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WHITEPAPER

Coaching in action:

how managers are using coaching
to improve performance.

BY JILL PROUD



As you all know our focus at Third Factor is to deliver effective training to our clients. Effective training means our participants improve their performance as a result of participating in one of our programs. Many clients contract us to do follow-up work with participants after the initial workshop. It is during these calls—as people relay stories back to us of how they implemented their learning and how they achieved the goal they set in the workshop—that we see the effectiveness of what we are teaching.

Below are four examples from individuals with whom I have followed up after a workshop. The best results come from managers who focus their efforts on one key area that will make a real difference for them and/or their team. I hope you enjoy their stories and find some inspiration for tackling your next coaching challenge.

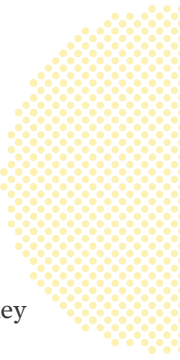
STORY #1: COACHING COMPETENCE

When coaching to build competence in an employee managers need to focus simultaneously on two areas: building skill and developing confidence.


One organization we work with has a sales team that is responsible for selling a complex product to very large clients. Recently, amalgamations, centralized budgeting and new regulations have made their sales process much more challenging. One of the company's managers talked to me about how the strategy she had been using with a particular salesperson had not been working. After going through the competence section of our workshop she realized that her own assumptions were getting in the way.

The individual in question, who was new to their team, was a longtime salesperson with a strong track record as a high performer. However, the complexity of the product and the changing client environment were new to him. This salesperson, who had a solid record of consistently achieving targets, was falling short—and his confidence was suffering as a result. The manager noticed that the salesperson appeared engaged and motivated when the manager initiated a conversation, but at all other times did not appear to be proactive, avoided the topic and resisted offers of support. The employee believed he should be able do it all on his own.

At the workshop the manager decided to focus on building competence in this employee—in the areas of both skill and confidence. She began by breaking down the sales process for the product into four key areas. After reviewing all of the associated sales activities it was clear that the salesperson was doing all of the right activities. By looking together at the



potential blocks to making the sale it became apparent that other factors were at play: timing, client contracts and other blocks that were out of the employee's and the company's control. Through these discussions the manager was able to reinforce and recognize the employee's progress—a key to confidence—even though he was not yet hitting his targets.



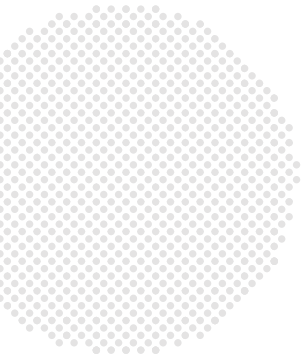
As trust built in the relationship the manager was able to help expand the salesperson's thinking about what else he could be doing to drive the sale. The impact was significant and immediate. The employee began pro-actively calling the manager on a weekly basis to discuss progress and ask for help to leverage the contacts and credibility of the manager in key sales meetings. He also started making more sales calls and made significant headway into a key client with potential for a major sale.

The lesson for those of us who coach is: don't assume competence. Even when someone has a history as a strong performer there may be many factors that contribute to scenarios where their skill and/or confidence needs to be strengthened.

STORY #2: CONFRONTING

One supervisor who has a particularly challenging team found that she was often putting her credibility at risk by having confrontational conversations where she was delivering third-party feedback. After the workshop she set a new expectation across that team. When a staff member needed to provide feedback about another staff member she arranged a meeting between them so they could deliver the feedback directly to each other. She is thrilled with the outcome. It has meant she spends less time managing conflict because staff are dealing directly with each other. It is also less stressful because the feedback is being given by the source, and the supervisor's role is to help facilitate a resolution. A third outcome is that “the feedback is less petty.” People are restricting their feedback to those issues that really matter.

STORY #3: CLARITY OF EXPECTATIONS



A leader reaches an important turning point when he or she realizes that what appeared to be a clear and good idea somehow got lost in the translation to the employees. Sometimes, as coaches we think we are communicating clearly, yet the behaviour of individuals or the team is telling us something else. Many managers feel they have to define and provide all the solutions to any problem or situation. However, there are two major downsides to this concept: 1) it puts pressure on the manager to constantly



come up with creative solutions to every problem and 2) active listening and empowering the person or team to develop their own solutions is almost always far more effective and provides even greater clarity around expectation.

One manager I spoke with recently was dealing with a major negative change in his team's environment. The team consisted of two groups: individuals whose primary focus was on sales and those who were primarily service-oriented. Due to a newly mandated expectation that service people would start selling certain products the team dynamics shifted. The service people were now in direct "competition" with the salespeople and, because a portion of their time was now being dedicated to sales, the sales people had to do more of the service activities. The impact, from both the manager's observations and the employee engagement survey, was a lowering of trust within the team. Conflict over client files and an overall negatively charged atmosphere meant commitment was down.

At our coaching workshop the manager built an action plan that focused on building shared clarity among the team. While the newly defined roles looked good on paper the challenge was in making the change work in the day-to-day environment. The manager held a team meeting where the employees were divided into two heterogeneous teams—each with people from sales and service. Both teams had the same assignment: get clarity about roles and responsibilities within the new framework. The manager provided a powerful coaching tool from our program—called the GROW—that consists of a formal set of questions to help both teams think through the challenge and develop a set of recommendations. When each team presented their findings they realized that there was a high degree of alignment. They then developed a common action plan and came to agreement on key issues. For example, the service people agreed to shift their focus exclusively to service when the store traffic was high and to pass on all sales opportunities to the sales representatives. The result: morale improved, trust increased and productivity went up.

The power of a consultative approach when coaching—asking effective questions and listening to the answers—is that it takes the pressure off you as the coach to fix the problem and gives ownership to the team for developing a shared solution. Rather than fighting an uphill battle to convince the team that the change in roles is good for everyone, the coach's job is now much easier: hold the team accountable to their solution and recognize the efforts of everyone as they embrace the new behaviours and attitudes that they themselves have defined.

STORY #4: A MENTORING STYLE OF COACHING

Over the past few years, many organizations have recognized the importance of retaining talent by growing from within. The dilemma leaders face is how to actually create an environment where employees are challenged to grow and have the opportunity to stretch in new ways. As one manager in one of my workshops recently found, mentoring is an excellent way to introduce people to increasingly challenging roles and responsibilities.

To begin, the manager helped an employee break down the job description of a position to which this person aspired. After breaking down the tasks, they identified the types of activities the successful applicant would need to be able to perform. The manager then provided the employee with an opportunity for hands-on responsibility in two areas that would be required for the position: writing reports and conducting month-end activities. Recently a new position has been posted and, to further the mentoring process, the manager is currently coaching the employee for the interview through role-playing.

To the manager the benefits are clear: “The improvement is amazing in only three months. The time with this employee has been very well spent, and it took less of a time investment than I thought!” What she has noticed is the significant increase in confidence for both the employee and for herself as a coach. The manager also reported that what she has learned has made a difference in how she approaches others. “The coaching and learning has changed who I am.” She’s not the only one who has seen a difference; her senior manager has commented on at least two new behaviours she has observed: more patience during employee interactions and the asking of more questions.

IN SUMMARY

When I speak with people three months after a workshop, I am always impressed with examples such as those above. Key characteristics of effective managers—conscientiousness, the desire to improve, the will to make different choices, the sense of responsibility for outcomes, compassion for people caught in complex situations and mis-communications—are all activated and reinforced through good training. We are very pleased to be a part of that process. Ultimately, we all want to work in environments that allow us to get along with each other, get results and grow. Good coaching allows all of that to happen.

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