



Laying the Groundwork for Successful Coaching Efforts

Your Guide for Developing Effective Coaching Plans

This guide provides a framework around developing a successful coaching plan. The focus is on individual goals for team members that identify development and growth opportunities.

After reading this guide, studying the examples provided, and completing activities, you should be able to:

DEVELOP a coaching plan that aligns individual performance with department and institutional goals.

USE a variety of methods to assist with identifying development and growth opportunities.

UNDERSTAND how to write effective goals and the difference between critical skills, activities and accomplishments.

KNOW how to use the coaching plan as an effective coaching tool.

Scheduled Coaching

- ▶ Planned time for 1:1 meetings that occur on a regular basis and serve as an opportunity to level, set and refine developmental focus.

One of the goals of a coaching culture is to utilize both integrated and scheduled coaching to create a framework for successful coaching efforts. This guide is focused on scheduled coaching and how to effectively use the coaching plan template to ensure you are successfully coaching your team.

Scheduled coaching sessions:

- ▶ Create a foundation for consistent coaching efforts by setting goals that help define development and growth opportunities.
- ▶ Ensure the supervisor’s coaching activities are supporting the team member’s development goals.
- ▶ Help the coach know “what to coach to” during in-the-moment, integrated coaching opportunities.

WHAT YOU NEED TO KNOW

1

The HSC Values-Based Coaching Culture will include scheduled coaching sessions between supervisors and their team members.

2

These scheduled sessions will occur three times a year, and will include a formal coaching plan template.

3

The coaching plan is a shared responsibility between the team member and the supervisor.

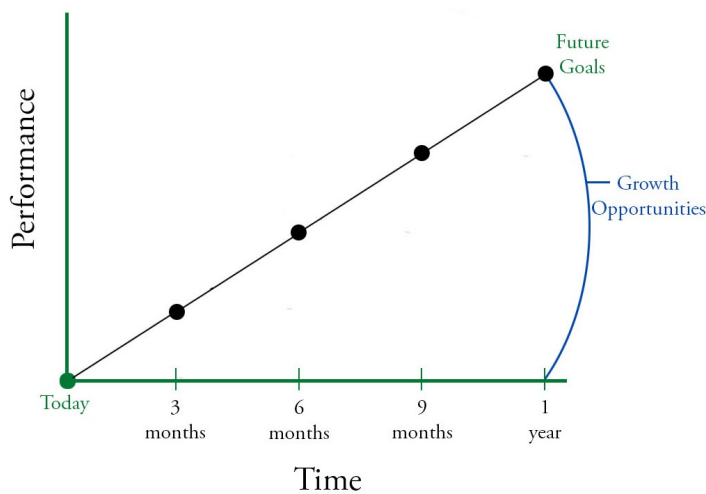
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Team members will initiate the plan, and supervisors will provide guidance in creating a coaching plan that sets meaningful goals.

An important element of coaching is identifying growth opportunities for individual team members.

The Growth Opportunity Analysis helps us understand and create a visual picture of growth --- whether it's future goals for an individual team member, future growth of the institution, or team goals a department is aiming to achieve.

Opportunity Analysis



WHAT IT DOES NOT

What the Opportunity Analysis does not do is help define how the team member will reach their future goals, or how HSC will achieve its vision: "Be the team of choice for education, discovery and health care."

In order to achieve this, we need to first identify how the team member wants to grow and how they need to grow to contribute and achieve the department and organizational goals. This is the role of scheduled coaching.

Growth Opportunities

Coaching Culture Goal #1

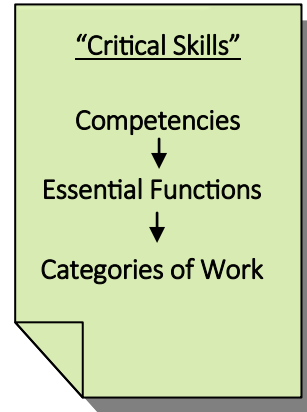


Recognize opportunities to grow and develop

Identify Skills To Develop

Before you begin developing a coaching plan, you'll first need to understand a basic framework for identifying skills each member of your team needs to develop.

