

# Fundamentals Of Organizational Coaching

## Introduction

This program is designed for professionals, managers and leaders of all types. Its intention is to establish the foundation to unleash your ability to grow the capability of others. It is based on the experience, teaching and results of Coach Training Alliance's best-selling coach curriculum. The content of the program is designed to educate you about the Fundamentals of Organizational Coaching, introduce a structure for holding productive conversations, develop basic coaching skills and prepare you to apply coaching in your organization.

This is a core skill investment that will impact you personally and professionally as well as those you support- team members, colleagues, clients, partners... and so on. The curriculum is intentionally simple in its presentation- the art and mastery is in the application. Your task will be to integrate the lessons into your own leadership habits. Like most change, the learning will pose challenges but when integrated fully will have the potential to yield improved communication, increased capability, greater productivity and higher employee engagement.

*The intention of this program is to establish a foundation for what coaching is, how to introduce it to your organization and how to apply it in your role. We will explore simple skills you can immediately integrate into your leadership style to impact your organization.*

The Fundamentals of Organizational Coaching are based on the Certified Human Capital Coach Program and the Co-Creative Leadership Program which, in their full form, go broader and deeper into the content introduced here. For some, this training will be a first step in their coaching journey. For others, it will be used to extend their previous training (as coaches, as leaders) further along the path and into new territory. Regardless of where you are today, we want to welcome you to our program and look forward to supporting you along your path of personal and professional development.

For more information, visit [www.CoachTrainingAlliance.com](http://www.CoachTrainingAlliance.com).

Or call, toll-free: 888-432-4121

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Every effort has been made to make this course and any accompanying components as complete and as accurate as possible. However, there may be mistakes both typographical and in content. Furthermore, this course contains information available and believed current only up to the publication date. We encourage a life long journey of learning and this work is meant to be foundational in nature - add to it and leverage its foundational nature.

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## **Dear Team Member, Leader and Coach,**

Great leaders who have sustained organizational success are great coaches. Media and society often celebrate specific actions or individuals. What is too often ignored is that these great leaders had, by definition, great organizations following their lead, growing and enhancing their human capital.

Sustained success comes from co-creative relationships. Without these, the leader's fuel is exhausted and the engine stops. This course will introduce you to a toolset that can be used to help you become a great coach of human capital. More importantly, we will introduce ways you can apply those skills to build your capability as a Co-Creative Leader. Talent flocks to great leadership. The intention of the Fundamentals of Organizational Coaching program is to further your development as a fantastic resource for the team members you lead and understand ways to bring coaching into your organization.

Throughout this training you will be addressed and referred to as a "Coach" or "Human Capital Coach" or "Co-Creative Leader". You might say, "I am not a coach, I am a ...(insert title here) ex: Chief Operating Officer, Sales Manager, Talent Specialist." This we know. But we also know thorough the experience of training thousands of individuals and the support of neuroscience that mindset is powerful. It leads to new behavior, new skills and ultimately new mastery. So as of now, you are a coach and we will reinforce your mindset with this vernacular. We recognize and, in fact, want to emphasize that we are adding a powerful set of tools to your leadership tool belt - coaching tools. These tools, like others in leadership and management, are distinct and are to be used at the proper time and in the proper context.

A critical success factor for developing human capital rests with your ability to access and execute coaching skills within the context of organizational growth. Maximizing human capital occurs when personal growth and organizational growth are aligned within a vision.

Why focus on human capital? Great people with great skills have options and choices. While an organization invests in human capital, these human assets choose to be a part of the organization. Unlike other forms of capital, these human assets are not owned. The people that make up the organization are the largest economic engine where possession remains not just "nine tenths the law" but where the assets are extremely fluid.

We talk about the "co-creative relationship" a lot in coaching. You will hear about it

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often in this course. Co-creative relationships allow the organization, the leader and the team to work together in building human capital. Human capital, not unlike other forms of capital, requires investment, planning, and assessment to yield the highest possible return. Building your human capital results in an overall increase in the organization's capability, value and profitability. A co-creative relationship or series of co-creative relationships is a critical tool to increasing an organization's human capital.

For the organization utilizing coaching, there are great returns. The coaching skill set of the co-creative leader is the fuel that can be fed into the organization's intention. Improved communication, "good" turnover and the ability for leadership to execute strategy faster and more fluidly in the use of human talent are enhanced with a good coaching discipline. Organizations that have used coaching have shown huge returns on the investment. One study published in the *Manchester Review* (Volume 6, Issue I) cited 43 organizations quantifying the returns on coaching investment at 5.7 X the investment. The gains are generated through lowered turnover, efficiencies found through workforce driven process improvement, happy healthier work forces and ultimately a culture focused on organizational performance for personal growth. In 2011, Google conducted Project Oxygen - validating and sharing with the world that coaching was the single most correlated managerial capability to success.

The co-creative leader is a critical resource for organizational success regardless of where within an organization you sit. Welcome to the Fundamentals of Organizational Coaching program. We are honored to support you along your path to greater satisfaction and success.

I personally want to thank and acknowledge co-authors Rhonda Hess and Sandi Cardillo for their great passion and abilities in bringing this dynamic work to life. It is rare that a great team gets to marry thought with action in the manner in which it has been done here. I also want to thank Marguerite Hamm and Dave Meyer, CTA Mentor Coaches and perspective providers, for feedback and guidance. CTA also wishes to acknowledge those team member companies and their team members who have fed this program including American Family Insurance, the State of Colorado, Raytheon, Rehrg Pacific, Boy Scouts of America, BazaarVoice and so many more.

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# Course Overview

Prepare yourself for an exciting journey of personal and professional development as well as enhanced capability as a leader. Over the coming weeks, you will discover your own unique coaching style and how to grow your team's capability as you enhance your personal and professional capability.

This comprehensive program will also:

- inspire you to think and possess the mindset of a coach
- develop skills to work effectively as a coach within your organization
- introduce a structure and tools for effective coaching
- create a path for ongoing development

As mentioned before, you will be referred to as a coach, a human capital coach and co-creative leader throughout the course. This is done intentionally to keep your role as coach front and center. Neuroscience shows that what we focus on grows. Our mindset drives behavior, our behavior drives habit and habits are the systems of our human development. As of now, you are a coach. And as of now, you possess the ability to be an effective co-creative leader using coaching skills.

This program was intentionally designed to be leadership school agnostic. That is, the program is not the latest business best seller in a system or designed to replace training you have already had. Rather, the program is meant to be a set of skills and habits to be integrated with what you already know and practice as leaders. Coaching is not about what you know – it's about leveraging what you and those on your team already have, developing capability and deploying it to generate new opportunities and outcomes.

## Getting the Most from this Program

Organizational Coaching is about applying the discipline of coaching as a foundational tool in growing the capability of the team. What you receive here is guidance, direction and the wisdom of experience. This introductory program streamlines and condenses the most critical sections of our advanced coach training programs. We will draw from decades of experience training individuals as coaches and funnel that into a single stream of knowledge.

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# “Just In Time” Learning

Each component is intended to be delivered when you need it and in a way that helps you build on previous learning. It has been organized, discerningly edited, and condensed into what’s most important and timely in creating the foundation as a co-creative leader and coach. They are in a sequence that will accelerate your progress along your own path.

