SAL SILVESTER

Coaching Toolkit

Ignite!

The 4 Essential Rules
for Emerging Leaders

Leadership Coaching Grid

Purpose: The purpose of the Leadership Coaching Grid is to assess the strengths and weaknesses of your team members and provide insight into where each team member needs coaching. The leadership coaching grid provides both an individual and collective scan of your team and brings discipline and measurement into your people, coaching, and succession decisions.

Leader Name	Results (1-10)	Relationships (1-10)	Coachability (1-10)	Risk Big Ego, Ineffective Conflict, Controlling Info, Micromanagement (-1 – -5)	Score
Andy Fredrickson	10	10	10	-1 Controlling	29
Abby Connelly	6	10	10	-1 Ineffective Conflict	25
Austin Jones	8	8	9	-2 Big Ego	23
Benny Smith	3	7	8	-1 Ineffective Conflilct	17
Billie D'Angelo	9	7	8	-1 Big Ego	22
Bobby Susskind	7	5	7	-2 Ineffective Conflict	17
Charlie Carolson	8	4	5	-3 Ineffective Conflict	14
Cathy Rodriguez	5	4	6	-2 Controlling	10
Chris Steinman	5	6	3	-4 Big Ego	10

Leadership Dimensions:

•Results: How well does the team member delivers on expected results and goals?

•Relationships: How well does the team member build relationships with others, act as a team player and work collaboratively.

•Coachability: How open is the team member is to feedback/coaching and how willing is he/she to change based on the feedback?

Risk Factors: These are research-proven behaviors that derail a leader's career.

•Controlling Information: controls information, keeps data from others; micro manages people instead of focusing on outcomes

•Big Ego: egocentric behavior, puts self agenda over team and organizational needs

•Ineffective Conflict: overly passive or agreeable, avoids difficult conversations, unassertive in conflict

•Micromanagement: over manages people and details instead of outcome.

How to Calculate Employee Ratings
(1 low to 10 high)

| Results
Achieves results consistently | Relationships
Enables optimal working relationships | Coachability
Open and responsive to feedback |
|---|---|---|
| 1-3 Currently on a PIP (Performance Improvement Plan) | 1-3 Receives formal and informal complaints about working with this person | 1-3 Defensive, argumentative |
| 4-7 Meets most monthly, quarterly, annual goals and objectives | 4-7 Achieves results, sometimes at the cost of relationships | 4-7 Will accept input to improve when required: performance revaluations, for example |
| 8-10 Can be counted on to meet deadlines, exceed objectives, sets a new standard for performance | 8-10 Actively builds relationships and alliances | 8-10 Proactively seeks and responds to inputs from internal and external sources to improve performance |

How to Calculate Derailers

(-1 low to -5 high)

| Conflict
Resolution issues | Ego
Self-centered | Controlling
Creates barriers | Micro
Attitude problems |
|---|---|---|---|
| -1 to -2 times, ineffectively resolves conflict | -1 to -2 Can come across as self-centered at times | -1 to -2 Appears secretive, guarded | -1 to -2 Operates in the weeds, misses the big picture |
| -3 to -4 Actively ignores critical conflicts which need to be resolved | -3 to -4 Cares more about self than the organization | -3 to -4 Seeds recognition through manipulation of information | -3 to -4 Focused on how work gets done more than the actual work product itself |
| -5 Very aggressive, passive and/or passive aggressive behavior negatively impacts business performance | -5 Excessive self orientation directly undermines performance and/or reputation of the business | -5 Actively prevents the sharing of critical information which negatively affects the performance and communication within the business | -5 Micromanagement prevents the natural development of other emerging leaders |

Created by Shapiro Consulting Group, www.BarryShapiroNow.com

Leadership Coaching Grid Worksheet

Instructions for Completing Your Leadership Coaching Grid:

1. Enter each team member's name in the far left column.

2. Assess each team member across the leadership dimensions in the top row and total their score.

3. Subtract points for risk categories.

4. Determine whether each individual is either "green, "yellow" or red" after completing the assessment for each person. Green represents "A" players, yellow represents "B" players and red represents "C" players.