1. The framework starts with "critical skills" or competencies a team member needs to achieve success in their role. Think of critical skills as essential functions or categories of work.



2. List three to five critical skills or competencies the team member needs in his or her role.

Employee Name	Most Critical Skills For This Role	Strength?	Development Area?
John Smith	1. Communication		
	2. People Management		
	3. Project Management		
	4. Customer Service		
	5. Office Duties		



3. Decide if the skill is a strength or development area. Use standards defined by your department or rely on your own professional judgment. If you're unsure, think about what you would reasonably expect of someone in this role.

Employee Name	Most Critical Skills For This Role	Strength?	Development Area?
John Smith	1. Communication	x	
	2. People Management		x
	3. Project Management	x	
	4. Customer Service	x	
	5. Office Duties		x



Inventory of Employee Strengths & Development Areas

Before you identify the areas you need to coach, you should understand the skills your team members need to succeed in their current roles. Use the template below to record where your team members stand against the most critical skills and competencies for their roles.

Employee Name	Most Critical Skills For This Role	Strength?	Development Area?
	1.		
	2.		
	3.		
	4.		
	5.		

Employee Name	Most Critical Skills For This Role	Strength?	Development Area?
	1.		
	2.		
	3.		
	4.		
	5.		

Employee Name	Most Critical Skills For This Role	Strength?	Development Area?
	1.		
	2.		
	3.		
	4.		
	5.		



Key Coaching Point:

▶ Coaching Should Focus on Strengths, Not Just Weaknesses

- ▶ Strengths are usually what a team member will rely on to stand out from his or her peers and these strengths are what will push a team member's overall performance to the next level.
- ▶ Weaknesses, or low performance areas, should be addressed so they don't derail advancement or create a career stall, but focusing only on weaknesses is demotivating, and sends the wrong message that you aren't invested in the team member's development.

Managers often fall into a habit of coaching their team to correct performance weakness. While this is critically important, it should not be the only time managers coach as it implies coaching only occurs when a team member does something "wrong." By focusing your coaching efforts on a team member's strengths, you reinforce positive behaviors and further develop strengths that directly benefit your team.

Example: **Strength = Communication**

- ASK :**
- ▶ How does the team member currently use this strength?
 - ▶ How will he/she need to use it in the future to continue to grow and develop in his/her role?

To identify how the team member uses this skill, think about the activities they perform.

Activities are actions that produce a result, and are typically described through the use of verbs.

Activities for communication might include:

- * Writes clear and concise emails
- * Listens to other team members
- * Encourages feedback from others
- * Facilitates effective presentations

How can you develop a strength?

Current Responsibility: Facilitating presentations for the team.

Challenge: Facilitating presentations for other departments or leadership.

By developing strengths, you are reinforcing behaviors that you want to continue, while at the same time allowing the team member to work in an area that energizes them. The result is increased motivation and satisfaction in his or her role.

As important as it is to build strengths and development areas that a team member needs now, it is also important to build skills that he or she will need for future roles.

This conversation guide is designed to ensure you have a firm understanding of a team member’s career aspirations. By assuming that an individual will follow a particular career path, you risk expending effort developing skills he or she may not want or need in the future.

Conversation Guide	
Questions to Ask Your Team Member	Team Member Responses
Questions About Your Current Goals	
What is your favorite part of your current role?	
What would you describe as your biggest strength?	
What one skill would you like to develop to improve in your current role?	
Questions About Your Future Roles?	
If there is one task or project type you’d like to do more frequently in your future roles, what would you select?	
If there is one task or project type you’d like to do less frequently in your future roles, what would you select?	
Questions About My Role (as our supervisor)	
How can I best help you in your current role?	
How can I best help you achieve your career goals?	
Are there other individuals you would like me to enlist to help you achieve your career goals (e.g. a colleague in a role you interested in pursuing)?	