The Four Major Sections of Your Training

## 1. What is Human Capital Coaching?

- Purpose of coaching, what coaching is, what it isn’t, difference between Coaching vs. Leading vs. Managing vs. Mentoring
- Neuroscience of Coaching
- Impact of Coaching in Organizations

## 2. Setting the Stage for Coaching

- Stepping into your role as coach, establishing a framework
- Clarifying roles and responsibilities
- Preparing others for what to expect

## 3. How to Coach

- Structure for coaching conversations
- Developing skills- tools for effective coaching
- Strategies to support team members to take action

## 4. Putting it All Together

- Aligning individual goals with organizational strategy
- Additional applications. Strategy and Action
- How to excel at coaching

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# The Action Challenges

## **New Coaches**

Throughout the course, you will be assigned To-Do items under this heading. These challenges are designed to form the foundation upon which you are prepared to coach within your organization. The assignments you do in the beginning dovetail with the actions you take later in this course. If you are new to integrating coaching into your leadership role, these challenges are for you – new and emerging coaches.

## **Established Coaches**

Under this heading, you will find assignments for professionals who have been trained and practice coaching and want to stretch themselves and take on advanced work. These are designed for coaches who are ready to go to the next level. These are also good assignments for your second or third time through this course.

## **Advanced Work**

In addition to the Action Challenges, established coaches will want to take on the Advanced Work. These segments are marked throughout the course.

Those new to coaching are welcome to read the material but should not feel obligated to incorporate the concepts the first time through the program – feel free to revisit.

This curriculum is best used as a foundational source of continuing education. There is a wealth of material included in this comprehensive program. You are not expected to absorb it all the first time through. As you grow as a co-creative leader, you will experience the information in new and different ways. Revisiting the material on additional occasions can provide new insight and new energy for your co-creative practices.

Coach Training Alliance encourages leaders, managers and coaches alike to commit to a path of life-long learning and continuing education. We encourage a disciplined approach to the expansion of your capabilities.

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# Supplemental Documents

Included at the end of the required reading is a collection of Supplemental Documents. These accompanying materials enhance learning and comprehension. **Supplemental Documents are critical to your training and should be included in your studies for each lesson.** You will find in-depth explanations of concepts, exercises and templates that are designed to increase understanding and ease implementation.

It is not necessary to implement all the tools or recommendations at once. These are provided as a resource and should be incorporated into your work within your organization at a time that is comfortable for you.

## Putting Lessons into Action

**Like any skill, the secret to developing your ability as a coach is to put consistent and persistent energy into building your comfort and expertise *every day*.** The purpose of this course is to introduce the fundamentals of Organizational Coaching and develop basic skills to help you take your first steps as a coach. Neuroscience tells us that developing a new skill into a new behavioral practice takes both time and consistency. Be prepared to struggle initially. You might feel momentarily discouraged, but do whatever you need to do to get back on track. The more you put your new skills into practice, the more comfortable and confident you will begin to feel. You may use the skills you develop in this course immediately.

This introductory training program also prepares individuals for more advanced coach training such as live group mentoring, real-time coaching practice, critique and feedback. **For those that want to go deeper in their training,** Coach Training Alliance has advanced training opportunities, customized workshops and live group instruction to fully develop your capability—supporting you as you practice, improve and grow your capability and confidence. Opportunities to build upon the knowledge you acquire here will be covered at the end of the course.

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# Section I

## What is Organizational Coaching?

### Section I

#### Lesson I

### What is Human Capital Coaching?

“Probably my best quality as a coach is that I ask a lot of challenging questions and let the person come up with the answer.”

**- Phil Dixon -**

Coaching is a highly tuned and powerful process of communication and problem solving. The relationship between a coach and a team member is co-creative and focused entirely on the team member’s interests, challenges, and goals within the context of the organization’s mission.

**If you have ever had a powerful conversation with someone and, as a result, they trans-formed in some small or even significant way, you were probably using coaching skills.**

Co-Creative Leadership is about taking the powerful conversation referenced above and making it a disciplined habit supported by a simple model. The co-creative leader uses coaching to become a guide on the team’s journey to increased capability.

**In its simplest form, coaching is a powerful conversation between a trained leader and a team member who is ready and willing to focus on personal and professional growth.**

#### **Definition of Coaching**

- Supports others to their desired outcome
- Focuses on the participant
- Creates accountability
- Helps others enhance their roles and identify action steps

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- Assists others in finding their own solutions

### ***Purpose of Organizational Coaching***

- Engagement
- Use and Grow Individual/Team Capability
- Create problem solvers
- Communicate with Context
- Accountability

**Coaching is about growth and supporting others** as they work towards the change they see for themselves. The Fundamentals of Organizational Coaching puts specific focus on coaching others within an organization. We believe that organizations exist to get work done. It is the hearts and minds of the humans who are part of those organizations who create value and that is as crucial as any other resource in accomplishing the goals of the organization. Your organization's commitment to you and your leadership is reflected in the time, capital and focus this training has been given. Its yield is up to you.

### ***Organization Context***

A Human Capital Coach might occupy a role of leadership within the organization, often serving as a member of management or possibly within a specialist capacity in Human Resources, Training and Development or Organizational Development. Alternatively, a Human Capital Coach can also be an individual manager working to elevate the skill set, capability and engagement with direct reports. In both cases, a Human Capital Coach works within the organization to (formally or informally) build the people resources of the organization. As you will come to know, coachable moments in organizations come in many forms. Coaches may coach up, down and sideways (cross functionally) in their organizations. The tools of coaching and the basic models you will be introduced to can be used in all sorts of work including hiring, planning, sales and any other place in the organization where communication is critical and work needs to get done.

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## Section I

### Lesson II: Coaching is Not...

- Counseling – diagnose, treat or fix the Client
- Consulting – giving advice except around legal advice or organizational policy
- Manipulation
- Taking responsibility for the Client’s feelings, decisions, actions or success
- Doing the Client’s work

#### **Coaching vs. Consulting**

Consultants advise their teams how to solve problems.

**Coaches guide their team members to their own solutions.**

Consultants are focused on results.

**Coaches are focused on people and their results and outcomes.**

Consultants are hired to produce a certain outcome.

**Coaches support the team member as they achieve their desired outcome.**

There are some similarities between coaching and therapy. Both relationships develop over time. Confidentiality is critical in both. The needs and wants of the team member are the focus for both. Also, there are professional ethics and standards for both.

There are some additional important distinctions. **Coaching is not appropriate as front-line support for individuals suffering from chronic depression, anxiety, neuroses or addiction.**

Coaching conversations take place with team members who are “well” and highly functioning individuals - who have generally accepted their past and intend to focus on their present and future. They are individuals who take responsibility for their own lives and will benefit from accountability.

It is possible that you may uncover a deeper problem that cannot be supported through a co-creative coaching relationship. In those cases, the coach will need to determine how to suggest that the individual may benefit from a therapeutic approach. Most organizations have an Employee Assistance Program available. Use

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the methods suggested through that program to discuss your concerns with the individual being coached. Often, Employee Assistance Programs provide guidance on how to approach an individual who might benefit from the use of the program. In most cases, this will require that you work through your organization's Human Resources professional or direct manager. **If you are the organization's Human Resources Professional, be very clear that you have moved out of your coaching role in this instance.**

## **Coaching vs. Therapy**

Therapists work with people that need or want professional help to work towards healing, recovery, and issue resolution.

**Coaches work with team members who want a detached partner to help them enhance their roles in their organizations through action.**

Therapists are experts in medical and behavioral sciences trained to treat diagnosable conditions.

**Coaches use questions and reflection to highlight their team member's strengths and areas in need of development and then help people uncover their own wisdom and solutions.**

Therapists are required to keep their personal feelings & thoughts removed.

**Coaches use personal disclosure as a tool to catalyze and challenge their team members.**

## **Ethics and Standards**

As in any professional field, there are ethics and standards for coaching. To be a credible Co-Creative Leader, it is critical to hold yourself to the highest standards from your very first experience coaching. Trust is the foundational requirement for a healthy organization and for a co-creative relationship with your team. Organizational integrity starts with you. Trust is something assumed only after it has been built brick by brick through consistent and tested behavior.

