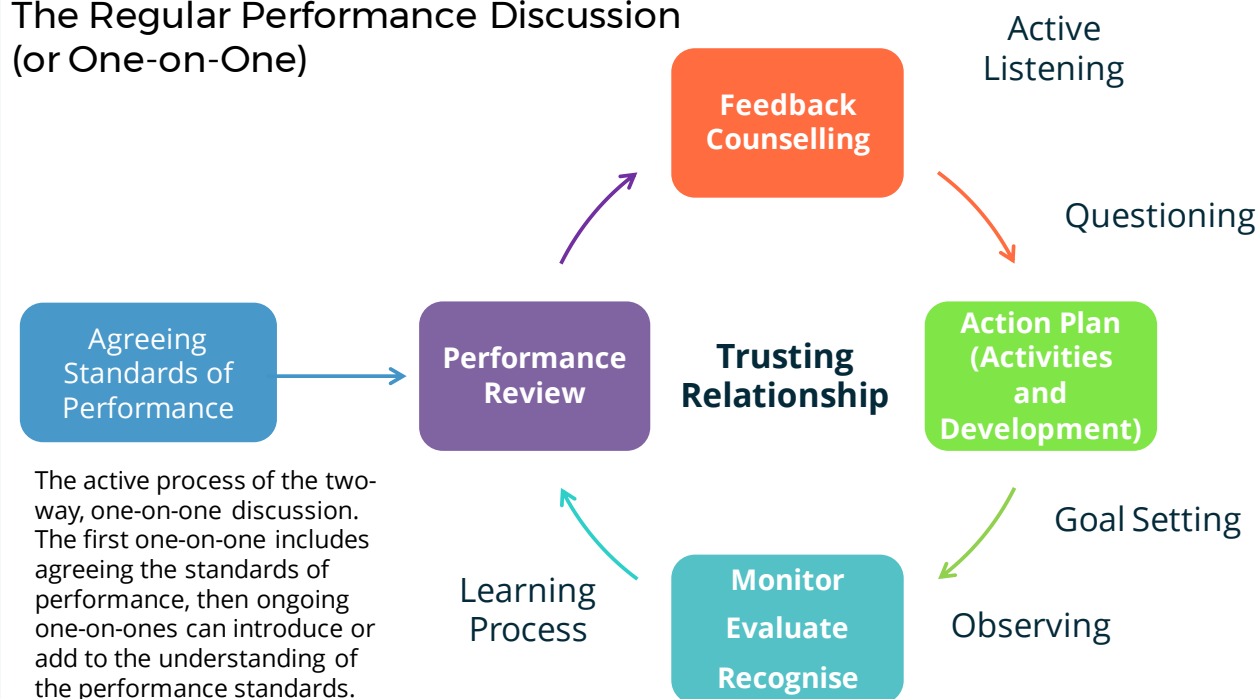


One of the key principles behind the Coaching for Performance Program is the Triad of the Emotional Contract. The quality of the relationship between the team leader and the team member is based on the level of trust between the two people. Trust is built (or not) through the series of conversations they have across time.

Core Skills Developed:

- ✓ How to agree and set standards of performance
- ✓ How to hold a regular performance discussion
- ✓ How to take corrective action
- ✓ Active Listening
- ✓ Questioning skills
- ✓ How to recognise achievements
- ✓ Dealing with emotion behaviour
- ✓ Planning One-on-ones across time
- ✓ Goal setting

The Regular Performance Discussion (or One-on-One)



About Mark Hocknell

For the last 12 years (as a consultant) Mark has developed customer strategies with more than 35 organisations (from small businesses to large GOC's) to improve business results and the delivery of customer value. Prior to this, Mark was with Suncorp for 14 years where he held senior customer management roles, during his last three years there he led the implementation of the technology, tools and change to support the 'Allfinanz strategy' which placed Suncorp with the highest cross-selling rate of any Australian financial institution.



From 2003 to 2011 he was a sessional academic (part-time) with Brisbane Graduate School of Business (QUT) where he developed and delivered two electives within the MBA program, Sales Management and Customer Relationship Management (CRM). In 2015 he was appointed as an Adjunct Lecturer to the Griffith University School of Business, where he has developed the Personal Selling and Sales Management course (2038MKT) for the Department of Marketing.

Mark has a MBA, holds qualifications in change management, and certifications in Net Promoter Score and PuMP®(performance measurement).

Your return on investment: (pricing on application)

Your team:

- ✓ With a clear and consistent view of what it means to “manage performance” and a recognition that the key role of the team leader is to coach (80/20)
- ✓ Practised skills
- ✓ Confidence in delivering each of the core skills

Your next step:

To develop the capability of your team, chat with Mark for more details:
call 0438 451 405, or email: mark@markhocknell.com

Some T's and C's

Pricing will include GST, quotes will be provided on request

Mark is based in South-east Queensland. If any shipping for workshop materials, or travel and accommodation is needed, these actual costs will be invoiced.

Mark carries Professional Indemnity insurance to the value of \$5,000,000 and Public Liability insurance to the value of \$10,000,000.

Training in, and using the Triad of the Emotional Contract and the associated techniques is for internal facilitation and personal use of delegates only. Any other use of this methodology, such as teaching groups or selling to clients, requires permission from Mark Hocknell.