Career Planning Questionnaire

- ▶ By having career planning conversations with your team members early, you not only ensure that your efforts are focused on the right skills, but you send the message that you are invested in their long-term goals.
- ▶ **Collaborate on Development Goals.** Even if you do all the work to identify strengths and short and long-term goals—it’s still up to your team to reach the milestones and hit the goals. If they don’t agree with the goals you’ve identified, your coaching efforts will be wasted. To ensure your coaching efforts yield the maximum benefit, collaborate with your team to ensure they will put effort into building skills that benefit them, the team and the institution.

Coaching Plan Overview

Good coaching plans share some common characteristics:

- ▶ They are created after careful assessment by both the team member and supervisor.
- ▶ They leverage a team member's strengths and focus on growth opportunities.
- ▶ They contain a plan for a team member to meet goals with coaching from his/her supervisor.
- ▶ They explain the standards upon which achievement of goals will be measured.
- ▶ They provide opportunity for revisiting and reassessing goals.

The coaching plan is a tool that assists you in creating a foundation for consistent coaching efforts. In addition, it ensures the supervisor's coaching activities support individual growth and development opportunities for each team member.

1 HSC Always Goals

The foundation of a coaching plan begins with our shared mission, vision and values, which align through the HSC Always Goals. Looking at these goals first allows you to see where you and your team fit into the overall picture.

2 Department Action Plan

The plan identifies the link between individual, department and HSC Always Goals. Remember, we find motivation when we see how "what we are doing" impacts the overall institutional goals.

3 Individual Goals

Both supervisor and team member will share responsibility to create goals, as a collaborative environment generates a motivation factor when it comes to performance.

4 Measure

It's important to identify how team members will track their development progress. The tough part for this section is being specific enough so there is a clear understanding of what they should be achieving.

5 Resources Needed and Action Steps/Plan

Identifying resources and actionable next steps the team member will take to begin the process of achieving the goal is critical. This section is more than just a list of steps and goes beyond simply attending a training course.

6 Personal Goals

It's also important to have an understanding of the team member's long-term career, personal, or educational goals. This helps ensure that your coaching efforts are focused on the right skills, relevant to the team member.

UNT Health Science Center - Coaching Plan					
Team Member:		Position Title:		<input type="checkbox"/> 90 day <input type="checkbox"/> April <input type="checkbox"/> August <input type="checkbox"/> December	
Date:		Time with UNTHSC:		Department: Reviewer:	
Cross Training and Educational Interests			Committees/ Awards/ Volunteer Hours		
8			9		
HSC Always Goal	Department Action Plan	Individual Goal	Measure	Resource Needed	Action Steps / Plan
1	2	3	4	5	
Team Member Personal Goals: Career / Personal / Educational / Organizational		Progress	Timeline	Resource Needed	Action Steps / Plan
6					
Values	Accomplishments, Contributions, Strengths		Growth Opportunities		
Serve Others First	7				
Integrity					
Respect					
Collaboration					
Be Visionary					
Team Member Signature / Date			Reviewer Signature / Date		

7 Values: Accomplishments, Contributions, Strengths

Each team member complements our shared values through his or her own actions and behaviors. By asking team members to share how they are living our core values, we promote awareness around the behaviors and actions, that also provide a foundation for coaching.

8 Cross Training and Educational Interest

This is an opportunity to identify areas for growth outside of the team member’s goals. These may not be areas you would coach to, but rather assist to identify a mentor, formal classes, job rotations or other colleagues that could assist in the team member’s development.

9 Committees/Awards/Volunteer Hours

Don’t forget that the best coaches get to know their team members. This section helps identify interests of the team member. Activities and associations identified in this section may relate to work or may be focused on the team member’s personal commitments.