**If you develop and operate from your highest integrity, you will do your best.** Check in with yourself before you engage with a new team member and from then forward during every session. Listen for the internal voice that lets you know if you are in or out of your integrity.

The most common ways you might fall out of integrity with your team members are:

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- Failing to walk your talk
- Trying to fix or save your team member
- Breaking the team member's confidentiality
- Taking credit for ideas that are not yours
- Misrepresenting your experience
- Taking the team member's responsibility away from them
- Making unrealistic claims about the benefits of your services
- Avoiding discussions with team members about current and unresolved issues
- Creating conflicts of interest or compromising dual relationships with team members

For some perspective, we suggest reviewing information about the International Coach Federation's philosophy of coaching and professional standards, view ICF's Standards of Ethical Conduct at [www.coachfederation.org](http://www.coachfederation.org).

The list below provides red flags to help you know that you are entering dangerous waters. Think of them as the red flag warnings at a beach. Know where you are, proceed with caution, and if the danger presents itself in the extreme, map how you will handle it. Who are the emergency resources? What is your plan for when things go awry? How will you know? What will you signal to the team member?

- You do not respect the team member.
- You find it draining to coach the team member.
- You continually over-deliver to impress a team member.
- You find out that the team member is doing something illegal (No choice, you must take action).
- You feel resentful about your time invested in the team member.

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- You realize that you have sexual or romantic feelings for the team member.
- The team member is telling you what you want to hear instead of the truth.
- You repeatedly want more for your team member than they do for themselves.
- You can no longer be objective and are repeatedly hijacking the agenda.

## **Action Challenges**

### **New Coaches**

1. Spend some time with your organization's Human Resources Policies and Procedures. This may help you distinguish advising and coaching and when to refer a team member to other resources.

### **Established Coaches**

1. Has anything changed in your organization that requires you to rethink your coaching style and/or process?
2. Ask yourself: Am I upholding the professional ethics and standards of the coaching field?



## Section I

### Lesson III: Coaching vs. Leading vs. Managing

Occasionally, the distinction between coaching, mentoring, leading and managing become blurred or used interchangeably. Coaching requires active participation from the team member and therefore it becomes critical to declare when you are creating an opportunity for the team member to contribute to the conversation in a very specific way.

Coaching	Leading	Managing
Co-Creative	Visionary	Directing
Focus on People	Focus on Future	Focus on Reportable Results
Guiding	Influencing	Top-Down
Listens	Thinks	Tells
Responds to People	Responds to Org Needs	Responds to Data/Goals
Supportive	Strategic	Analytical
Individuals Goals	Organizational Goals	Project Goals
Helps Remove Barriers	Get the Right People in the Right Seat of the Bus	Goal Execution
Non-Judgmental	Challenging for More	Fact Based
Asks Questions	Communicates Organizational Goals	Creates Process to Achieve Goals
Focus on Introspection	Focus on Influencing	Getting it Done
Individual Growth	Organizational Growth	Project Completion

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## **Action Challenge (New & Established)**

Discuss this chart above with colleagues, team members or those in your network to create awareness of when you are stepping into/out of each role.

## **Section I**

### **Lesson IV: Neuroscience of Coaching**

“You get the best effort from others not by lighting a fire beneath them, but by building a fire within”

**- Bob Nelson -**

“You can motivate by fear, and you can motivate by reward. But both those methods are only temporary. The only lasting thing is self motivation.”

**- Homer Rice -**

Our beliefs influence our thoughts. Our thoughts influence our behaviors. Our behaviors influence our patterns. Our patterns influence our habits which become our way of being.

The human brain is predisposed to utilize existing, established neuronal pathways.

- **Beliefs exist within a brain.** These become the established neuronal pathways.
- **There is Comfort in established patterns** (even if faulty). The existing pathways of thoughts and belief are the most comfortable patterns.
- **NEW is uncertain-** There is a deep primal urge (fear of new, survival) that root us to our old, established patterns (old way of being). At times, this instinct protects and serves us. At times, it holds us back.
- **Established Pathways pull us back.** Because of the discomfort (new feels unsafe), our instinct is to preserve and remain rooted in our established pathways. As a result, we remain locked in the same though patterns, connections, beliefs and understanding.

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As coaches, we are focused on the growth and development of individuals. **For growth to be possible, we must create the opportunity for new neuronal pathways and connections. But how exactly do we do that?**

### **How are NEW neuronal pathways created?**

**External Change:** When change is forced from the outside, NO new neuronal pathways are possible. When given an order, a fact or directive- **NO Part** of the brain lights up.

**Internal Change:** When change comes from within- such as an “Insight”, “a-ha” moment, or thought that originates from within, three different sections of the brain light up. They are the ones responsible for:

- Higher performance
- Creative, higher thinking ability
- Solutions

When we coach, we engage in a co-creative conversation where the team member actively engages in possibility thinking, creative thinking and shifting awareness. *Coaching helps individuals to experience change from within and, as a result, new neuronal pathways and connections are possible.*

Coaching creates the opportunity for team members to shift their normal thinking (way of being, understanding) and create new pathways of thought. This is true mental growth and development. Change takes place from within. Once this has occurred, individuals may then tap into these new pathways, to think differently, to view new possibilities thus expanding their capacity to solve challenges or create opportunities.

When we talk about growing the capability of team members, we are not referring to our ability to “coach them” to the solution we “know” is right. We are not “helping” team members to arrive at our conclusion. Coaching is about growing the capability of an individual and expanding their ability to think, connect, understand and know more broadly. Coaching makes greater capability possible.

We coach to unleash the capability of our teams. We coach to translate the energy of inevitable and required change from anxiety into growth and trepidation into execution. We coach because it increases engagement, enhances communication and improves long-term performance. In the end, the disciplines of coaching not only aid our team – they increase our abilities as well.

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# Section I

## Lesson V: Impact on the Organization

The field of coaching continues to grow and be validated by its impact on those organizations that adopt it as a best practice. Coaching produces satisfying results for individuals from all walks of life. Corporations, government agencies, educational institutions, and non-profits are discovering the value of coaching for their organizations.

### Impact for Team Members

- **Increased Engagement**-- Actively involved in crafting solutions, future
- **Personal and Professional Growth**- Increased capability, broader view
- **Supported Accountability**- Partner to help them follow through to achieve goals
- **Reduced Levels of Stress**- Architect in their own lives/ self-determination.
- **Meaningful Connections**- Connects work to personal goals. Purpose to action.

### For Managers/Leaders

- **Preserves the vitality of leadership** – help managers shift modes so that team members can do their own work
- **Reduces stress**- Removes pressure to always be the expert or the hero. Leverages existing talent and knowledge from teams. Broadens and captures capability of team.
- **Adds resources**- Growing individual capability ultimately adds to the capability of the team (department). At a time when managers are being asked to do more with less, coaching creates ongoing growth which systematically and relentlessly increase the team's resources and capability. Once you get the right people in the right roles, organizations need individuals who understand how to lead, motivate and continually develop the talent they have hired.

### For Organizations

- Ensures the ongoing evolution and development of talent
- Reduces turnover/increases employee retention
- Respond to change more quickly
- Create new opportunities
- Leverages talent that has already been hired
- Harvests ideas from all levels of the organization
- Integrated culture of learning and growth vs. scheduling time for training and development programs,

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The strategy set by leadership (10 year, 5 year or 2 year strategic plan), must be understood throughout the organization. Organizational Coaching creates an environment where individual team members gain awareness and begin to connect personally with the strategic goals; giving purpose to action and a deeper understanding of how they contribute to the Big Picture. Organizational Coaching helps align the talent they have hired with the mission, vision and values of the organization.

