

Coaching Checklist

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|--|--|
| The seating arrangements were helpful to open discussion | |
| I began the session with an open and friendly greeting. | |
| I outlined how the session might proceed, without setting an agenda. | |
| We established the current situation at the outset. | |
| We established what the client wanted to achieve | |
| By mutual agreement, we established coaching objectives. | |
| I facilitated the generation of a range of options and ideas. | |
| I helped the client determine what he/she thought was the best option. | |
| I shared any assumptions I might have had with the client. | |
| I used a wide range of open questions. | |
| I tried to use closed questions only when it seemed appropriate. | |
| I listened actively to what was being said. | |
| I talked far less than the client. | |
| I avoided giving too much advice or saying 'If I were you...' | |
| I was not uncomfortable with silences or pauses. | |
| I disclosed some of my personal experiences as a means of building rapport. | |
| I took notes on key points. | |
| I summarized key points. | |
| I tried to make positive eye contact – not staring and not looking away when the other person looked at me. | |
| I tried to assure that my non-verbal / visual communication was positive. | |
| I matched the other person's body language to build rapport. | |
| I tried to be conscious of changes in the client's mood and manner. | |
| If any difficult situations arose, I responded to them calmly | |
| I gave positive feedback. | |
| I tried not to be judgmental. | |
| I tried to address negativity directly and overcame potential problems. | |
| I avoided stereotyping. | |
| In our discussions, I focused on future opportunities. | |
| I checked that the client could access any resources needed. | |
| Together we identified potential barriers or obstacles to subsequent achievements and developed strategies to overcome these barriers. | |
| A starting date for the coaching interaction was set. | |
| We agreed on dates for reviewing progress. | |
| We determined that the client has the necessary authority to manage his/her progress. | |

Coaching Evaluation Form

1 = low 5 = high

A. How good was your Coach at...

- | | | |
|---|---|-----------|
| 1 | Keeping agreed appointments | 1 2 3 4 5 |
| 2 | Allowing you to set the agenda for your sessions | 1 2 3 4 5 |
| 3 | Keeping a check on the points agreed during your sessions and feeding these back to you including reviewing points from previous sessions | 1 2 3 4 5 |
| 4 | Encouraging you to use a log or reflection note to reflect on learning experiences | 1 2 3 4 5 |
| 5 | Sharing experiences and ideas as options for you to consider | 1 2 3 4 5 |

B. How well did your Coach...

- | | | |
|---|---|-----------|
| 6 | Establish rapport with you – listening to what you said and displaying empathy with your thoughts and ideas, giving clear responses and summaries, communicating openly with you etc. | 1 2 3 4 5 |
| 7 | Explain clearly any necessary concepts, information and techniques giving clear, concise and constructive feedback | 1 2 3 4 5 |
| 8 | Use questionnaires and/or self-assessment profiles (if appropriate) to help you understand yourself better | 1 2 3 4 5 |
| 9 | Ensure you retained responsibility to solve problems and change your behavior gaining your commitment to a Personal Action Plan | 1 2 3 4 5 |

C. How good was your Coach at...

- | | | |
|----|--|-----------|
| 10 | Asserting him/herself without being aggressive or passive | 1 2 3 4 5 |
| 11 | Showing that he/she was knowledgeable, skillful and willing to liaise with other appropriate experts | 1 2 3 4 5 |
| 12 | Demonstrating good time management practices | 1 2 3 4 5 |
| 13 | Communicating a genuine belief in the potential for people to improve their performance | 1 2 3 4 5 |
| 14 | Managing your emotions | 1 2 3 4 5 |
| 15 | Acting as a good role model | 1 2 3 4 5 |

COACHING QUESTIONS

GOAL

- What's important to you when it comes to [theme]?
- What will reaching the goal give you?
- What do you want to achieve in [theme]?
- How will you know you've reached your goal?
- How will you know the problem has been solved?

REALITY

- What's happening to you now?
- What, when, with whom and how often?
- What is the result of that?
- Why is this theme a problem?
- What are concrete examples of this problem?
- What's been going wrong so far?
- How do you manage to fail? Teach me how to do it.
- What went well?
- Is this always a problem or are there situations in which it isn't?
- What are the defining factors? What can make the difference?
- What have you done so far?

OBSTACLES

- What prevents you from achieving your goal?
- What else could be preventing you?
- What personal changes do you think you would you have to make to achieve your goal?
- What is hindering you from changing?
- Do any of your direct or indirect behaviors, attitudes, competencies, skills etc. contribute to or help to maintain the situation?

OPTIONS

- What alternatives are there to that approach?
- Who might be able to help you?
- Would you like me to make suggestions?
- Can you identify the pros and cons for that option?
- Do you have a preferred option you'd like to act on?

WAY FORWARD

- What exactly will you do to reach your goal, and when?
- Which of these options will you take?
- What concrete step can you take NOW?
- What steps come after?
- Are all obstacles taken into account?
- How will you overcome your obstacles?
- How motivated are you, on a scale from 1 to 10, to go for this option?
- What do you need to have a 10? Where can you get it?
- How can your surroundings support you?
- Will this plan get you to your goal?
- Will it solve the underlying problem, too?