Understanding Goals

- ▶ Even though a coaching plan should have goals that reflect the type of work described in the team member's position description, the coaching plan does not have to mirror it.

How would you define the word goal?

In simple terms, a goal identifies clearly defined expectations for success.

In essence, it's what we hope to accomplish, or achieve.

In some organizations, goals become a reflection of work duties and responsibilities copied from a team member's job position description.

This is an inaccurate way to look at goals.

Coaching plans based on position descriptions generally describe activities, not accomplishments. Individual Goals on the coaching plan should identify growth opportunities for the team member and the accomplishment he/she hopes to achieve.

DISTINGUISHING ACTIVITIES FROM ACCOMPLISHMENTS

Accomplishments are the result or outcome of an activity.

Examples:

- ▶ Increased customer satisfaction
- ▶ Reduced number of patient complaints

Activities are the day-to-day tasks and responsibilities.

Examples:

- ▶ Greet customer with a smile, and promptly answer phones
- ▶ Coordinate room schedules
- ▶ File papers

The coaching plan template is designed around the S.M.A.R.T. goal method. This goal setting method is an effective way to clarify exactly what a team member needs to achieve, and helps set measures to identify if the team member has been successful.

S.M.A.R.T. GOALS ARE:

<p>Specific</p>	<p>Specific goals let your team know what is expected of them and avoid confusion about what is to be accomplished.</p> <p>Specific goals might answer:</p> <ul style="list-style-type: none"> ▶ Who is responsible? ▶ What must be accomplished? ▶ What is the benefit of this goal?
<p>Measurable</p>	<p>When setting goals, it is important to set specific criteria for measuring progress against those goals. This helps your team know if they are on track for reaching milestones.</p>
<p>Attainable</p>	<p>Goals that set the bar “too high” or are “unattainable” create frustration and disengagement. Setting realistic goals that the team member perceives as achievable creates a motivating environment for success.</p>
<p>Relevant</p>	<p>Your team will need to understand “how” their individual accomplishments and activities impact the department and institution. This creates a level of commitment and pride in accomplishing the goal.</p>
<p>Time-Bound</p>	<p>The most effective goals identify a timeframe that allows the team member to know if he or she is on schedule.</p>

S.M.A.R.T. Goals

- ▶ A common mistake when creating development goals is to provide ambiguous targets that leave both supervisor and team member confused about what is to be accomplished.

Developing a Coaching Plan

- ▶ "A mere 7% of employees today fully understand their company's business strategies and what's expected of them in order to help achieve company goals."
 - Robert S. Kaplan and David P. Norton, "The Strategy-Focused Organization," Harvard Business School Press, 2001

Step

1

Look at the Overall Picture

To develop the coaching plan, begin the process by looking at the institution's overall picture. This starts with the mission, vision, values and goals already available. Determine which ones your team can affect.