## Return on Investment

A *Harvard Business Review* study reported organizations that focus on employee attitude and satisfaction found that as the quality of management improved, so did employee attitudes and correspondingly, customer satisfaction. Citing a study with a major retailer, *HBR* reported...

“... The numbers showed that “a 5 point improvement in employee attitudes will drive a 1.3 point improvement in customer satisfaction, which in turn will drive a 0.5% improvement in revenue growth.” In a billion dollar company, a 0.5% increase in revenue is substantial...

“...when managers fully value and develop their employees (*i.e.*, using the Manager as Coach Approach), they could confidently predict future revenue growth in a particular district. When employee satisfaction increased 5%, revenue growth in a particular store increased by 5.5%

- *Harvard Business Review*

Human Capital Coaching focuses specifically on the growth and development of the Human Resources of the organization. Co-creative leaders drive their leadership outcomes as a value-adding partner to all levels of managerial leadership in growing, developing and leading talent in the workplace. An expanded list of studies assessing the Return on Investment for organizational coaching (summary and outcomes) is included in the Supplemental Documents which appear at the end of this material.

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# Section II

## Setting the Stage

### Section II

#### Lesson I: Stepping Into Your Role as Coach

“Those who make it happen will tell you it wasn’t easy.  
Those who think it should be easy won’t make it happen.”

- **Will Craig** -

**Founder of Coach Training Alliance**

“Trust in yourself. Your perceptions are often far more accurate than  
you are willing to believe.”

- **Claudia Black** -

**To coach effectively, start from the center of who you are, and connect with your team member from that authentic place.**

Most individuals have the potential to be a great coach. Becoming a successful coach requires a blend of:

- Authenticity
- Commitment to success
- Discipline
- Integrity
- Honed communication skills
- The ability to create a proper coaching environment

All coaches find a particular style that builds on their individual blend of knowledge,

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skill, experience and capability. It would be extremely challenging to be a good coach without the experience, maturity, and acquired life skills of a journey already in progress. The best coaches are, in essence, guides along the path of life for those who wish to travel new roads. Achievements whether an achieved budget or an industry award are merely important markers on the ascension of capability and further success.

As a Co-Creative Leader and coach, you'll encourage your team members to be themselves, to expand beyond their limitations, and to become stronger, more alive human beings and engaged team members.

Understanding how to step into your role is critical. It helps you establish the internal foundation upon which you build your coaching style. Your approach here sets the tone and initiates the habits you will develop through the course and throughout your development as a coach.

Be an authentic coach with your own personal style. Use the tools you will be learning in a disciplined manner BUT be yourself.

## **Balancing Doing with Being**

Any endeavor is accomplished more easily and effectively when you are fully present. Being fully present requires a disciplined self-awareness as a coach void of the distractions of past events and future tasks. In coaching, if your focus is on performing and doing all the "right" things, you won't create the positive impact that you intend with your team member. This is not a passing comment but rather a key accountability co-creative leaders continually need to ask of themselves.

Coming from the "being" place makes coaching more powerful and builds your reputation as an effective Co-Creative Leader and Human Capital Coach.

When you feel anxious about building your reputation, or your ability to be truly helpful to your team member, shift your focus away from yourself and towards your team member. When you re-focus your attention on being fully present with people and the process, knowing that you are enough - you will be able to create the space for a productive coaching conversation to occur.

**Coaching is about listening to and responding to your team member, rather than advising or fixing them. Deep listening ultimately requires practice, not expertise.**

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## The Special Challenge for Leaders

Leaders in organizations are often asked to advise or make decisions. Part of what they do is direct work. You have been rewarded in your career for being an effective and efficient decision maker – a person of action. In many cases we have been rewarded for our speed and bias to action. Your organization may have come to expect quick, smart and decisive action from you. This is valuable BUT it is not coaching and rarely grows other people's abilities or allows them to be unleashed. Moreover, your team likely often wants to insure they are pleasing you and doing as you would want. **For this reason, you will need to become very clear when you are coaching and when you are advising or directing work. If you fail to declare that you are coaching, your team member will be likely be looking to please you rather than gain capability.** You might consider developing a question, such as “may I coach you?” which will differentiate for both you and team member when you are acting as an advisor, manager or supervisor and when you are acting as a coach.

**Why coaching can be challenging.** We understand that (while the coaching conversation is happening) we do not need to have the answers. When we coach team members, we accept that we do not have to be experts. This can be both liberating and stressful. If you historically have enjoyed being a hero to your team members (providing the answers knowing exactly what to do in a particular situation), it can be difficult letting go of that role. To help you step into your role as coach, consider, “How does ‘rescuing’ my team member make me feel?” What value does that bring to my team member? What impact does this have on our organization?”

**Tyranny of the Urgent.** There will be coachable moments that present themselves which may come at very inconvenient times. How much time does it take to provide a quick answer? How much time does it take to help a team member work through a challenge? As you step into your role as coach, begin to think of ways to create time for coaching conversations. When you schedule a coaching session, it allows both you and the individual being coached to mentally prepare for what is about to happen. Coaching develops your team into thinking, creative problem solvers who can work through challenges instead of having to come to you for resolution. Eventually, you will reduce the number of times you are being asked to provide the quick answer.

## **Action Challenges**

### **New Coaches**

1. Ask five people what it is that already makes you a great coach. Listen, take notes and look for themes.
2. Ask yourself: What makes me who I am? Make a list of your unique character traits, strengths, skills, and talents. Acknowledge yourself.
3. Identify a few situations that may call for coaching vs. direct advice. How will you manage the boundaries of giving advice or serving to co-create a coaching relationship?
4. Make a note of how often team members come to you for advice or quick answers. As you begin coaching them, notice how often they answer questions on their own, or solve challenges without having to come to you first.

### **Established Coaches**

1. Record your sessions with someone you are coaching (ask their permission).
2. Listen for whether you are being fully present with your team member. In future sessions, if you notice yourself feeling anxious about helping your team member, worried about what you're going to say next, or focused on fixing your team's problems, shift to being present.

## Section II

# Lesson II: Clarifying Roles and Responsibilities In a Co-Creative Relationship

**For any Co-Creative Leader, Manager or Coach** - The most important step of coaching is establishing the co-creative relationship. Make your role clear to your team members. Help them to fully understand their role as well. Communicate this clearly, before you begin coaching.

**If you are considering a full-scale enterprise wide implementation of coaching, we have several documents that will address additional challenges relating to the role of the coaching ambassador (individual leading the project) and the leadership team. See: Formal Enterprise Implementation. At Coach Training Alliance, we believe successful coaching implementations are Endorsed by Senior Leadership, Supported by Internal Experts and Leverage front line managers. However, we understand every organization will chart their own path for how they will introduce and implement coaching. The lessons in this section are designed to support you as you introduce coaching to your organization and will compliment all of the material in the optional section of this program.**

## The Co-Creative Leader's Role in Coaching

A coach is an unattached thinking and accountability partner. The coach is responsible for:

- Setting appropriate boundaries and policies
- Letting the team member determine the agenda for sessions
- Listening to the team member on multiple levels continually
- Asking powerful, direct questions
- Genuinely appreciating, endorsing, and supporting the team member
- Taking the risk to be wrong rather than holding back important truths
- Assisting with setting goals, planning and strategizing

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- Offering perspectives, options, and suggestions to raise awareness and catalyze the team member's own solutions
- Making powerful requests to deepen the team member's process between sessions

These are things coaches DO NOT do with their team members:

- Diagnose, treat or fix the team member
- Manipulate or take advantage of the team member relationship
- Take responsibility for the team member's feelings, decisions, actions or success
- Give advice. However, there may be times when the situation requires direct advice giving due to a legal or policy matter. At that time, the Co-Creative Leader will need to step out of their coaching role and clearly state that they have moved to the role of advisor.
- Do the team member's work for them
- Work with a team member when the coach's integrity says it is not right anymore
- Get invested in what a team member does

## The Team Member's Role in Coaching

Your team members are highly functioning individuals who choose to work with a Co-Creative Leader to make more progress towards their goals and dreams than they would on their own. In some cases, you may find yourself in a coaching relationship with someone who has been directed by his or her manager to receive coaching. This direction is often about assisting that individual in making more progress toward organizational goals than they would on their own. The end goal is that they are able to become more effective in their role from this coaching process.

