# Associate Coaching Roadmap

"My job as coach is to help you succeed at your very important job!"

# Name of Associate Date

1

### Set the Context for Coaching

- Clarify your intention to coach.
- Clarify your vision and philosophy.
- Identify who you intend to coach.
- · Communicate how you intend to coach.
- Build trust in each coaching relationship.

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#### Coach to the Need

- Clarify / reclarify specific expectations and goals.
- Observe the associate's practices and progress.
- Diagnose specific coaching needs.
- Address those coaching needs.
- Hold focused coaching discussions on those needs.
- Ensure a conducive environment for success.

2

#### **Create the Plan**

- Discuss and define the associate's role and unique contribution.
- · Clarify the associate's key work results.
- · Clarify the associate's key work behaviors.
- Discuss the associate's relevant strengths and needs.
- Discuss and define the associate's success goals.
- Discuss and define the associate's growth goals.

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#### **Review Success**

- Hold focused review discussions at least three times per year.
- REVIEW planned results to actual results.
- $\bullet \ REINFORCE \ strengths \ and \ successes.$
- REALIGN priorities and practices.
- · RENEW commitment and focus.

3

#### **Coach to the Plan**

- Make daily contact with the associate.
- Hold regular 1-on-1 discussions with the associate.
- Follow-up with the associate on key success goals
- · Issue coaching challenges.
- · Verify progress and success.

### Why I Intend to Coach This Person

What is my vision of successful coaching with this person?	What are the desired outcomes of my coaching with this person?

#### **How I Intend to Coach**

What will this person see me doing as a coach?	What will this person be doing in this process?

### **Prepare the Relationship for Coaching**

What will I do to prepare this relationship for successful coaching?	

# Success Plan Worksheet

Associate's Name	Date
Formal Role Description	Unique Contribution
Key Work Results	Key Work Behaviors
Relevant Strengths	Development Needs

### **Work Success Goals**

Success Goals (SMART)	Measurement Method	Target/Standard	Status
1:			
2:			
3:			
4:			
5:			

#### **Growth Goals**

How I will increase my capacity to succeed.	Outcome	Target Date Completion Date
1:		
2:		
3:		
4:		
5:		

# Coach to the Plan 1-on-1 Coaching Discussion Record

### **Coaching Discussions**

	Date	Main Topic(s)	Challenges / Commitments	Follow-up / Outcomes
1:				
2:				
3:				
4:				
5:				
6:				
7:				
8:				
9:				
10:				

# 3 1-on-1 Coaching Discussion Template

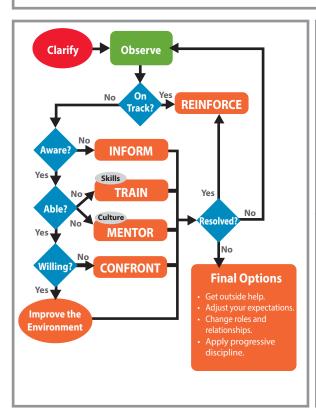
Follow-up - "How should I follow-up with you? When should we check in on this?"  Status  Follow-up  Plan/Challenge Factors  Plan/Challenge Factors  What do you need to accomplish?"  Where are you currently?"  "What's helping? What's hindering"  Plan / Challenge - "Whot do you see as your next steps? Can I give you a challenge?"	Name	Da	te	
"What do you need to accomplish?"  "Where are you currently?"  "What's helping? What's hindering"  Plan / Challenge - "What do you see as your next steps? Can I give you a challenge?"	Engage - "What's on your mind?"		Follow-up Status	
Follow-up - "How should I follow-up with you? When should we check in on this?"	Plan / Challenge - "What do you s	see as your next steps? Can I give you a challenge?"		
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### 4

### **Coach to the Need**

Worksheet (side 1)





Individual Ability	Individual Motivation
Environmental Ability	Environmental Motivation

Match Your Approach to the Need:

REINFORCE ENVIRONMENT
INFORM
TRAIN
MENTOR
CONFRONT

Adjust Your Style to the Need:		
1 - "I Decide"		
<b>2</b> - "Let's Talk, I Decide"		
<b>3</b> - "Let's Talk, Let's Decide"		
4 - "Let's Talk, You Decide"		
5 - "You Decide"		



### **Coach to the Need**

Worksheet (side 2)

### 2 Engage

- · Set the tone.
- Clarify purpose & outcome.
- · Establish the process.
- Keep it focused, safe, productive.

Purpose

Outcome

### 3 Mutual Understanding



- Reclarify the purpose
- Discuss Goal, Status, Factors, Plan, and Follow-up
- Explore (ask, listen, reflect, check)
- Inform (describe what you see and the impact)
- Summarize

Goal

Status

Factors

### 4 Commit to Action

- Transition to action planning
- Get commitment on key actions, outcomes, and deadline.
- · Set a follow-up date

Plan / Challenge

### 5 Follow-up

- Build the relationship
- Ensure accountability
- Hold follow-up
- Learn from the experience

Follow-up Date

Follow-up Notes

# Review Success Discussion Record

Review Discussion 1	Date:	
REVIEW - Planned Results to Actual Results REINFORCE - Key Strengths and Success REALIGN - Priorities and Practices RENEW - Commitment, Focus, and Energy	NOTES:	
Discussion 2	Date:	
REVIEW - Planned Results to Actual Results REINFORCE - Key Strengths and Success REALIGN - Priorities and Practices RENEW - Commitment, Focus, and Energy	NOTES:	
Discussion 3	Date:	
REVIEW - Planned Results to Actual Results REINFORCE - Key Strengths and Success REALIGN - Priorities and Practices RENEW - Commitment, Focus, and Energy	NOTES:	