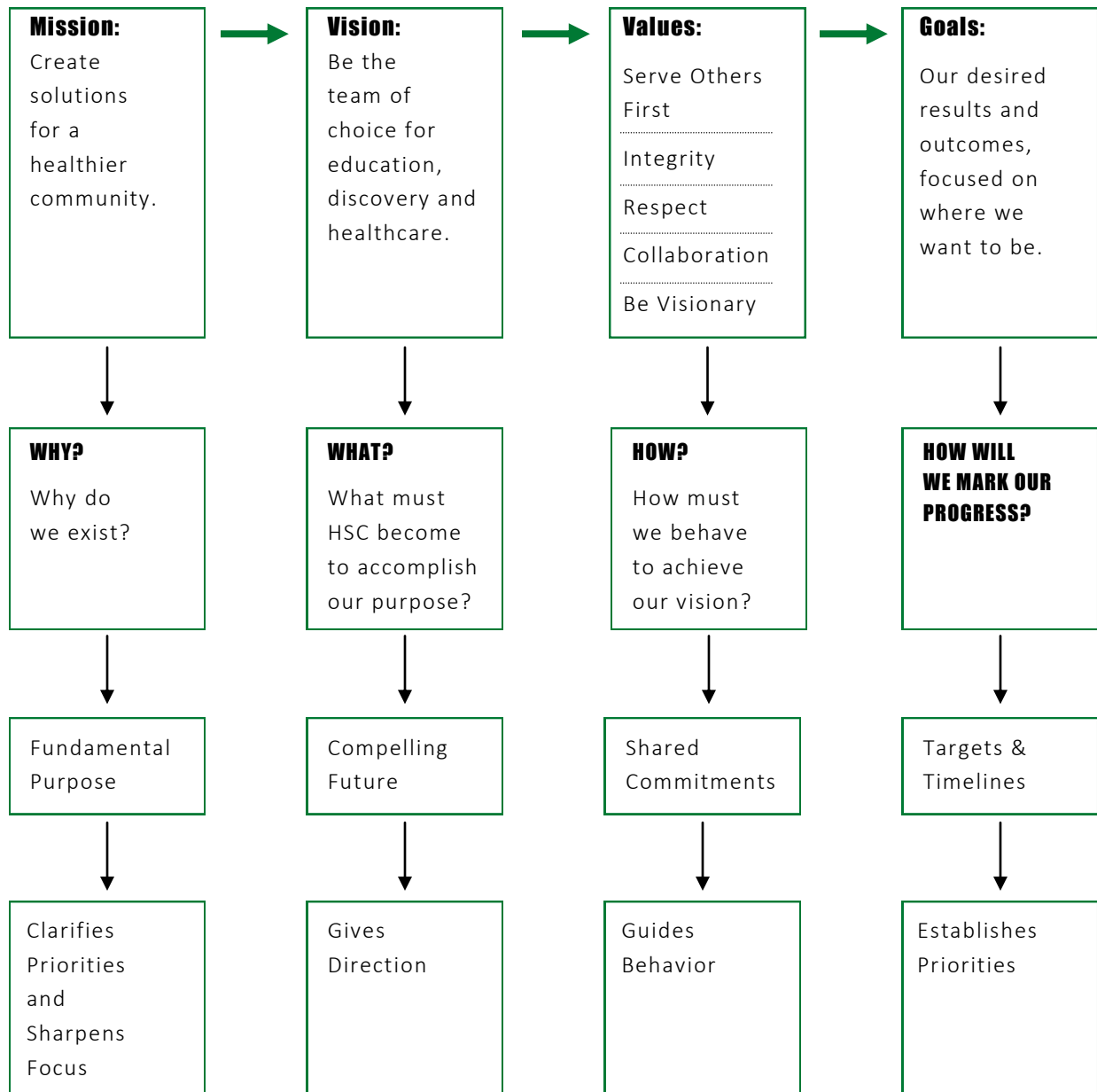


CONSIDER THE FOLLOWING QUESTION:

- ▶ What are the HSC Always Goals and objectives and where does my department fit into the overall picture?

ALWAYS GOALS	OBJECTIVES
Be an Extraordinary Team	<ul style="list-style-type: none"> ▶ Build people system ▶ Build team alignment
Do Better in Everything	<ul style="list-style-type: none"> ▶ Expand integrative models: interprofessional education (IPE), faculty development ▶ Expand and increase access to educational program offerings ▶ Develop single definition of Educational Quality for UNTHSC
Create Experiences and Outcomes that Exceed Expectations	<ul style="list-style-type: none"> ▶ Define extraordinary service and quality ▶ Provide customer service education ▶ Develop & implement comprehensive Customer Service program
Maximize Key Resources and Increase Profitability	<ul style="list-style-type: none"> ▶ Improve efficiency and effectiveness of organizational structure to strategically maximize educational research and clinical opportunities ▶ Focused growth and diversity of our research, clinical and financial portfolio ▶ Increase cost efficiencies

Our shared mission, vision, values and goals create a foundation or framework of the overall picture for the Health Science Center. We can look at each of these as a pillar of our foundation to understand how they work together.