In a coaching relationship, team members:

- Are responsible for his or her own feelings, solutions, actions and progress

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- Bring a well-formed agenda to most sessions. See “How To Coach” for a detailed description of what this means and why it is the most important step in the Simple Coaching Model.
- Come prepared to think differently, explore possibilities and generate the answers or solve their problems
- Develop their own thoughts vs. expecting manager to provide answers, advice and ideas
- Tell the truth as they understand it to the Co-Creative Leader
- Do their own work
- Show up physically and energetically to sessions

## What To Do with Your Expertise

While you undoubtedly have expertise and experience, and your team members may find that useful, you do not have to be an expert in order to be a masterful coach. Remember, you are unleashing and building capability that your team already possesses the potential to deploy.

So what do you do with your expertise? **If the team member wants to be coached to their own solutions, your expertise will provide guidance rather than step-by-step instructions during sessions.** There may be a time when you believe your team member has a gap in information. At this point, you may check in with the team member and “declare that you are stepping out of your coaching role” to provide the missing information. Once that has been done, you can “declare you are stepping BACK into your role as coach”, and continue on with the coaching session. Beware the tendency to lapse into a consulting role with your team member. There are strong distinctions between coaching roles and consulting roles. If your team member really wants traditional consulting, you may need to identify that. They are inherently different from the co-creative coaching relationship.

## Section II

### Lesson III: Preparing Others for What to Expect

Before you have your first coaching conversation, you will need to prepare others for what to expect. You may include a handout, email or simply discuss how coaching works and what you as the coach will and will not do. This introduction may be done in a group setting or individually, but it is an important activity. The expectation is that your coaching conversations will focus on collaboration and co-creative problem solving.

It is also important to address confidentiality at this point. As a coach, you will maintain the strictest levels of confidentiality with information that is shared. If something is said during a coaching session that requires that the confidentiality be broken, the coach will inform the team member of the concern before ever moving that concern outside the relationship.

### Transitioning Your Organization to a Co-Creative Mindset

In the Introduction, we discussed the value of Human Capital Coaching to the organization. Human Capital Coaching does not replace traditional Human Resources advising work or Managerial Leader development. It is an enhancement to both that enables the organization to retain and grow its employees as true human capital.

**Managers- If you are working with team members** who report directly to you, it may be necessary for you to educate them on the value of a co-creative work and the coaching process. “Why are we doing this?” Consider what FAQs your team members may have. What are you doing? When? Where? How? And, most importantly – Why? Be ready with these answers. As a Co-Creative Leader, you will need to frame the answers to these questions. Be ready. This compliments any work you do to clarify their role and responsibilities.

**Internal Coaches- If you are responsible for developing talent** in your organization (Internal Coach, Talent Development, Training, Emerging Leadership...) you might consider how best to educate the leadership team about the benefits of coaching. How receptive to the idea are they already? Do you need to create a business case for coaching- “Is Organizational Coaching Right for Us?” In the optional material we have included a few tools for creating a business case for coaching (an argument for

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introducing and implementing a company-wide initiative for coaching).

**Senior Leadership- If you are part of the Senior Leadership Team**, how clear is the leadership team in understanding the benefit to them directly and to the organization as a whole. Any presentation should include information on how it will help them achieve strategic goals and key initiatives. What powerful questions could be used to help create awareness and understanding about coaching? “Why are We Doing This?”

## Action Challenges

### *New and Existing Coaches*

1. Craft your Co-Creative Leadership Statement. This can be a 30-second “elevator” speech about your role as a coach. While it is important to be prepared, people will connect more deeply with your message if you are honest, sincere and authentic. If an “elevator” speech feels too stiff, consider simply providing a story or example of how coaching touched your life (or someone you have coached).
  - a. Consider how you might respond to the question: What is this Co-Creative Leader thing? What is coaching all about? Why am I being coached? An example might be, “When I coach, I listen, reflect, and help people get clear about what’s important around here. The intent of coaching is to allow people to grow their abilities.” Following up this statement with a real example can be very powerful.

## Section II

### Lesson IV: The Co-Creative Relationship

By now, you are prepared to make it clear what you do and don't do as a coach. You also have a plan to make it clear what they are to do as the team member. Setting these expectations from the beginning is critical to establishing a good coach/team member relationship. The next phase of preparation is to consciously establish the co-creative relationship.

As a reminder, not every conversation you have will be a coaching conversation. **When you declare that you are coaching, team members will gain clarity about what you expect from them- and the unique co-creative opportunity that each of you are consciously participating in.** When you distinguish the difference between your role as a coach and your role as a managerial leader, you create a venue for the co-creative relationship to take form.

Sometimes, a strange thing happens in a coaching relationship. The coach becomes inflated in their role and/or the team member never fully assumes their role. Feeling uncertain of the breadth or limits of the coaching process, the team member hesitates. Be alert for this kind of imbalance. It can cause trouble.

At any time, if you realize that you've not been clear about this, correct it immediately by having a conversation with your team member. Make sure the co-creative relationship is clear before you continue.

### The Coach

When you are just getting started as a Co-Creative Leader, it is natural to be nervous and to feel a bit wobbly. Notice if:

- You are nervous during sessions.
- You feel the need to perform for your team member.
- You are anxious to solve problems and to prove your value.
- You tolerate your team member's lack of a clear agenda, or chronic lateness to sessions.
- You feel drained after sessions.

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All of these are symptoms that you are taking on more responsibility than is rightly yours. As coach, it's your responsibility to monitor the "health" and integrity of your coaching relationship. It will not work for you to inflate your role or for your team member to avoid stepping into the appropriate team member role. If the roles remain unbalanced, the only ethical choice is to terminate the relationship.

## The Team Member

If a team member is not fully engaged in co-creating their solution, bring these things to their attention respectfully. Review the roles if necessary. Most team members will begin to understand and step fully into their role. Give them the opportunity to respond.

Likewise, you may need to occasionally clarify when you are NOT inviting them into a co-creative conversation. Example: You declare that you are giving a directive, providing advice, communicating goals. These examples require the team member to contribute to the conversation in ways that are entirely different from a co-creative coaching conversation.

Congratulations! You've just completed Section One and Two of the *Fundamentals of Organizational Coaching*. The beginning of a journey is always full of excitement, as you get under way. Take the time to acknowledge the ground you have covered so far. You are on the way to building your skills as a Co-Creative Leader!



# Section III

## A Simple Coaching Model

It is helpful to have a model for the coaching process when you are first getting started. The model below is simple for good reason. Your attention should be fully on the team member instead of on what you are doing and saying.

**Coaching flows through these steps *naturally*.** Initially, using the model will feel clunky and clinical. With practice and improvement, you will develop comfort and confidence. With mastery, you will eventually integrate it easily into an effortless process with your team members, colleagues and other organizational partners (both internal and external).

