

# 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.

## 4 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.

## 5 Review Success

- Hold focused review discussions at least three times per year.
- REVIEW planned results to actual results.
- 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.

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## 1

# Set the Context for Coaching

## Worksheet

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### Why I Intend to Coach This Person

<p>What is my vision of successful coaching with this person?</p>	<p>What are the desired outcomes of my coaching with this person?</p>
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### How I Intend to Coach

<p>What will this person see me doing as a coach?</p>	<p>What will this person be doing in this process?</p>
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### Prepare the Relationship for Coaching

<p>What will I do to prepare this relationship for successful coaching?</p>
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**2**

# 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:		

## 3

# 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

Name

Date

**Engage** - "What's on your mind?"

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**Goal**

*"What do you need to accomplish?"*

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**Status**

*"Where are you currently?"*

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**Factors**

*"What's helping? What's hindering?"*

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**Plan / Challenge** - "What do you see as your next steps? Can I give you a challenge?"

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**Follow-up** - "How should I follow-up with you? When should we check in on this?"

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# 4 Coach to the Need

## Worksheet (side 1)

### 1 Headwork - Diagnose

Desired Situation (Goal)	Current Situation (Status)
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	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; padding: 10px;">Individual Ability</td> <td style="width: 50%; text-align: center; padding: 10px;">Individual Motivation</td> </tr> <tr> <td style="width: 50%; text-align: center; padding: 10px;">Environmental Ability</td> <td style="width: 50%; text-align: center; padding: 10px;">Environmental Motivation</td> </tr> </table>	Individual Ability	Individual Motivation	Environmental Ability	Environmental Motivation
Individual Ability	Individual Motivation				
Environmental Ability	Environmental Motivation				

Match Your Approach to the Need:

<input type="radio"/> REINFORCE	<input type="radio"/> ENVIRONMENT
<input type="radio"/> INFORM	
<input type="radio"/> TRAIN	<input type="radio"/> FINAL OPTIONS
<input type="radio"/> MENTOR	
<input type="radio"/> CONFRONT	

Adjust Your Style to the Need:

- 1 - "I Decide"
- 2 - "Let's Talk, I Decide"
- 3 - "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
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### 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
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### 5 Follow-up

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

Follow-up Date	Follow-up Notes
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## 5

# 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: