

Conducting an Effective 1st Coaching Session for Staff Members

Prepared by REDMA for Session 1 (Advanced Group)

This initial meeting is one of the most important conversations you will have with your coachee. Take time to get to know the issues that the coaching sessions are going to be based on, both in the short and long term. To be an effective coach during this session, two (2) key tasks are important:

1. **Preparation** before the meeting
2. Asking **incisive relevant questions** to learn more about the coachee and then **draw a coaching plan** in close collaboration with your coachee.

Preparation

What is your agenda for a coaching relationship? Is there a specific performance issue you want to address with the staff member? An opportunity you want to prepare him/her for? It's best to clarify your expectations ahead of time so that you're ready to support the goals that you and your staff member identify together in your first meeting. The more clearly you understand your own expectations, the better you will be able to align your goals for this process with his/her goals.

Make sure your coachee understands both the goals and the format of your time together. It is important for the coachee to know what to expect from the session. State clearly the purpose of the meeting emphasizing that the coaching sessions are for growth and not to give direction or instructions or to assign new work. Also mention that the session is not part of the formal review process.

Also, before the meeting think of the staff member in totality. For example, what is he/she good at? What does he/she like to do? What matters to him/her? What motivates him/her to perform? How does he/she add value in the organization? What do his/her work relationships look like? Etc.

Asking Incisive Relevant Questions

To help your staff member make the most of his/her strengths and improve on his/her weaknesses, you need to get to know him/her as a whole person. Use this structured interview to take a comprehensive "personal history of work" during your first coaching session.

Before you start, help him/her feel comfortable and safe by reiterating the purpose of this discussion: to develop together a coaching plan tailored to their particular experiences, issues and goals.

Use the opening script to begin the meeting, and then dive into the questions. Your role here is to listen. Take notes. Ask clarifying questions, if necessary, but do so in moderation, and try to frame questions so that the interview doesn't feel like an interrogation.

Opening Script (Drawn from Harvard Coaching Skills Programme):

‘Since we are both just starting the coaching process, I want to begin by learning more about how you see your work—what you like, what you want, how you’re looking to grow.

“As you know, this isn’t part of a formal evaluation process. The point of these conversations is to create an informal space where we can set goals and problem-solve together. My aim right now is to get to know you better as an employee and a person, so that I can make this experience useful to you. “It’s my hope that we can talk pretty frankly, and that you’ll tell me what you really think about these topics. I’m mostly going to be listening, though I’ll probably ask some clarifying questions.

“Do you have any questions for me before we start?”

The following questions can act as a guide – Add others you feel are relevant.

- What are your top five skills (i.e., those in which you have the most proficiency and/or those you enjoy using the most)?
- What do you believe are the top two or three skills you need to learn to grow in your job, advance to the next level, or seek a new job?
- What are your key transferrable skills—the skills that are not just job-specific but that can be applied to work in many positions (i.e., negotiation, financial analysis, collaboration
- Do you think you are currently performing to your potential? Why or why not?
- I notice that you have not been doing The consequences of this has been..... Tell me what is going on and what seem to hinder you from.....

Agree on a coaching plan with the coachee not only for this session but also the subsequent ones.

- Do you know people inside and outside the organization who are aware of your strengths and aspirations and can help you achieve your goals?

Once you are satisfied you have collected enough information, you can then together with your coachee draw a coaching plan for the entire period of coaching.

At the minimum you must come up with a coaching plan covering:

- Skills or competency that need to be developed (goals and realistic analysis of the situation)
- Options available to deal with the situation or skills development
- What success will look like and the impact it will have on the staff member and unit/department/organization
- Follow up from manager or colleagues to ensure progress (accountability mechanisms)

Remember, during this time, your full engagement sends a powerful message about how seriously you take this work. Remember also to use your Coaching Mindset throughout the discussion.