1. Clarify the Agenda
2. Seize the Coachable Moment
3. Invite the Shift
4. Frame the Masterpiece

### Step 1. Clarify the Agenda

This phase of the session sets the stage for a successful and satisfying coaching session.

After you welcome your team member, they will begin to share what's on their mind. Ask open-ended questions to uncover these three aspects of their agenda:

- The specific topic they want to explore in this session
- Any important details about the topic
- What exactly they want to take away from this session. This may be a shift in perspective, solutions or next steps.

Before you can proceed with coaching, all three pieces of information should be crystal clear to you. If not, ask more questions to clarify the agenda.

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## **Step 2. Seize the Coachable Moment**

Once you've clarified the agenda and if you've been listening closely to your team member, you may have an "aha" about what's at the center of their topic. Often, in the first few minutes of the conversation, your team member supplies clues about how best to coach them. These clues point to "coachable moments."

Coachable moments are potential roads to travel with the team member to eventually arrive at their desired take-away for that session. Key in on what seems like the best road to explore first. As the conversation unfolds, you may explore multiple coachable moments, but not necessarily all that are presented.

Do not rush the team member towards solutions. Take your time and allow the session to feel spacious by asking direct, open-ended questions as you listen deeply and respond intuitively to your team member. Your goal is to let the team member's wisdom unfold as a catalyst for their transformation.

## **Step 3. Invite the Shift**

With one or more of the coachable moments explored, the team member is likely to experience a shift. They may have new understanding about something, a renewed sense of inspiration, motivation, commitment or direction. A whole new world of options may have opened to them.

You will "invite" the team member to acknowledge their shifts, and encourage them to use their new awareness to spark new possibilities.

## **Step 4. Frame the Masterpiece**

Endorse the team member for their new perspectives, ideas, self-awareness, clear understanding – whatever came out of the coaching conversation. If appropriate, help them develop next steps, goals or strategies.

Close by asking the team member something to the effect of: Where did you find value in today's session?

See a Coaching Session Transcript that illustrates each step of the Simple

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Coaching Model.

## Section III

### Simple Coaching Model

#### Step 1: Clarify the Agenda

### Clarifying the Team Member's Agenda

The team member's agenda is more than just the topic of discussion for the session. The team member's agenda **includes the details surrounding the topic and what the team member wants to take away** from the session.

The first phase of your coaching session is about setting the stage. You may be tempted to rush through this part to get into more dynamic coaching, but don't. Make sure their agenda is clear before you proceed.

As your team member begins to share what is on their mind, listen closely for the key points that compose their agenda:

- The **specific topic** they want to explore in this session.
- Any important **details** about the topic.
- What exactly they want to **take away** from this session. This may be a shift in perspective, solutions or next steps.

Ask open-ended questions until the agenda is clear to you. Also take note of:

- The team member's **exact words** about their topic.
- The feel of the words in their voice and **energy**.
- Potential other or **underlying agendas**.

If you are listening closely, the team member will usually tell you exactly what they want out of the session in the first 1-5 minutes of the session. If you don't hear it, it's critical to ask: "What would you like to take away from this session?"

The team member's agenda is the guideline for the session. It empowers both the team member and the coach by providing a pinpointed focus for the conversation. If the team member's agenda isn't clear or the coach does not fully serve the agenda, sessions tend to ramble, feel more like therapy than coaching, and are often not very

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effective.

## Hijacking the Agenda

We've talked about being blank. You've learned to quiet your mind in sessions so you can listen to your team member. Now it is time to **learn how to leave your agenda behind completely.**

Telltale signs that your agenda has crept into the session:

- After reading your team member's session prep form, you plan what you'll say in the session.
- Your suggestion or observation doesn't land with the team member and you can't let it go.
- Your focus is primarily on what you are going to do or say next.
- You feel judgmental towards your team member.
- You think you know what is better for your team member than they do.
- You fill the time with your own opinions, perspectives, and stories.
- You make your team member wrong.

As soon as you notice any of these, take a moment and a breath. Let go of your position. Become blank again.

Your judgments, biases, opinions, perspectives, stories, assumptions and interpretations may or may not have relevance in the session. If you decide to share them with your team member, do so lightly. **Consciously, open up your mind and allow your team member to have his or her own way, his or her own perspective and choices.**

If you notice that you have come on too strong and are attached to your team member seeing it your way, come back to holding the team member's agenda.

**The agenda is the starting place in every session.** Without a clear agenda to guide the session, it will meander aimlessly. Masterful coaches take the time to fully clarify the agenda before moving into the coachable moment.

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## Section III

### Simple Coaching Model

#### Step 2: Seizing the Coachable Moment

During or after clarification of the team member's agenda, "coachable moments" begin to emerge in the conversation. This is the place in the session where dynamic coaching begins.

Coachable moments are potential roads to travel with the team member towards their destination. **The intended outcome of exploring coachable moments is to help the team member shift perspective relating to their agenda.**

A coachable moment is where the coach has an intuitive "aha" and checks that inkling with the team member. Coachable moments are not the point in the session to strategize or decide next steps. That comes later.

#### Nine Subtle Clues

Your team member is continuously providing you with clues on how to coach them. That's why it's so important to listen closely and stay present with your team member during sessions. These clues are often subtle comments that sound different from other things said, almost as if they are highlighted in your awareness.

Coachable moments present themselves as opportunities for powerful coaching. The first clues appear in the agenda itself. And then more clues emerge as the session progresses.

**Here are nine types of subtle clues to the coachable moment:**

1. Offbeat or repeated words and phrases
2. Missing pieces in the story
3. Strong or weak energy
4. Inconsistent statements

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5. Nervous laughter or sighs
6. Sudden, strong or contradictory emotions
7. Assumptions, interpretations, limited perspectives
8. Inflation of roles
9. Throw-away comments

**All you are trying to do is awaken their mind to new perspectives.** Once their mind is open, they'll be on their own way.

## **Coachable Moments and Emotions**

Because coaching evokes the emotional side of the brain, coachable moments can sometimes cause strong emotions to come to the surface. Team members occasionally break into tears or raise their voices. This doesn't mean you need to stop the coaching and refer them to a therapist. Don't be afraid of your team member's tears and strong emotions. Only chronic or unmovable emotions are a cause for concern.

**Strong emotions are often just a discharge of energy that precedes a time of meaningful action.**

Take care not to step over emotions and go on as if you didn't hear them. On the other hand, **limit your empathetic response.**

- Slightly slow your voice
- Show understanding and compassion
- Keep your boundaries
- Encourage your team member to let their emotions move
- Give them time and space to feel through their emotions

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## **Action Challenges**

### **New Coaches**

1. Listen to the Coaching Demonstrations and identify the coachable moments.
2. As you coach, when you hear a team member pause in their story, count to five before you speak. When the coach is silent, it encourages the team member to add additional information that is valuable.

### **Established Coaches**

1. Review your coaching sessions and annotate what clues the team member gave for possible coachable moments.
2. Slow down your coaching sessions. Speak more slowly. Take a breath between comments or questions. Less is more.

## Section III

### Simple Coaching Model

#### Step 3: Inviting the Shift

One of the reasons coaching works so well is because it can catalyze internal change. Before actions are taken, your team members move toward big goals by making small and significant changes in who they are and how they see themselves and their situation.

Once the team member's agenda is clear and one or more of the coachable moments have been explored, the team member is likely to experience a shift in perspective or understanding. They are ready to take a leap beyond the stuck place and towards possibility thinking.