Developing a Coaching Plan

- ▶ When determining the department action plan, you may find it helpful to focus on the customer. Understanding who your customer is and what they expect from you can assist you in developing an action plan that impacts our mission and vision.

Questions to consider:

- ▶ Who are our customers—both internal and external?
- ▶ What do our customers expect from us?

Step 2 Determine Department Action Plan

The next step in this 7-step method is to identify or review your department action plan. The action plan for your department is “what” you will focus on to achieve the HSC Always goals.



CONSIDER THE FOLLOWING QUESTIONS:

- ▶ What are the actions, projects or focus of our team that support the Always Goals?
- ▶ Does the department support multiple organizational goals, but not all?

Clearly tying the department action plan to organizational goals is key to this process. If a department finds it does not affect organizational goals, the department needs to analyze the situation. It may decide to modify or eliminate the action plan.

Step

3 Determine Individual Goals That Support the Department Action Plan

This step focuses on the individual team member’s contribution to the success of the department and organization through the development of individual goals. Before a goal to be developed, it’s important to identify accomplishments the team member needs to achieve.

The table below presents a simplified approach to identifying individual contributions through the use of the *role-results matrix* with columns and rows to identify individual accomplishments for department action plans.

ROLE - RESULTS MATRIX

Team Member	Department Action Plan 1:	Department Action Plan 2:	Department Action Plan 3:	Department Action Plan 4:
Team Member 1	Accomplishment	Accomplishment	Accomplishment	Accomplishment
Team Member 2	Accomplishment	Accomplishment	Accomplishment	*N/A
Team Member 3	Accomplishment	*N/A	Accomplishment	Accomplishment
Team Member 4	*N/A	Accomplishment	Accomplishment	Accomplishment

* Denotes the team member has no part in achieving the department action plan.

Create a matrix for your team.



CONSIDER THE FOLLOWING QUESTION:

- ▶ What must this team member achieve/accomplish to support this particular department action plan?

The accomplishments you list for each team member are possible individual goals that might be included on the team member’s coaching plan.

Developing a Coaching Plan

- ▶ This guide has already identified two key points to keep in mind as you begin goal development with your team:
- ▶ Identify critical skills that are strengths and development opportunities.
- ▶ Goals should focus on accomplishments, not activities.

Note: Activities will be part of the coaching plan, but identified under action steps.

Developing a Coaching Plan

- ▶ If relevant, measures should include a target completion date. Without a completion date, team members won't know when they are supposed to have the objective completed.
- ▶ Being unable to achieve a specific measure should not be viewed as a failure. Instead, use it as an opportunity to determine how and what changes need to be made to improve performance.

Step

4

Set Individual Measures

Measures are how you and your team determine if goals have been achieved.

It gives your team a way to stay on track by aiming for target dates or milestones, and will have a significant impact on motivation. Tracking progress will also allow you to determine what is working well for your team, and easily identify integrated coaching moments.

1

First determine which type of measures are important.

- ▶ Is quality important?
- ▶ Is quantity important?
- ▶ Is cost-effectiveness important?
- ▶ Is a certain timeframe or date important?

2

Then ask:

- ▶ How can it be measured?
- ▶ Is there a number or percent that could be tracked?

3

Finally, if the goal cannot be measured with numbers, but achievement can be described, then ask:

- ▶ How will I know if the goal was achieved?
- ▶ Is there someone else who can identify success?
- ▶ What factors should I look for?

Step 5 Identify Resources Needed and Action Steps/Plan

Once you have established specific measures that apply to the individual goal, you can begin to write the actions needed to achieve the goal and identify any specific resources required.

