



SMARTER THAN THE AVERAGE GUIDE

HBR Guide + Tools for

Coaching Employees

Coach's Manual

Introduction

Welcome to the ***HBR Guide + Tools for Coaching Employees!*** Our worksheets, checklists, and takeaway aids are designed to give you practical guidance as you become an effective coach to your employees. **We suggest you save this manual to your desktop or print it out for easy reference.**

Our tools will take you through each phase of the process: the tools in Section 1 organize the work that you and your employee should do before your first coaching meeting to prepare for a directed, clear conversation. Section 2 tools should be used in the meeting itself. And the tools in Section 3 advise how to keep your momentum going after the first such session.

Some of these tools can be used as stand-alone references; others offer scripts for conversation; and some are worksheets where you and your employee can record ideas, reflections, and action plans. We generally recommend you use the tools in the order they're provided, but you should edit, expand, or skip according to your needs.

As you explore these materials, remember that your coaching conversations are likely to broach some sensitive subjects: an employee's personal and professional insecurities, what she keeps trying to do but can't get right, and so forth. The best way to build trust around such topics is to invest in a positive, responsive working relationship across the board. In the moment, though, you can emphasize that your mission in these sessions is to help and support your employee. And show her you mean it by respecting the conversational boundaries she sets by word or gesture.

CONTENTS

INTRODUCTION

SECTION 1 Prepare for the First Coaching Session

Preparing for the First Meeting
Employee Questionnaire

SECTION 2 Conduct a Coaching Session

Employee Questionnaire
(for the Coach)
Coaching Plan
Follow-Up Meeting Agenda
Asking the Right Questions
Case Study: Asking Open-
Ended Questions
Getting in the Coach's Mind-Set

SECTION 3 Keep Coaching After the First Session

Preparing for Follow-Up
Meetings
Following Up

Section 1

Prepare for the First Coaching Session

PURPOSE

For you and your employee to establish the goals each of you has for the coaching relationship and to discover a communication style that works for you both.

WHEN YOU SHOULD USE THESE TOOLS

When you're preparing for your first coaching meeting.

WHEN YOU'LL KNOW YOU'RE DONE

You're done when you both have completed your preparation forms and when you, as the coach, have a clear idea of what you want your employee to get out of the sessions *and why*. If you don't have a close existing relationship with your employee, she'll appreciate some time to figure out how she wants to communicate with you about her goals. If you do know her well, you'll want to step back from your daily dynamic and think critically about how it should change in the context of coaching. Don't leave this work until the last minute, because you won't want to rush.

Preparing for the First Meeting

As a manager, it's your job to help your employee link her professional growth with your organization's needs and opportunities. While she's evaluating her own strengths and weaknesses (using the **Employee Questionnaire**), this tool will prepare you to frame those issues in a larger organizational context.

Although it's important to articulate your hopes for the coaching relationship, it's ultimately up to your employee to set her own goals. This exercise should get you thinking more flexibly about possible courses of development for her—without becoming fixated on a single solution.

TOOLS

[Preparing for the First Meeting](#)
[Employee Questionnaire](#)

READ MORE

HBR Guide to Coaching Employees

Chapter 1

Shift Your Thinking to Coach Effectively

Chapter 2

Set the Stage to Stimulate Growth

Chapter 3

Earn Your Employees' Trust

Employee Questionnaire

Give your employee plenty of time to complete this version of the worksheet ahead of your first meeting. If there are particular topics that you want her to focus on, let her know. To ensure that her answers are unbiased, avoid giving too-specific instructions. The purpose of this exercise is to help *her* communicate to *you* what she already knows.

In your first meeting, you will ask her these questions (using the coach's version of the **Employee Questionnaire**) as part of your initial interview. (The tools are essentially the same, but the coach's version has additional instructions for you.)

This prep work requires a considerable investment of energy from an employee, so be prepared to spend some time really listening to her answers during your first coaching session. You'll show her that you value her time and effort and that, if she engages sincerely with this process, she will find you a dependable partner.

Section 2

Conduct a Coaching Session

PURPOSE

To help you conduct productive coaching sessions by providing materials from worksheets you'll fill out to conversational scripts.

WHEN YOU SHOULD USE THESE TOOLS

Use the **Employee Questionnaire** in your first session to get the clear picture of where your employee stands. Set long- and short-term goals with your employee using the **Coaching Plan**. Create a record of each session, and provide accountability for your next meeting with the **Follow-Up Meeting Agenda**.

Consult **Asking the Right Questions** when you need prompts to get the conversation going. To see how certain questioning tactics work in action, read **Case Study: Asking Open-Ended Questions**. And brush up on **Getting in the Coach's Mind-Set** right before each meeting.

WHEN YOU'LL KNOW YOU'RE DONE

You're done when the session ends, but the materials you create during each meeting will continue to be useful. In particular, the coaching plan can serve as a benchmark for future growth and a "mission statement" you'll return to during the rough patches. And you'll reach for your file of follow-up meeting agendas when you want a detailed, concrete account of what both you and the employee have done in pursuit of that mission.