**A common mistake Co-Creative Leaders make is that they try to move the team member too quickly into strategy or action mode. Be patient with the process of coaching. First, allow the team member to “get” the juice of the session – the shift.**

Have you ever seen your reflection in a window as you walked by and noticed that your posture could be better? Without thinking about it, you straighten up and move on. In effect, that is what happens with coaching. You show your team member a reflection of himself or herself so that they can make an adjustment in who they are being, how they are be-having, attitudes and habits. Suddenly there is a distinct contrast between then and now. That contrast highlights the shift.

**It is counter-productive to lock onto solutions and push for action before the team member is fully ready. Any actions planned before the shift is invited, will fall flat because there is not enough impetus from within the team member.** Remind the team member of their goals or what they've said they want. Sometimes a well-placed question calls a team member to shift.

**Inviting the shift is a subtle process.** In a short time, you'll learn to recognize the moments that lead to transformation and how critical they are for the success of the session, the coaching, and the team member's goals.

When inviting the shift, consider these ideas to help the team member begin to see the possibilities:

- Use contrast
- Suggest a shift in focus or perspective
- Use metaphors, illustrations and stories to help team members see and feel the shift
- Be direct and challenging in your approach
- Don't push it; just nudge the team member toward what they most want.

Don't try to push or force a shift. Every person has his or her own pace. Honor your team member's pace, but always be aware of the context being framed in the organization's overall pace of change.

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# Section III

## Simple Coaching Model

### Step 4: Framing the Masterpiece

The Co-Creative Leader's goal is to help achieve alignment around the change. In coaching sessions, **the masterpiece is that shift your team member just made.** Everything that happens in the session after that turning point is about "framing" the masterpiece.

When a work of art is well framed, it is being honored, given a spotlight for appreciation.

When a Co-Creative Leader helps their team member frame the session, it is about fully appreciating the shift and moving it forward into the team member's future. Up until now, the activity in the coaching session has been about mental and emotional transformation, opening the mind. Now, what will the team member do with the shift?

Framing includes:

- Confirming and appreciating the team member's shift(s)
- Encouraging the team member to integrate and apply the shift

### Call Attention to the Moment

It would be easy for the shift to go unnoticed. Human beings tend to move on to what's next without pausing to reflect. Instances of "possibility thinking" are victories to be celebrated. It is the team member's victory. They have changed their perspective, their attitudes and their ability to think with an open mind. They have discovered their own wisdom and solutions. Enjoy your team member's success. Honor their wisdom and intelligence. When you do, changes come easier to them.

### Inspiring Integration and Action

While not the goal of a coaching session, an ideal outcome of coaching is integration of the shift, which may include planned, targeted action. We want to keep our team

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members moving, but we're not herding cattle here. Remember that getting a team member to the point of meaningful action takes constant listening and thoughtful questions. Once they have fully arrived in the shift, asking them to take action is straightforward.

Now is the time for both the organizational level and the individuals leading the change to be using the SMART goal process. If you are not familiar with SMART goals, visit the Supplemental Documents for a detailed description of how to create SMART goals.

### ***Getting SMART***

Listen for the details – who, what, where, when and how – of their next step. Ask questions to glean this information if the team member hasn't supplied it. Use what you know about SMART Goals to help your team members hone their strategies.

Any plan or goal should be:

- Specific
- Measurable
- Achievable
- Risky (require taking some risk)
- Time Limited

This will harness the energy the shift brings. Creating SMART goals uncovers concerns to be addressed by action and forward movement. As the human capital coach sees individuals, teams and the organization begin to move from inviting or allowing the shift, the opportunity moves from vision to steps for fulfillment.

# Section IV

## Effective Coaching Tools

In coaching, the tools of the trade are all innate abilities. You already have gifts and talents that are valuable for this profession. Once honed, these powerful tools will shape, form, and mold your coaching sessions and help team members transform themselves.

Two of the tools we will introduce in this course are:

- Listening deeply to your team members
- Asking powerful questions

The Fundamentals of Organizational Coaching provides an introduction to a few simple tools you can immediately apply. The tools you will learn (and begin to develop) in this class are covered more broadly and deeply in other coach training programs. Additional tools are also introduced in our more advanced training programs.

As you develop each of these skills your personal style of coaching will emerge. As you find your strengths, emphasize those while you also raise your awareness about skills that feel more challenging to you now.

Practice. **Every coaching session you give strengthens your coaching abilities.** Each time you coach, you take a step towards mastery.

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## Section IV

### Lesson I: Listening

Listening is the cornerstone of coaching. **Every other coaching skill is informed by listening.** Through listening, you can ask direct questions born out of your curiosity. When you listen, you can respond appropriately to what your team members say and don't say.

The single most important thing a coach can offer their team member is the gift of being fully heard. Think about the times when someone has fully listened to you without trying to "fix it" for you. It is fulfilling and empowering to be heard and understood.

A masterful coach hears it all and learns to discern what is most important. A masterful coach knows how and when to respond to their team member (or not to respond). As a coach, you will develop your listening skills far beyond your current abilities.

When you tune in to your team member you not only hear the words being spoken, but also those words not said. Listen carefully and you sense the spirit behind the words, as well. You pick up subtle changes in tone of voice and energy. You'll naturally learn to read the emotions that carry the words. At the same time, you are aware of your own thoughts, feelings, and the field of sound around you and your team member.

### What to Listen For

There are Five Reference Points for listening in all coaching sessions:

1. Choosing the Destination  
*Where does the team member want to go?*
2. Packing the Bags  
*What do they need with them on this journey?*
3. Anticipating the Hurdles  
*What obstacles may get in the way and how will they move beyond them?*

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4. Finding the Short Cut  
*What is the most direct route to get them where they want to go?*
5. Enjoying the View  
*How has the team member's perspective changed?*

If you are listening closely to your team member and letting your curiosity lead you, your coaching session will have a natural flow that will bring the team member to his or her own solutions with ease. Don't worry about memorizing these reference points. This is just a metaphor for the coaching dialogue. For expanded details on this topic, see *Five Listening Reference Points* in Supplemental Documents.

**If you find yourself doing most of the talking in a coaching session, you may not have listened deeply or long enough.** Remind yourself to connect rather than perform with your team member. If your attention is on what you're going to say next or how to solve their problem, your team member won't get the feeling they have been truly heard and you will miss important cues.

## Action Challenges

### New Coaches

1. Listen to the Coaching Demonstrations. In each session, can you identify where they are going, what they need, what's in the way?

### Established Coaches

1. Think about five coaching sessions with different team members. Play the conversations back in your head. What improvements can you make in your listening skills? What do you notice about what is easy and more difficult for you to hear?
2. Ask yourself: *What story am I telling myself right now?* Separate your thoughts from the team members.

## Section IV

### Lesson II: Delivering Powerful Questions

Listening and asking questions are the dynamic duo in coaching. If you are listening closely to your team member, the most appropriate question for that moment will come naturally to you.

When you truly hear your team member, you'll know what questions to ask and when. You will know when the coachable moment arises and when the energy is right to complete the session. Often, this information comes across in the first few minutes of a session. But you must listen closely to hear it.

Early in the coaching session, ask simple, direct, open-ended questions to help the team member begin thinking and exploring vs. rushing to solutions. **When a coach asks a meaningful question, the team member feels heard and rapport is built between the coach and team member.**

Simple well-placed questions will:

- Open the team member's mind
- Move the team member beyond automatic responses and into their creative process
- Allow the team member to hear his or her own answers out loud. For many, this external processing is critical for growth.
- Focus the team member less on "how to", which can make a team member feel stuck, and more on possibilities.

**The more powerful the question asked, the fewer Questions are needed.** Our role is not to interview our team members, firing question after question, but rather to connect and guide them to their own wisdom, insights and solutions. This co-creative guiding unleashes and offers the ability to deploy and grow inherent capability. At its core, this is functional learning.

