



TPG | TELEMANAGEMENT, INC.

@HOME
series

Course #3: Refining our Coaching
Approach in This New Environment



ADAM MOHR
TPG Strategic Solutions



SARAH PERCIVAL
TPG Strategic Solutions



VICKI CUNNINGHAM
TPG Strategic Solutions



Are you ready
for remote coaching?



PRINCIPLE 4: CULTURAL INTEGRATION

4

COURSE 4: *Making sure the work matters... Moving the needle*



PRINCIPLE 1: CULTURAL ASSESSMENT

1

COURSE 1: *Ensuring your remote communications are set up for success*



PRINCIPLE 5: HITTING THE TARGET

5

COURSE 5: *Using the tools to tie it all together easily*



PRINCIPLE 3: ADOPT COACHING CULTURE

3

COURSE 3: *Refining our coaching approach in this new environment*



PRINCIPLE 2: DEPLOY COACHING STRATEGY

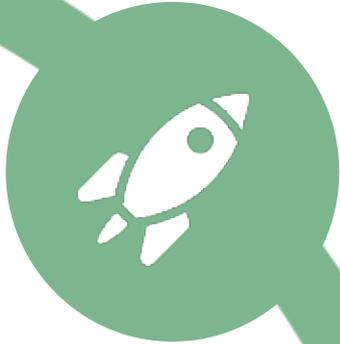
2

COURSE 2: *Keeping your employees engaged and fully plugged in*





PRINCIPLE 1: CULTURAL ASSESSMENT



1

COURSE 1: *Ensuring your remote communications are set up for success*



PRINCIPLE 2: DEPLOY COACHING STRATEGY

2

COURSE 2: *Keeping your employees engaged and fully plugged in*



PRINCIPLE 3: ADOPT COACHING CULTURE

3

COURSE 3: *Refining our coaching approach in this new environment*





ADOPTING A COACHING CULTURE

DIAGNOSE



EDUCATION



GOAL SETTING



FEEDBACK



TACTICS TO ENSURE YOU'RE SET UP FOR SUCCESS



HIGH LEVERAGE Tactics

Call Listening
Employee Evaluation
Goal Setting
Role Playing



SUPPORT Tactics

Behavioral Education
Business Process Education
Group Training
Job Aid
Training Handouts



ADVANCED Tactics

Action Learning
Gamification
Job Rotation
Stretch Assignments



FOUNDATIONAL Tactics

Feedback

Mentoring
One-on-One Training

Peer Support
Positive Reinforcement



EMPLOYEE EVALUATION

WHAT IS IT?

Review performance against KPI's, objective outcome measures, behavior performance, skill proficiency, etc...

STEPS TO DO IT

KPI's should provide ideal performance insight
Use stack-ranking to vet individual progress
Send clearly outlined meeting notes

DELIVERING REMOTELY

Video conferencing is ideal to pick up on body language and to share screens when communicating specific data/performance results



TIPS + TRICKS

When giving feedback:

Be Specific
Describe the impact /
Clarify the Importance
Confirm Understanding
Open Dialogue for discussion

GOAL SETTING

WHAT IS IT?

Designating a defined outcome measure not currently being achieved by the employee and setting a target and date for achievement.

STEPS TO DO IT

Ask yourself these 5 questions in regard to your goal:

Is it well-defined?

Is it measurable?

Is it achievable?

Is it relevant?

Is the deadline realistic?

DELIVERING REMOTELY

You definitely want to require video if at all possible for goal setting interactions.

TIPS + TRICKS

Goal Alignment is KEY
(Eliminate conflict between company
and personal goals)

Define how your employee's goal
will help achieve the team/company
target

Goals should be Narrow and Specific

ROLE PLAYING

WHAT IS IT?

When two people act out a previous interaction in a simulated scenario

STEPS TO DO IT

Script out the dialogue or spell out talking points for each character.

You'll need to "set the stage" before actually facilitating

DELIVERING REMOTELY

As long as you have a video connection, role plays are a viable and impactful coaching technique.



TIPS + TRICKS

Know your purpose

What do you want those participating and/or spectating to learn and/or empathize with?

Choose your participants wisely

Know who is talkative, combative, submissive, etc... WHO is roleplaying is just as important as the role play itself.

CALL LISTENING REVIEW

WHAT IS IT?

Playing a call for an employee to hear. They are leveraged to bring performance trends to life through real world examples.

STEPS TO DO IT

Identify one "best in class" example along with a call on the opposite end of the performance spectrum.

DELIVERING REMOTELY

Ensure you are able to listen to the call simultaneously
As with previous techniques, video participation is encouraged, but voice only can still be effective.

TIPS + TRICKS

Ask the employee what they heard on the call – What was good? Where was the opportunity?