5. Coach accordingly.

Leader Name	Results (1-10)	Relationships (1-10)	Coachability (1-10)	Risk Big Ego, Ineffective Conflict, Controlling Info, Micromanagement (-1– -5)	Score

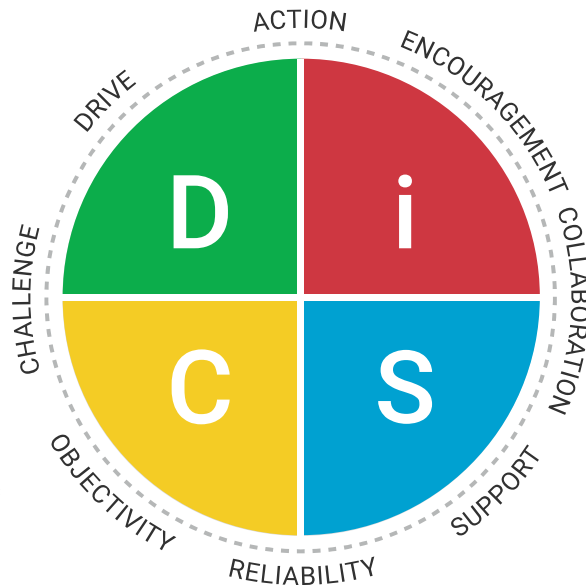# Adapt Based on DiSC Styles

DOMINANCE
Appreciates:
• Big opportunities
• Advancement
• Being in charge

CONSCIENTIOUSNESS
Appreciates:
• Building expertise
• Digging deep into a topic
• Self-sufficiency

INFLUENCE
Appreciates:
• Social and collaborative opportunities
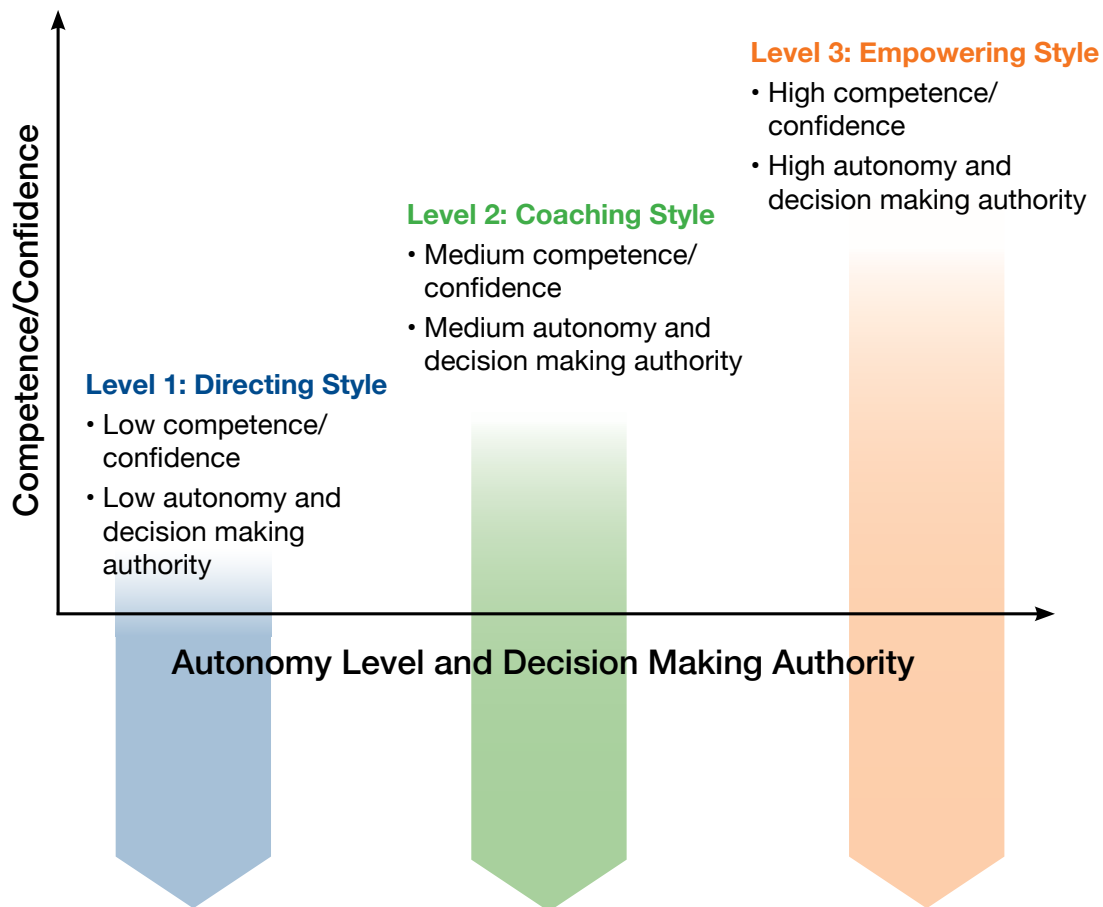• Novelty
• Chances to express themselves

STEADINESS
Appreciates:
• Collaborative opportunities
• A safety net
• Stability

What is the top advantage/strength of my approach to developing talent?

