A “Can’t Miss” Model for Coaching

Putting a Framework behind the Soft Stuff

Sheryl Vogt, Vogt Consulting

Maria Fry, Strategic Quality Solutions

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• Served over 2,000 corporate customers (including 50+% of the F500)
• First firm to offer the complete Black Belt curriculum online
• Courses reviewed and approved by ASQ and PMI
• Academic Partnerships with Ohio State University, Cal Poly and George Washington University
Today’s Program

• Welcome
• Introduction of MBB Webcast Series
  – Ellen Milnes, MoreSteam.com
• Presentation: Model for Coaching
  – Sheryl Vogt and Maria Fry
• Open Discussion and Questions
Today’s Presenters

Sheryl Vogt
Vogt Consulting

• Develops and delivers LSS programs and training for manufacturing, service, healthcare, and government organizations. Mentored hundreds of Black and Green Belts on their projects.
• Previously worked as a Black Belt and Master Black Belt for GE.
• B.S. in Mechanical Engineering and M.S. in Industrial Engineering – Purdue University.

Maria Fry
Strategic Quality Solutions

• Leads and supports Lean Six Sigma deployments of large, multinational firms. Trained and mentored hundreds of Belts at all levels.
• Started career with GE Aircraft Engines.
• B.S. in Mechanical Engineering from University of Notre Dame and M.B.A. from Cleveland State University.
Our Focus Today

• Layout a **simple plan** for setting up a coaching program (or improving the one you have)
  – Setting up the strategy for a coaching program

• Show how that plan translates to the **critical elements** that a coach needs to do in every session
  – Setting up the standard work for a coach
A Simple Plan: Strategic View

- Develop a plan (or improve your current plan) for setting up a coaching program.
  1) Define your purpose
  2) Decide on your approach
  3) Select good coaches
  4) Set clear expectations
  5) Use PDCA on the program
Step 1 – Define your Purpose

• **Decide** and agree upon your objective in a coaching program
  - Project progress
  - Emotional support
  - Project support
  - Some combination of the above

• **Communicate** the objective to your team so everyone knows why these sessions are set up
  - Create standard templates
  - Define clear expectations
  - Communicate schedule
  - Develop BB tools, soft skills, and relationships
Step 2 – Decide on Your Approach

- **One-on-One**
  - Individual attention, ability to work on specific project or goals, great for project progress

- **Small Study Halls**
  - More efficient than one on one, allow some team building and practice sharing

- **Large Study Halls**
  - Maximize MBB time, get the message across consistently, allow everyone access to your experts

- **Capstone Session**
  - Add team building for BB and tie everything together. (Methods, tools, theory, actual project work etc.)

* Don’t forget to determine whether onsite or remote for each.*
Step 3 - Select Good Coaches

- Decide what knowledge and skill set your coaches need.
- Match coaches’ personalities and styles to your participants.
- Limit ratio of coaches to participants if doing small group or one on one.
- Be clear on the kind of coaching or mentoring the program can provide.
Characteristics of a Good Coach

- Empathetic
- Versatile / Changes Style
- Consistent
- Well Versed in Change Management
- Practical Experience
- Grounded in Tools
- Communication Skills
- Respected in Organization
- Patient
- Firm when required
- Follow-up and Feedback
- Goal Directed

What We Heard When We Asked the Experts!
Step 4 – Set Clear Expectations

- Program Deliverables
  - Project expectations
  - Formality of tollgate reviews
  - Belt skill/tools expectations

- Guidelines for Interactions
  - How often
  - Type of interactions

- Certification Expectations
Step 5 – Use PDCA on the Program

• Do an initial check after the first two months
  ➢ Look for obvious red flags like missed meetings.

• After 6 months
  ➢ Check to see that you are achieving your objective in projects or skill transfer. Get feedback from mentors and participants.

• After 12 months
  ➢ Make sure it’s still working but re-evaluate based on new situations (expanding the program, expertise of the Belts etc.)
Strategic to Tactical
A Simple Plan: Tactical View

• Give your coaches a plan for running the session.

1) Define your purpose
2) Decide on your approach
3) Be a good coach
4) Set clear expectations
5) Use PDCA on the session
### Step 1: Purpose (Before Session)

- Progress Review
- Tool Teaching
- Tollgate Review
- Project StartUp
- Project Closure
- Other

List specific questions in Step 3:

### Step 2: Approach

**Agenda:**
- Greeting & Develop relationship: 5 min
- Agenda discussion (update approach): 5 min
- Show me what you have: 15 min
- Questions: 30 min
- Next steps & Expectations: 5 min

### Step 3: Be a Good Coach

**Overall notes:**
- Listen to their update first
- Take notes on status
- Ask questions don’t direct
- Encourage, Encourage, Encourage

**Red Flags Seen During Coaching:**
- Confusion on tools
- Nothing to show you
- No mention of team
- Lack of Plan
- No Sponsor/Champion involvement

### Step 4: Expectations

**Cover these together:**
- Set up next meeting/confirm schedule
- Agree on next steps
- Is/are setup to complete next steps
- How communicate notes and to do list
- How to reach me
- Any last questions

### Step 5: PDCA (After Session)

- Did we accomplish our goal?
- Did we establish or continue rapport?
- Was the feedback well received?
- Do I need to change my approach?
- Can I add different visual tools?
- What can I prepare for next time?