Individual Goal	Measures	Resources	Action Steps
Develop plan for XYZ	Draft completed by 10/15/14 and ready to submit for approval	Input and feedback from Communications and Research teams	<p>Schedule brainstorming session with team by 9/1/14</p> <p>Conduct at least two follow-up sessions to review draft and ask for input</p>

↑
Resources may be people or equipment.

Developing a Coaching Plan

- ▶ A common mistake when creating coaching plans is not identifying resources for success. To avoid this error, define how you will help your team member achieve their goals and where they can find additional support.
- ▶ By writing down how you can help the team member, you will be more likely to follow through on those commitments.

Developing a Coaching Plan

- ▶ If growth and development goals are not relevant to our overall personal goals, will we be motivated to achieve them?
- ▶ **Think about this.**
You coach a team member on people management skills so they can be promoted to a supervisor, but then you find out the team member has no interest in a supervisory position.

Step

6

Clarify Personal Goals To Focus Coaching On The Right Skills

Personal goals play an important role in our development at work. In fact, identifying personal goals that impact our growth and development is crucial to our success. It's through our personal challenges and aspirations that we find commitment and motivation to succeed at what we do.

It's important to have an understanding of the team member's long-term career, personal, or educational goals. This helps ensure that your coaching efforts are focused on the right skills, relevant to the team member.

EXAMPLES OF PERSONAL GOALS

- ▶ Focus on positive thinking
- ▶ Learn stress relieving techniques
- ▶ Recognize and appreciate others more often
- ▶ Improve my writing skills

Personal development goals can be directed at the role you are currently filling, or towards a role you would like to fill in the future.

- ▶ Learn new management skills
- ▶ Develop my writing skills
- ▶ Start a Master's program
- ▶ Improve my time management skills
- ▶ Attend training on increasing productivity
- ▶ Take college courses and work towards graduate degree.

Step

7

Recognize How You Are Living HSC Core Values

Our values and goals support each other. When they are not in alignment, it may result in conflict, mixed emotions and even frustration.

The coaching plan helps you coach from values, by ensuring the team member is focused on the core beliefs that drive behavior and commitment and answer the question:

How must we behave in order to achieve our vision?

Our values drive behaviors that determine attitude, choices and actions we choose each day. Mapping values to accomplishments, contributions and strengths creates an awareness for the team member of his or her everyday behaviors and actions, and provide a foundation for coaching.

The following page identifies behaviors associated with each of the HSC core values. This blueprint will help you focus on how team members are living our values in their day-to-day interactions.

Developing a Coaching Plan

- ▶ On the coaching plan, values are both past and future focused.
- ▶ Ask team members to identify how they have been living the values.
- ▶ They may choose to identify accomplishments, contributions and strengths for all values, or they may choose one or two.
- ▶ Encourage each team member to identify growth opportunities for at least one or two values.

Our HSC Values

SERVE OTHERS FIRST

Encourage the growth, well-being and success of people we serve

- ▶ Empower one another to make values-based decisions
- ▶ Consider the impact of your decisions
- ▶ Be good stewards of people and resources
- ▶ Demonstrate compassion, care and humility
- ▶ Promote individual potential

INTEGRITY

Uphold the highest ethical standards

- ▶ Do what is right, not just what is easy
- ▶ Conduct ourselves with honesty, trustworthiness and dependability
- ▶ Be transparent in actions
- ▶ Own, correct and learn from successes and failures
- ▶ Demonstrate loyalty to our mission and vision

RESPECT

Treat everyone with dignity and compassion

- ▶ Gratefully acknowledge contributions and efforts of others
- ▶ Invite other perspectives and encourage dialogue
- ▶ Communicate openly in a timely, courteous and relevant manner
- ▶ Promote diversity of thought, ideas and people
- ▶ Build trust by honoring our word through actions