What is the top disadvantage/risk of my approach to developing talent?

ABC Model (Adapt Based on Competence)

Competence/Confidence (vertical axis)

Autonomy Level and Decision Making Authority (horizontal axis)

Level 1: Directing Style
- Low competence/confidence
- Low autonomy and decision making authority

Level 2: Coaching Style
- Medium competence/confidence
- Medium autonomy and decision making authority

Level 3: Empowering Style
- High competence/confidence
- High autonomy and decision making authority

Level 1: Directing Style

- Communicate your intent
- Provide step-by-step plan
- Ask questions to confirm understanding
- Let the team member practice in low-risk situations
- Closely supervise the prioritization, planning and execution of task
- Leader is responsible for decisions

Level 2: Coaching Style

- Communicate your intent
- Collaboratively develop a step-by-step plan
- Ask questions to help team member reach his/her own solutions
- Advise where needed and listen to input
- Provide encouragement to help build confidence
- As competence and confidence build, provide more coaching and less directing
- Leader considers team member's input, but is responsible for decisions

Level 3: Empowering Style

- Communicate your intent
- Team member is fully responsible for approach
- Team member makes decisions
- Team member takes initiative to keep leader updated
- Leader provides resources for team member to be successful

6

Building Blocks of Coaching

Annual Performance Review

A review from the entire year. Employees should NEVER be surprised with the feedback provided.

Quick Quarterly Goal Reviews

Review goals, ask team members how they think they are doing, adjust goals as needed,and provide feedback.

Regular One-on-One Meetings

Conduct with direct reports to help open the lines of communication, understand the support team members need, and provide feedback.

"A-ha!" Moments

The day-to-day opportunities to provide both positive and constructive feedback.

Characteristics of Feedback

Frequent

Make it part of your daily and weekly leadership style and habits.

Specific

Describe the situation and the specific behaviors and actions you saw. Link feedback to goals and values. Keep in mind that general recognition has little to no impact.

Timely

Link feedback to behavior by providing it in a timely manner. People get frustrated and feel marginalized when their contributions go unnoticed. You lose credibility as a leader when you don't provide feedback to team members because other team members notice!

T.-G.R.O.W. Coaching Model

PURPOSE: To help people get unstuck, consider career options or move forward toward a better future state.

T O P I C   Establish a Topic for the coaching session.

What would you like to focus on that would help you move your goals forward?

G O A L   Get clear on the ideal outcome the person is trying to achieve for the topic identified.

What is your vision for the future? What is the ideal outcome that you would like to see happen?

R E A L I T Y   Explore the current situation.

What's working today? What obstacles are getting in the way?

O P T I O N S   Explore ideas and actions the person might take to move forward.

What options are available to you? Imagine it's a year from now and you achieved your goal. What actions did you take? If you weren't limited right now, what would you do?

W H A T ' S   N E X T   Create clear next steps.

Based on our conversation today, what will you do next? By when? What are you ready to do now to make progress toward your goal?

Observer's Form

Instructions

Use this form to record your observations during the practice exercise.

The leader helped clarify the team member's ideal outcome.   ❏ yes   ❏ no

The leader helped the team member understand what could become possible.   ❏ yes   ❏ no

The leader helped the team member see the obstacles more clearly.   ❏ yes   ❏ no

The leader helped the team member understand the cost of not moving forward.   ❏ yes   ❏ no

The leader helped the team member explore different options.   ❏ yes   ❏ no

The leader and team member agreed on next steps and when to follow-up.   ❏ yes   ❏ no

Check for the following assertive communication points:

❏ The leader used "I" statements versus "you" statements.
❏ The leader avoided wishy-washy qualifiers like "maybe," "kinda," and "sorta."
❏ The leader asked for commitment only by saying "will you please…"
❏ The leader owned his/her feedback by saying "I" not "we."