### Coaches Notes:

**Session 1:**

**Session 2:**

**Session 3:**

**Session 4:**

**Session 5:**

### Step 3: Questions Coaches Ask

**Generic questions for any situation:**
- What’s on your list today?
- How are things in your world?
- What does your team think?
- Have you consulted your Sponsor?

**Specific questions for today (from Step 1):**

1. 
2. 
3. 
4. 
5. 

More...
Step 1 – Define your Purpose

- **Consult** the schedule to pinpoint expected progress.
- **Decide** upon your goals for the coaching session.
- **Always:**
  - Develop BB skills
  - Develop relationship
  - Improve soft skills
Before the Session:
- Check off what you want to accomplish.
- Make a list of specific questions you want to ask during the session.
- Good coaches plan & prepare.
### Step 3: Questions Coaches Ask

**Generic questions for any situation:**
- What's on your list today?
- How are things in your world?
- What does your team think?
- Have you consulted your Sponsor?  

**Specific questions for today (from Step 1):**
1. What root causes did you investigate?
2. Which root causes proved to be significant?
3. What tools did you use to prove that?
4. How did you display/explain that to others?
5. What is the optimal setting for the causes?
Step 2 – Approach During the Session

Start of the Session:
- Ask what's on their list today?
- Update agenda, approach, & planned questions.
- Good coaches are flexible and responsive.

### Step 2: Approach

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<thead>
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<th>Time</th>
</tr>
</thead>
<tbody>
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Step 3- Be a Good Coach

- Listen *first*.
- Watch for Red Flags that belts or projects are struggling.
- Good coaches do more listening than talking.
Step 3- Be a Good Coach

- Planned questions are listed. Add others as needed.
- Consult tabs at bottom of template for additional questions.
- Good coaches don’t answer all the questions a Belt has but lead them to discover the answer themselves.
# Step 4: Set Expectations

## Items to do:

- Set up next meeting/Confirm schedule
- Agree on next steps
- Is Belt setup to complete next steps
- How communicate notes and to do list
- How to reach me
- Any last questions

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- Before session ends, complete this with the Belt.
- Failing to plan is planning to fail.
- Good coaches set and communicate goals to reduce rework and frustration.
Step 5- Use PDCA on the Session

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- After the session, don’t forget to evaluate **yourself**.
- Even small changes can make a big difference.
- Good coaches constantly work to improve themselves.
## A Coach’s Template

### Step 1: Purpose (Before Session)
- Progress Review
- Tool Teaching
- Tollgate Review
- Project StartUp
- Project Closure
- Other

**List specific questions in Step 3:**

### Step 2: Approach

**Agenda:**
- Greeting & Develop relationship
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- Show me what you have
- Questions
- Next steps & Expectations

### Step 3: Be a Good Coach

**Overall notes:**
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### Step 4: Expectations

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**Specific questions for today (from Step 1):**

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3.  
4.  
5.  

More...
Final Thoughts

• Good coaching requires planning at both the strategic and tactical level.

• This basic template is a good start for that plan.
  – You can customize for your organization to help the coaches and Belts.
  – Delivers a more consistent approach.
  – Can help you evaluate your coaches but also your adherence to a program.

• Commit to your coaches and belts and the results will follow.
Questions

Have you ever encountered ....

Would you explain more how you’ve approached ....

How have you handled ....

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Strategic Quality Solutions
Master Black Belt Program

• Offered in partnership with Fisher College of Business at The Ohio State University

• Employs a Blended Learning model with world-class instruction delivered in both the classroom and online

• Covers the MBB Body of Knowledge, topics ranging from advanced DOE to Leading Change to Finance for MBBs
Thank you for joining us

Questions? Comments about today’s program?

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Join us next month: May 29th – Kirby James – “Making Change Communication Personal”

Archived presentations and other materials: http://www.moresteam.com/presentations/
Appendix A - Questions Coaches Ask

- Why did you choose that? *in a nice tone of voice*
- What are next steps?
- How confident are you in that?
- What tools did you use?
- Is your project on track?
- Do you have any questions?
- What tools are you thinking about next?
- Do you see the path of the project clearly?
- How is your team dynamic?
Appendix B - Red Flags During Coaching

- Lack of a Plan
- Proceeding without Buy-In
- Blaming Others
- No Progress
- Confusion on Tools
- Lack of Documentation
- Team Issues
- Scope Creep
- No Champion/Sponsor Involvement
- No Sponsorship
- No Communication/Checked Out
- Frustration