COLLABORATION

Work together to achieve shared goals

- ▶ Combine our strengths to discover new ideas and share best practices
- ▶ Seek opportunities to engage others and break through barriers
- ▶ Inspire one another to collectively be more than the sum of our individual parts
- ▶ Give, ask for and value feedback
- ▶ Recognize the contributions of others and celebrate successes

BE VISIONARY

Create innovative solutions in the pursuit of excellence

- ▶ Respectfully challenge the way things have always been done
- ▶ Create unique ways to provide remarkable service
- ▶ Navigate change to move us forward
- ▶ Proactively implement new ideas

Quick Reference: Developing Effective Coaching Plans

A 7-Step Process

1 Look at the Overall Picture

- ▶ Start with the mission, vision, values and goals already available.
- ▶ Determine which ones your team can affect.

ASK: What are the HSC Always Goals and objectives and where does my department fit into the overall picture?

2 Determine Department Action Plan

- ▶ Identify or create a department action plan that impacts HSC Always Goals.
- ▶ Focus on accomplishments of the department, not activities.

ASK: What are the actions, projects or focus of our team that support the Always Goals?

3 Determine Individual Goals That Support the Department Action Plan

- ▶ Use the role-results matrix to identify how the team member will contribute to the department action plan.
- ▶ Identify accomplishments (results or outcomes), not activities (tasks, duties, work responsibilities).

ASK: What must this team member achieve/accomplish to support this particular department action plan?

4 Set Individual Measures

- ▶ Create measures to track progress and motivate your team towards success.

ASK: Which types of measures are important?

If the goal cannot be measured by numbers, but achievement, what factors can we use to identify success?

5 Identify Resources Needed and Action Steps/Plan

- ▶ Write action steps that identify the day-to-day activities that the team member will complete to achieve the goal.
- ▶ Identify resources needed. This might be equipment or people who will support the team member.

6 Clarify Personal Goals to Focus Coaching on the Right Skills

- ▶ Gain an understanding of the team members long-term career, personal and educational goals.
- ▶ These might be true personal goals, or focus on developing skills that impact current or future roles.

7 Recognize How You Are Living HSC Core Values

- ▶ Identify behaviors the team member has exhibited that identify how he or she is living the values.
- ▶ Explore growth opportunities that will help the team member exhibit behaviors consistent with the core values.

ASK: How must we behave in order to achieve our vision?

**Ultimate
Measure
of Coaching
Success is the
Team Member's
Growth**

A coaching plan benefits both the supervisor and team member.

First, it sets a plan for consistent coaching efforts across a development cycle. This ensures steady growth through continuous coaching, versus coaching “periodically” or to “put out fires.”

Next, it helps the supervisor focus coaching efforts on one or two critical skills and ensures alignment between your coaching efforts and the team member’s growth opportunities.

Although there are identified milestones and targeted dates to remind you to coach, the true measure of your coaching efforts is the degree to which your team member has grown and developed.



UNT Health Science Center - Coaching Plan

Team Member:	Position Title:	Department:	<input type="checkbox"/> 90 day <input type="checkbox"/> April <input type="checkbox"/> August <input type="checkbox"/> December
Date:	Time with UNTHSC:	Reviewer:	

Cross Training and Educational Interests Committees/ Awards/ Volunteer Hours

HSC Always Goal	Department Action Plan	Individual Goal	Measure	Resource Needed	Action Steps / Plan

Team Member Personal Goals: Career / Personal / Educational / Organizational	Progress	Timeline	Resource Needed	Action Steps / Plan

Values	Accomplishments, Contributions, Strengths	Growth Opportunities
Serve Others First		
Integrity		
Respect		
Collaboration		
Be Visionary		

Team Member Signature / Date	Reviewer Signature / Date

Talent Management

System Human Resources

3500 Camp Bowie Blvd.

Fort Worth, TX 76107

Email: talentmanagement@untsystem.edu

UNT | SYSTEM

Human Resources

Dallas-Denton-Fort Worth

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