COACHING SESSION

This template is designed to help you record the progress made by the Coachee between each session. It helps you to focus on the agenda set by the coachee during each session and to record the actions they have committed to in that meeting.

COACHEE GOAL:

**SESSION
No. OF**

DEADLINE:

COACHEE:

COACH:

SESSION DATE:

PAGE OF

COACHEE IDEAS & THOUGHTS ON ISSUE

POTENTIAL SOLUTIONS

REQUIRED ACTIONS

DEADLINE

GROW COACHING MODEL – OBSERVATORY

This checklist enables you to record the coaching process using the GROW model. It helps you to monitor progress and keeps a record of the goal and commitments the coachee has made.

Please make notes in appropriate box, what do you observe in session within each stage on coach and coachee side.

| GROW Model Stage | Coachee | Coach |
|---|---------|-------|
| <p>Goal - is the end point that the coachee wants to achieve. The goal must be SMART so that the individual knows when it is attained.</p> | | |
| <p>Reality - is where the coachee is now. This requires the current issues and the challenges to be stated. Then an assessment of how far the coachee is away from their goal can be made.</p> | | |
| <p>Obstacles/Options – first the obstacles stopping the coachee attain their goal need to identified. (Without any obstacles the goal has already been attained!). Then the coachee needs to come up with different 'options', ways to deal with them.</p> | | |
| <p>Way forward – once the coachee has defined their options they can then devise the necessary action steps required to meet their goal.</p> | | |

Guide for a Coaching Session

The framework below includes open questions that might be helpful in facilitating each coaching session

Plan

What I would like to achieve by the end of this coaching session.

Some possible objectives of this session might be...

Discussion Options

- What do you know/do about (the issues or topic)?
- What experience have you had that relates to this issue or topic?
- What ideas can you think of?
- What options do you think might be available?
- What do you think will be challenging?
- What are the advantages and disadvantages of each option?

Possible Actions

- What do you think is the best option and why?
- What are the advantages?
- What might be the consequences of this choice?
- What support do you need from me? From others?
- What authority will you need?

Session Summary

- What have we agreed in this session?
- How does that help us to meet the objectives for this assignment or session?
- What are the next steps that we should take?
- When shall we meet again?

OSKAR COACHING MODEL TEMPLATE

This checklist enables you to record the coaching process using the OSKAR model. It is a solution-focused coaching model that focus's the coachee's attention on finding solutions rather than looking at how to address problems. Instead of discussing difficulties and their causes the coaching sessions explore and define what currently works and doing more of it, not keep on doing what isn't working.

Using this coaching model each session explores:

- Desired goals,
- Exceptions that have led to success in the past (times when the problem did not occur), and
- Solutions (the changes that will have occurred once the goal is reached) as well as existing resources.

| OSKAR Model Stage | Coachee Notes |
|---|---------------|
| <p>OUTCOME – is the difference that the coachee (and those around them) wants to see as a result of the coaching.</p> <p>This establishes a 'platform' from which to coach. It clarifies what the coachee wants to achieve, how they will know it has been useful to them.</p> <p>You ask the coachee to describe the perfect scenario that has miraculously appeared overnight and the problems vanished.</p> | |
| <p>SCALING – you ask the coachee to assign a scale number to the current situation between 0-10.</p> <ul style="list-style-type: none"> • 10 = the Outcome • 0 = the complete opposite <p>This enables you and the coachee to assess the extent to which the current situation is working.</p> | |

| OSKAR Model Stage | Coachee Notes |
|---|---------------|
| <p>Know-How & Resources – requires a scale number to be identified for the current situation using the scale 0-10.</p> <p>This enables you and the coachee to establish what factors are already contributing to getting the situation incrementally closer to the outcome.</p> <p>It also looks at the level & skill of the resources needed to attain the desired outcome.</p> | |
| <p>Affirm – is the first of the two-parts of the 'A' in this model.</p> <p>This first part providing positive reinforcement to the coachee by reflecting back positive comments about the key strengths they have revealed.</p> <p>This is reflected in terms of their</p> <ul style="list-style-type: none">• Knowledge,• Skills• Attitudes. | |

| OSKAR Model Stage | Coachee Notes |
|--|---------------|
| <p>Action – is the second of the two-parts of the ‘A’ in this model.</p> <p>This part involves helping your coachee determine what actions they will take to keep moving toward the outcome.</p> <p>This means doing more of the things that have already been recognized as working rather than anything new or different.</p> | |
| <p>Review - involves reviewing the progress made at each session.</p> <p>As coach you need to ask about ‘<i>What is better?</i>’ rather than whether a particular action was carried out, or what happened.</p> <p>This keeps the focus on the things that are moving things in the right direction.</p> | |
| <p>NOTE: Make the least change to make the greatest results.</p> | |