Employee Questionnaire (for the Coach)

Ideally, your employee will already have read these questions and given some thought to her answers before your first meeting with her. Your job is to listen and to help her distill these thoughts into a few concrete goals. For your employee to feel real ownership of the coaching process, the goals need to be *hers*, not yours. Keep your own commentary to a minimum: Let her talk, and pay attention to what she wants to tell you (and what she doesn't).

↓ TOOLS

[Employee Questionnaire](#)

[Coaching Plan](#)

[Follow-Up Meeting Agenda](#)

[Asking the Right Questions](#)

[Case Study: Asking Open-Ended Questions](#)

[Getting in the Coach's Mind-Set](#)

↓ READ MORE

HBR Guide to Coaching Employees

Chapter 1

Shift Your Thinking to Coach Effectively

Chapter 2

Set the Stage to Stimulate Growth

Chapter 4

Holding a Coaching Session

Chapter 6

Giving Feedback That Sticks

Chapter 9

Help People Help Themselves

Chapter 10

Avoid Common Coaching Mistakes

Coaching Plan

The coaching plan, a collaborative tool for both manager and employee, helps you agree on goals and track any resulting agreements. Its purpose is to structure the overall coaching process. It should serve as a kind of compact between you and the employee, specifying what each of you wants out of the coaching relationship and what both of you will put into it.

Employee's Follow-Up Meeting Agenda

The agenda is another collaborative tool, preparing both manager and employee for follow-up coaching sessions. Before each session, the employee should enter her recent accomplishments and immediate plans in the agenda and share it with her manager. The manager may then add a few headline action items to organize the meeting. If you and your employee are unlikely to fill out an agenda together, remember that the owner of this tool is *the employee*.

However you choose to use the agenda, don't lose sight of its basic principle: What happens in each coaching session should be recorded and shared so that both you and your employee are accountable for what happens. Encourage your employee to write down the main points of each session and e-mail you a copy.

Asking the Right Questions

The ability to ask the right questions—questions that will draw out your employee and help her to examine her work and her career goals deeply—is one of the most important skills a coach must develop. These tips and scripts for asking open-ended questions will help keep the conversation between you and your employee as productive as possible.

Case Study: Asking Open-Ended Questions

This fictional case study shows how a key tactic of active listening—open-ended questions—works in action. Part A describes a difficult discussion between a stressed-out manager and an employee who has just floundered her way through a group presentation. After you read this section, pause to consider how you would use open-ended questions to lead a follow-up conversation with this employee. Then read Part B to see how this manager does it.

Getting in the Coach's Mind-Set

This list helps you focus on the kinds of behaviors and attitudes you'll want to bring into each coaching session. Use this tool as a reflective exercise, an opportunity to check your other responsibilities (and any resulting stress) at the door and turn up the dial on your social and emotional intelligence.

Section 3

Keep Coaching After the First Session

PURPOSE

To help you track your employee's progress and offer meaningful support in follow-up coaching meetings—and in between meetings.

WHEN YOU SHOULD USE THESE TOOLS

In preparation for each follow-up coaching session, after each coaching session, and as otherwise needed during the normal course of business.

WHEN YOU'LL KNOW YOU'RE DONE

The task of following up with your employee doesn't end: lending support and providing accountability are the perpetual tasks of a manager. As you get more and more comfortable with coaching, you may no longer need these tools. But keep them around in case you want a refresher.

Preparing for Follow-Up Meetings

Follow-up meetings require a different kind of preparation than a coaching kickoff meeting. This tool will help you keep track of your employee's progress and make good on your own commitments for support and guidance. You may also use the tool to prepare specific feedback and action items for your next meeting.

Good coaching doesn't just happen in designated meetings. It happens all the time, wherever opportunity arises. The work that you do in between sessions will be critical to your employee's success. So give this tool extra time, especially at the beginning of the coaching relationship.

Following Up

This tool includes best practices for following up with your employee right after the coaching session and periodically thereafter. Use this list of tips and questions to make sure that you're providing the best possible coaching experience—one that will have an impact on your employee *outside* of your coaching sessions.

TOOLS

[Preparing for Follow-Up Meetings](#)

[Following Up](#)

READ MORE

HBR Guide to Coaching Employees

Chapter 3

Earn Your Employees' Trust

Chapter 5

Following Up After a Coaching Session



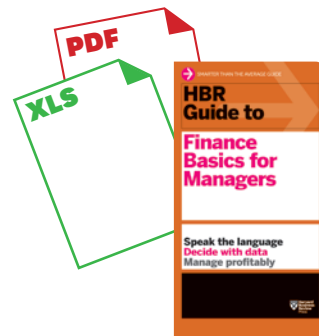
SMARTER THAN THE AVERAGE GUIDE

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