The S.I.I.F. Feedback Conversation

PURPOSE: To Help People Make Course Corrections (Feedback and Feedforward)

01 SITUATION	02 IMPACT/EXPECTATIONS	03 INPUT	04 FOLLOW-UP

SITUATION: Begin by describing the behavior you saw as specifically as possible.

IMPACT AND EXPECTATIONS: Next, describe the impact of the behavior — on you, on other team members, on your customers, etc. Describing the impact helps team members understand the consequences of their behavior. Clarify what you expect from your team member.

INPUT: Ask the team member for input on what they can do to improve. Actively participating in coming up with solutions means they will be much more committed to the solution.

FOLLOW-UP: Schedule time for follow-up to reinforce behavioral change and increase the likelihood of improving performance.

Observer's Form

Instructions
Use this form to record your observations during the practice exercise.

The leader provided an overview of the situation by being detailed and describing behaviors. ❏ yes ❏ no

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[blank box]
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**The leader described the impact of the person's behavior(s) to others – the team, customers, etc.
If appropriate the leader also clarified her expectations.**   ❏ yes   ❏ no

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[blank box]
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The leader asked the team member for input on how improvement could be achieved.   ❏ yes   ❏ no

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[blank box]
```

The leader and team member agreed on a plan and set a time to follow-up.   ❏ yes   ❏ no