Ask the employee to self-reflect based on their answers and share how they think they do

TACTICS TO ENSURE YOU'RE SET UP FOR SUCCESS



HIGH LEVERAGE Tactics

Call Listening
Employee Evaluation
Goal Setting
Role Playing



SUPPORT Tactics

Behavioral Education
Business Process Education
Group Training
Job Aid
Training Handouts



ADVANCED Tactics

Action Learning
Gamification
Job Rotation
Stretch Assignments



FOUNDATIONAL Tactics

Feedback

Mentoring
One-on-One Training

Peer Support
Positive Reinforcement



HITTING THE TARGET

TACTICS

NEED

A

TARGET

PROCESS



1. Select the outcome you want to measure using your balanced scorecard.
2. Decide what pertinent information needs coached.
3. Select a tactic.
4. Coach using the identified information.





PRINCIPLE 4: CULTURAL INTEGRATION

4

COURSE 4: *Making sure the work matters... Moving the needle*





**Thursday May 14th at 11:30amEST:
Course #4: Making sure the work matters...Moving the needle.**

**Thursday May 21st at 11:30amEST:
Course #5: Using the tools to tie it all together easily.**



BEHAVIORAL EDUCATION

WHAT IS IT?

Education of behaviors begins with the supervisor defining acceptable behavior, when it is applicable, and explanation of how to display the behavior to meet the goal.

STEPS TO DO IT

Identify if it is a consistency or proficiency issue, then create and communicate an outline of steps for the employee on how to display the behavior.

DELIVERING REMOTELY

Video participation should be encouraged if not mandated for these sessions since it encourages more 1:1 interaction.



TIPS + TRICKS

Share examples of what the behavior
is not

Don't confound behaviors with
attitude or skill

Align on the meaning of the behavior
before coaching to it

Share importance/impact of the
behavior



BUSINESS PROCESS EDUCATION

WHAT IS IT?

A collection of linked tasks that add value to an internal or external customer. It involves providing step-by-step instruction on how to perform the defined set of activities and tasks to appropriately meet the goal.

STEPS TO DO IT

After a process problem is identified that customers may face, they can introduce the solution or steps to provide value/resolution to the customer.

DELIVERING REMOTELY

Ideally it would include video to gauge employee engagement. The facilitator should encourage participation by using the voting buttons and the chat features. Soliciting feedback is a great real-time barometer to measure information retention.

TIPS + TRICKS

- Be as clear and precise as you can about the process
- Use demonstration or hands-on instruction, not lecture
- Follow up with group discussion to reinforce information given



GROUP TRAINING

WHAT IS IT?

Giving education/information to a collective of 5 or more people in one session or over a series of meetings

STEPS TO DO IT

Identify your objective(s), select the most important information and the most appropriate way of delivering the information. Set a time and duration for the training.

DELIVERING REMOTELY

Video conferencing is great to have so you can “read the room” and leverage media and visuals to accompany the information that you provide.

TIPS + TRICKS

Have a clear objective with the training

Consider your audience

Keep lecture short

Check for understanding frequently

Provide next steps

Follow-up

JOB AID

WHAT IS IT?

A job aid is a one-page document that highlights the key attributes of a subject. It usually has a stated objective and examples to support the change. It is a very visual reminder of information already acquired.

STEPS TO DO IT

Summarize as clearly and succinctly the information previously presented about the subject. Consider the readability of it when being used in a glance.

DELIVERING REMOTELY

Via email with an explanation is okay, but more effective when delivered after a webinar.

TIPS + TRICKS

Don't deliver without an explanation

Use as little text as you can

Refer to it so employees do too



TRAINING HANDOUTS

WHAT IS IT?

A document that summarizes the most important points of a presentation or training that can serve as a reference or reinforcement of prior learning.

STEPS TO DO IT

Summarize the information previously presented about the subject. Provide during a presentation or after so the person can add to it as needed. Consider adding important points that were only verbalized in the presentation.

DELIVERING REMOTELY

Via email with an explanation is okay, but more effective when delivered during or immediately following a webinar.



TIPS + TRICKS

Provide space for note taking
Make the format mirror the
information presented
Use color and visuals



ACTION LEARNING

WHAT IS IT?

Experiential learning such as special or temporary duties, or external volunteer assignments.

STEPS TO DO IT

Collaborate with employees to determine potential action learning opportunities. If possible, not force employees to participate, but explain and encourage why it would be beneficial. Reflect and share after the experience has concluded.

DELIVERING REMOTELY

Initial communication about the opportunity can be done in a meeting (with/without video) or via email. Conclude the experience with a video chat.

TIPS + TRICKS

Can be viewed similar to a “book club”

Follow up after the experience

Play to the interest of the collective group

Use it sparingly to keep engagement high

Determine an end date



GAMIFICATION

WHAT IS IT?

The act of designing a game-like structure around an existing initiative or one that is soon to be launched.

STEPS TO DO IT

Clearly outline the structure and duration of the game. Identify and communicate rules of how to participate, and what the benefits are to participating (i.e. prizes). Post or communicate progress of participants during the gamified activity.

DELIVERING REMOTELY

Video conferencing is ideal to introduce the gamified activity and to explain the rules. Email will be fine in most cases for keeping participants aware of progress during the activity. A wrap-up at the end using video is great to reinforce/reflect on the experience.

TIPS + TRICKS

- Be very clear with objectives
- Allow participants to ask questions
- Keep the duration relatively short and/or the pace of play fast
- Don't overuse this tactic
- Make it optional, if possible

JOB ROTATION

WHAT IS IT?

When personnel are moved within the same department to expose them to different leadership styles while sometimes adjusting job duties in the process.

STEPS TO DO IT

List all jobs within a department/functional areas across an organization. Next, identify what an employee would take away from serving in each job and estimate a sufficient duration. Then, determine a job rotation strategy and define all of the moving parts and timeline. Communicate to employees the plan and what to expect. Launch the job rotation strategy and evaluate continuously.

DELIVERING REMOTELY

Video conferencing is ideal to pick up on body language and to share screens when communicating specific data/performance results

TIPS + TRICKS

Involve Team Leads when forming strategy

Can be beneficial for new hires

Have clear processes and roles

Communicate objectives/take-aways for each job



STRETCH ASSIGNMENTS

WHAT IS IT?

Temporary assignments, employee exchange, external volunteer assignments or adding challenges or new responsibility to the employee's current job.

STEPS TO DO IT

Collaborate with the employee to determine possible stretch assignments. Do not force an employee to agree to this tactic, but explain and encourage why it would be beneficial.

DELIVERING REMOTELY

Having regular check-ins with video and an open line of email/verbal communication in between will support remote delivery.



TIPS + TRICKS

Be clear in what the process is
Communicate frequently throughout
Provide options for stretch work
Build consensus

FEEDBACK

WHAT IS IT?

Information shared with another person in order to make the employee more successful.

STEPS TO DO IT

Identify a focused and clear piece of information that you want to convey. Set a time that you can speak with the employee. Be prepared and specific when you speak. Ask for their feelings about the feedback and allow the employee to react and absorb what is being shared.

DELIVERING REMOTELY

Video conferencing is ideal to pick up on body language and to be able to fully convey your message.

TIPS + TRICKS

When giving feedback:

Be Specific
Describe the impact /
Clarify the Importance
Confirm Understanding
Open Dialogue for discussion



MENTORING

WHAT IS IT?

A more experienced employee provides guidance and serves as non-evaluative resource for a newer employee.

STEPS TO DO IT

Identify willing Mentors who can be an unbiased and helpful resource for new employees, pair them with a Mentee, and provide time that they can communicate regularly.

DELIVERING REMOTELY

Having regular check-ins with video and an open line of email/verbal communication in between will support remote delivery.



TIPS + TRICKS

Have support for topics and ways

Mentors can help the Mentees

Consider communication styles and
personality compatibility

Provide a calendar of
activities/meetings for the program



ONE-ON-ONE TRAINING

WHAT IS IT?

An interaction where the employee is the learner and receiving direct instruction from another person.

STEPS TO DO IT

Identify your objective(s), select the most important information and the most appropriate way of delivering the information. Set a time and duration for the training. Tailor the information to the employee.

DELIVERING REMOTELY

Video conferencing is great to have so you can create that sense of 1:1 interaction and leverage media and visuals to accompany the information that you provide.

TIPS + TRICKS

Have a clear objective with the training

Tailor your information

Keep lecture short

Check for understanding frequently

Provide next steps

Follow-up



PEER SUPPORT

WHAT IS IT?

A regular interaction with a peer (not necessarily a mentor) who can answer questions and provide help to the employee to feel fully integrated in to the culture of your organization.

STEPS TO DO IT

Identify willing peers who can be a patient and helpful resource for new employees and provide time that they can communicate regularly.

DELIVERING REMOTELY

Having regular (even if brief) check-ins with video and an open line of email/verbal communication in between will support remote delivery.

TIPS + TRICKS

Make it clear what role the peer plays

Allow the peer to keep discussions confidential

Consider communication styles and personality compatibility

Provide a cadence of how frequently peers check in with each other



POSITIVE REINFORCEMENT

WHAT IS IT?

Act of recognizing/rewarding an employee for performing well in some measurable facet relating to their position or the company overall.

STEPS TO DO IT

Identify what you want to reinforce, respond in a timely manner and with consistency, continue to reinforce. If you cannot praise someone, it is time to have an open 1:1 dialogue.

DELIVERING REMOTELY

It is more important to understand how the employee prefers to receive praise: a note? Verbally? In a public, or private forum? Adapt how you can give praise to using video or a phone call.



TIPS + TRICKS

When giving praise:

Be Specific

Describe the impact

**Try to give positive reinforcement
to everyone on the team**