

A “Can’t Miss” Model for Coaching

Putting a Framework behind the Soft Stuff



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Maria Fry, Strategic Quality Solutions
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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, multi-national 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

Grounded
in Tools

Practical
Experience

Patient

Firm when
required

Communication
Skills

Follow-up and
Feedback

Goal
Directed

Respected in
Organization

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



A Coach's Template

| | | |
|---|---|--|
| <p>Step 1: Purpose (Before Session)</p> <p>Progress Review <input type="checkbox"/></p> <p>Tool Teaching <input type="checkbox"/></p> <p>Tollgate Review <input type="checkbox"/></p> <p>Project StartUp <input type="checkbox"/></p> <p>Project Closure <input type="checkbox"/></p> <p>Other <input type="checkbox"/></p> <p><i>List specific questions in Step 3:</i></p> | <p>Step 5: PDCA (After Session)</p> <p>Did we accomplish our goal? <input type="checkbox"/></p> <p>Did we establish or continue rapport? <input type="checkbox"/></p> <p>Was the feedback well received? <input type="checkbox"/></p> <p>Do I need to change my approach? <input type="checkbox"/></p> <p>Can I add different visual tools? <input type="checkbox"/></p> <p>What can I prepare for next time? <input type="checkbox"/></p> | <p>Coaches Notes:</p> <p>Session 1:</p> <p>Session 2:</p> <p>Session 3:</p> <p>Session 4:</p> <p>Session 5:</p> |
| <p>Step 2: Approach</p> <p>Agenda:</p> <p>Greeting & Develop relationship <input type="checkbox"/> 5 min</p> <p>Agenda discussion (update approach) <input type="checkbox"/> 5 min</p> <p>Show me what you have <input type="checkbox"/> 15 min</p> <p>Questions <input type="checkbox"/> 30 min</p> <p>Next steps & Expectations <input type="checkbox"/> 5 min</p> | <p>Step 4: Expectations</p> <p>Cover these together:</p> <p>Set up next meeting/Confirm schedule <input type="checkbox"/></p> <p>Agree on next steps <input type="checkbox"/></p> <p>Is Belt setup to complete next steps <input type="checkbox"/></p> <p>How communicate notes and to do list <input type="checkbox"/></p> <p>How to reach me <input type="checkbox"/></p> <p>Any last questions <input type="checkbox"/></p> | |
| <p>Step 3: Be a Good Coach</p> <p>Overall notes:</p> <p>Listen to their update first <input type="checkbox"/></p> <p>Take notes on status <input type="checkbox"/></p> <p>Ask questions don't direct <input type="checkbox"/></p> <p>Encourage, Encourage, Encourage <input type="checkbox"/></p> <p>Red Flags Seen During Coaching:</p> <p>Confusion on tools <input type="checkbox"/></p> <p>Nothing to show you <input type="checkbox"/></p> <p>No mention of team <input type="checkbox"/></p> <p>Lack of Plan <input type="checkbox"/></p> <p>No Sponsor/Champion involvement <input type="checkbox"/></p> <p><i>More....</i></p> | <p>Step 3: Questions Coaches Ask</p> <p>Generic questions for any situation:</p> <p>What's on your list today?</p> <p>How are things in your world?</p> <p>What does your team think?</p> <p>Have you consulted your Sponsor? <i>More</i></p> <p>Specific questions for today (from Step 1):</p> <p>1 _____</p> <p>2 _____</p> <p>3 _____</p> <p>4 _____</p> <p>5 _____</p> | |

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



Template: Purpose Section

| Step 1: Purpose (Before Session) | |
|---|--------------------------|
| Progress Review | <input type="checkbox"/> |
| Tool Teaching | <input type="checkbox"/> |
| Tollgate Review | <input type="checkbox"/> |
| Project StartUp | <input type="checkbox"/> |
| Project Closure | <input type="checkbox"/> |
| Other | <input type="checkbox"/> |

List specific questions in Step 3:

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.

Template: Purpose Section – Example

Analyze Tollgate Questions Added

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?

More

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

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 |

Start of the Session:

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

Step 3- Be a Good Coach

| Step 3: Be a Good Coach | |
|--|----------------------|
| Overall notes: | |
| Listen to their update first | <input type="text"/> |
| Take notes on status | <input type="text"/> |
| Ask questions don't direct | <input type="text"/> |
| Encourage, Encourage, Encourage | <input type="text"/> |
| Red Flags Seen During Coaching: | |
| Confusion on tools | <input type="text"/> |
| Nothing to show you | <input type="text"/> |
| No mention of team | <input type="text"/> |
| Lack of Plan | <input type="text"/> |
| No Sponsor/Champion involvement | <input type="text"/> |
| | <i>More....</i> |

- Listen *first*.
- Watch for Red Flags that belts or projects are struggling.
- Good coaches do more listening that talking.

Step 3- Be a Good Coach

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?

More

Specific questions for today (from Step 1):

1 _____

2 _____

3 _____

4 _____

5 _____

- 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

Step 4: 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

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?

| |
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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.

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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



Sheryl Vogt
Vogt Consulting

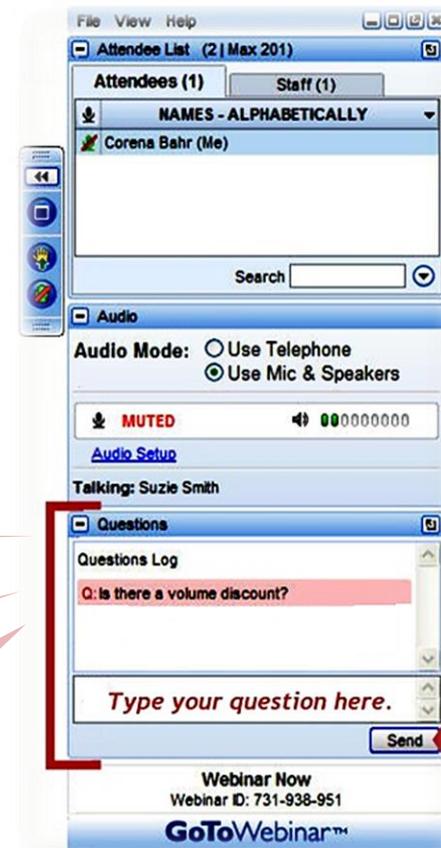


Maria Fry
Strategic Quality Solutions

How have you handled

*Have you ever
encountered*

*Would you explain more how
you've approached*



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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