```
[blank box]
```

Check for the following assertive communication points:

❏ The leader used "I" statements versus "you" statements.

❏ The leader avoided wishy-washy qualifiers like "maybe," "kinda," and "sorta."

❏ The leader asked for commitment only by saying "will you please…"

❏ The leader owned his/her feedback by saying "I" not "we."

After Action Assessment (AAA)

PURPOSE: Follow-up in a way that enhances learning and commitment.

STEP 1
What did you intend to do?

STEP 2
What actually happened?

40% of the time spent in the conversation

STEP 3
What did you learn?

STEP 4
What are your next steps?

60% of the time spent in the conversation

Observer's Form

Instructions

Use this form to record your observations during the practice exercise.

The leader helped the team member ground back in their intentions.   ❏ yes   ❏ no

The leader helped clarify the actual actions that the team member took.   ❏ yes   ❏ no

The leader brought out learnings from the experience.   ❏ yes   ❏ no

The leader and team member agreed on next steps and when to follow-up.   ❏ yes   ❏ no

Check for the following assertive communication points:

❏ The leader used "I" statements versus "you" statements.

❏ The leader avoided wishy-washy qualifiers like "maybe," "kinda," and "sorta."

❏ The leader asked for commitment only by saying "will you please…"

❏ The leader owned his/her feedback by saying "I" not "we."

Communication Tips for Coaching

Focus on behavior, rather than attitude.

Describe the behavior you see and its impact on you and/or the team. Don't try to evaluate or imagine the reason for the behavior (you cannot read minds).

Behavior: "Your report was late and it delayed our ability to get the master report out on time."

Attitude: "You deliberatively turned in the report late because you do not care about this project."

Use "I" versus "You."

"You" language raises defensiveness and comes across as accusatory.

❏ I: "I would like to discuss the way you talk to sponsors on the phone."

❏ You: "You have a problem talking to sponsors on the phone and we need to talk."

Stop doing the following:*

❏ Saying , "You know," "maybe," "kinda," "sorta," "I guess." Restate in a more clear, direct, and confident manner without wishy-washy qualifiers.

❏ Asking, "can you," "could you," "would you," "why don't you," "would you mind," "do you think." The only true way to ask for commitment and action is, "Will you please…"

Own your feedback.*

Instead of saying "we" think, believe, or feel…state:

❏ Your opinions by "I believe…"

❏ Your feelings with "I feel…(mad, glad, sad)"

❏ Your thoughts with "I think…"

modified from "Developing Positive Assertiveness" Sam R. Lloyd

Create a Coaching Plan

Sample Team Member Coaching Plan

Team Member Name	Nyah Williams (Sample coaching plan)

Leadership Coaching Grid Observations	DiSC Style Needs Competence Level Needs	Coaching Strategies/Plan
Strong technical delivery; not sharing ideas in meetings	Steadiness; team player, patience, accepting	Provide SIIF feedback; follow-up in 1-1 after our next team meeting Show sincere appreciation; listen intently during my coaching session
Hitting key milestones without an issue; team player, noticing some overwhelm; needs to ask for help	Steadiness: putting own needs last	Use G.R.O.W. model to coach through overwhelm and ask others for help.
	Lower level of competence in engineering	Use a more hands on approach (directing style) to support the next phase of software development

Create a Coaching Plan

Team Member Coaching Plan

Team Member Name	

Leadership Coaching Grid Observations	DiSC Style Needs Competence Level Needs	Coaching Strategies/Plan

Coaching Tracker

How do I track my feedback efforts?

Team Member Name	Date	Description of Positive or Constructive Feedback Provided

Success Tips

• Make feedback and recognition a daily part of your leadership style and habits.

• Track the frequency of your feedback and recognition efforts with each of your team members.

• Understand the preferences and priorities that are motivating to your individual team members.

• Make it timely for impact.

Assumptions About Turn-Around Coaching

- We can conduct turn-around coaching, and everything else we do as leaders, in a way that maintains a team member's sense of self-worth and dignity. Marginalizing people is not an effective way to gain their commitment in the long run.

- The turn-around coaching process is typically conducted when behavioral change does not result from developmental coaching.

- Everyone has a right to know what is expected of them and what they need to do to succeed.

- Turn-around coaching is a process to help people succeed and to let them know when they are not meeting your expectations. We don't make threats.

- The same principles apply as in developmental coaching – turn-around coaching should be behavioral based, specific, and timely. Leaders must balance the characteristics of being demanding with being empathetic.

- The team member must be involved in the process in order to gain commitment to behavioral change. He or she must take responsibility for making the change.

Notes

The Turn-Around Coaching Continuum

Verbal Counseling	Written Reminder	Day of Decision

Verbal Counseling

- First step when the developmental coaching process does not result in desired behavioral changes

- Formal conversation with leader and team member about performance issue or behavior problem

- Agree on clear actions and follow-up

- Document verbal conversation in employee file

Written Reminder

- Second step to help an employee be successful when verbal counseling does not produce desired behavioral change

- The formal conversation happens without threats and is designed to help a team member be successful

- Gain commitment for specific actions from the team member

- Provide written documentation in the employee file

Day of Decision

- Replaces the "written warning" or "placing a person on probation"

- After a conversation with leader, team member takes a one day paid disciplinary suspension to reflect on a final decision—whether to be fully committed to making performance/behavioral change or leave the organization to find more satisfying work elsewhere

- If the employee chooses to stay, they create a written action plan

- Upon return the following day, leader and team member discuss decision and clarify next steps

- Provide written documentation in the employee file

Success Tips

- Consult HR when in doubt and follow organizational policies.

- Focus on behavior.

- Maintain your team member's sense of self-worth and dignity.

- Document the discipline.

The Turn-Around Coaching Conversation

SITUATION – IMPACT – INPUT – COMMITMENT AND FOLLOW-UP – CONFIRM CONTINUUM

SITUATION: Begin by describing the behavior you saw as specifically as possible. The behavior may be a performance issue or behavioral problem.

IMPACT AND EXPECTATIONS: Next, describe the impact of the behavior—on you, on other team members, your customers, etc. Describing the impact helps team members understand the consequences of their behavior. Clarify what you expect from your team member.

INPUT: Ask the team member for their input. Actively participating in coming up with solutions means they will be much more committed to the solution.

• Ask about their perspective of the issue or problem.
• Ask for their ideas for improvement.

COMMITMENT AND FOLLOW-UP: Agree on an action plan and schedule time for follow-up to reinforce behavioral change.

CONFIRM TURN-AROUND COACHING CONTINUUM: Communicate where the team member is within the turn-around coaching continuum and provide positive encouragement.

Observer's Form

Instructions: Use this form to record your observations during the practice exercise.

The leader provided an overview of the situation by being detailed and describing behaviors. ❏ yes ❏ no

The leader described the impact of the person's behavior(s) to others—the team, customers, etc.—and communicated expectations. ❏ yes ❏ no

The leader asked the team member for input on how improvement could be achieved. ❏ yes ❏ no

The leader and team member agreed on a plan and set a time to follow-up. ❏ yes ❏ no

The leader communicated appropriate information from the turn-around coaching continuum and provided positive encouragement. ❏ yes ❏ no

Check for the following assertive communication points:

❏ The leader used "I" statements versus "you" statements.

❏ The leader avoided wishy-washy qualifiers like "maybe," "kinda," "sorta."

❏ The leader asked for commitment only by saying "will you please…"

❏ The leader owned his/her feedback by saying "I" not "we."

Notes