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## Open-Ended vs. Closed-Ended Questions

A closed-ended question is one that encourages a short or single-word answer such as yes or no. Most people tend to use closed questions much more than open-ended questions, perhaps because the closed question keeps control of the dialog with the questioner.

An open-ended question turns over control of the dialog, and encourages a full, meaningful answer from the respondent's own perspective. Open-ended questions allow for a spontaneous, unstructured response – which makes them far more useful in coaching.

Occasionally, you'll use a closed-ended question to punctuate something for your team member. But, aim for open-ended questions because they will draw out more details, and more surprises, from your team member.

- **Do you get along with your manager?** is better asked this way...  
**Tell me about your relationship with your manager.**
- **Are you complete with the session?**  
is better asked this way... **Where did you find value in this session?**

## Who? What? When? Where? How?

The most effective type of question to use in coaching is an open-ended question that begins with Who, What, When, Where, or How (or could be rephrased that way). Take a look at these questions. Notice how each one is simple and direct.

- Who do you need to be to reach this goal?
- Who will you ask to help you with this?
- What do you want to take away from coaching today?
- What would you like to have happen now?
- What is your immediate goal or objective?
- What are you willing to change in order to achieve it?

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- What is missing for you right now?
- What new skills, attitudes or knowledge do you need to succeed and grow in this situation?
- When will you make that call?
- When will you feel you have enough?
- Where do you feel stuck?
- Where is your focus now?
- How do you want to proceed from here?
- How did that feel when you said that?
- How much is it costing you to keep that up?
- How would you like to be coached around this issue?

## Why Not Why?

Rarely is it useful to use a why question in coaching. Why do you think that is? It's because why can have an accusatory or defensive tone. Why questions often focus the team member on the problem at hand, rather than solutions. **Why is it so hard to get past this point?** We suggest you train yourself away from using why questions. As you gain experience, you may find the perfect timing for an occasional why question. Otherwise, stick with Who, What, When, Where and How.

## Coming In for a Landing

When you ask a question, listen for how it has landed with the team member. Aim to ask questions that have impact. They might even say: "That's a Good question!" and then take a bit of time to answer. That just means they are thinking it over.

**If you've hit the mark you'll know it because you'll hear a direct response, and sometimes a change in your team member's tone of voice, energy or perspective.**

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Acknowledge any shifts and seize this moment to go deeper into the topic.

## **Action Challenges**

### **New Coaches**

1. Practice transforming closed questions into open ended questions. It's OK to stop yourself... go back and rephrase the question for your team member.
2. Listen for the different types of questions during Coaching Demonstrations.
3. Practice formulating questions and watch how they land in your coaching sessions this week.

### **Established Coaches**

1. Are there standard questions you are using in sessions? Are they impactful? If not, consider tossing out the old standbys and letting your intuition lead you to powerful questions in the moment.

## Section V

# Putting it all Together

“I shall become a master in this art only after a great deal of practice.”  
- **Erich Fromm** -

What happens when we go from the theoretical to real life? That is, when the coach’s playbook turns from X’s and O’s to real human beings with strengths and opportunities for growth? Life gets more complex and the challenge of really changing how we think, act and perform becomes a real world experience rather than a thought or hope. How well we act on opportunities for growth and change is determined by how well we deal with this “game time.”

Thinking about your journey only gets you so far. You have to put your feet on the path and move! The key to developing your Co-Creative Leadership skills is to do it.

## Section V

### Lesson I: Aligning Individual Goals with Organizational Strategy

Coaches (not working within an organization) help individuals move toward the change they see for themselves. Human Capital Coaches and Co-Creative Leaders set their coaching conversations within the context of what is happening in the organization (goals, strategy, change, challenges and opportunities). They clarify how the individual’s goals fit into the big picture. Human Capital Coaches and Co-Creative Leaders align the mission, vision and values of the organization with the individuals supporting it.

The organization’s leadership establishes what’s important.

- **Where are we going?**
- **What are our strategic goals this year?**

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The individual team member being coached determines what personal agenda they want to bring to the coaching session.

- **I want to come up with a plan to increase sales revenue**
- **I want to create a structure for dealing with Joe in accounting.**
- **I want to come up with a new product line for our department.**

The Human Capital Coach/ Co-Creative Leader creates an environment where team members think creatively, shift perspective, struggle and grow. They support team members to **solve their own challenges/create opportunities which are connected to the organizational goals.** The team member's increased capability also contributes to the overall health and strength of the organization stronger.

Coaching sessions can start with the internal team member feeling confused and overwhelmed. Ideally, they end with the team member having clarity of direction and a distinctive next step toward a particular desired outcome that aligns with organizational goals.

**Although growth is the main purpose for coaching, once growth occurs, it creates the possibility for team members to now come up with solutions to their challenges.** This metamorphosis is the team member's win.

Productive conversations are more likely to happen because of the Co-Creative Leader listening, asking powerful questions, responding intuitively, and building strong support systems. While individual growth and development are important, the coaching conversation's impact on the organization is realized when the Co-Creative Leader highlights connections between individual growth, individual goals and alignment with the organizational strategy.

## **Coaching To Strategy**

There are two critical questions that a coach can use to help a team member understand the contextual framework in which his or her group is working.

Those questions are:

- What is important in the big picture (to our unit?)
- How does that influence/change the work of the individual /group?

Team members need to know the relevant answers to these questions in order to be

effective in their role. Part of the role of the Co-Creative Leader is to ascertain if they know the answer or if they are simply having trouble thinking it through and articulating it.

**As a coach, your role will not be to give them the directive version of the answer.** If they are not clear, your role will be to ask where in the organization they can go to help them get clear or what additional information they need to better understand how to integrate the context of the information into their role. From a managerial leadership perspective, this should be to his or her own manager. If that manager is not clear, they should determine together where to go for the information they need. If he or she is the executive leader, revisiting the strategic planning elements of the change may be useful. At times, the Co-Creative Leader may act like a guide for translation – taking executive level perceived platitudes or sweeping statements and working them into an understanding of the team’s work.

At this point in your training, you should be able to understand why and how to use the simple coaching model to support team members as they work through challenges and create opportunities to meet the strategic goals of the organization.

**If you are part of a Leadership Team.** The strategy set by leadership (10 year, 5 year or 2 year strategic plan), can be communicated throughout the organization in a variety of ways. As you recall from the section on neuroscience, when this message is delivered via Command and Control, Top Down Directives and Announcements, very little activity will take place within individual team members. Coaching creates an opportunity for team members to recognize and become aware of how strategy impacts them personally. Ongoing coaching sessions continually reinforce the strategic goals, their relevance to the individual, and gives purpose to action. When coaching is embraced culturally throughout an organization, this level of understanding of what the strategic goals are and the personal engagement of individuals happens system wide.

## Section V

### Lesson II: Taking it Apart- Applying Coaching Skills Outside of a Coaching Session

A coaching conversation is a very specific engagement with defined roles and responsibilities and purpose. However, there are many opportunities to use the skills you have learned in this course OUTSIDE a coaching conversation. **To be clear, when you draw upon your coaching skills outside of a coaching session, you are NOT**

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**COACHING.** You are however leveraging what you know, your talent and your capability.

We want to encourage you to draw upon the skills you use for coaching (listening and asking powerful questions) when they are relevant and helpful. Here are a few examples:

- Hiring (to prospective hire): What about this work do you value?
- Sales (to prospective buyer): How might that impact your organization? What is at stake if you do not make this change?
- Consulting (to client): What is your focus right now? Where are you feeling stuck? What would you be willing to change to make that happen?
- Colleagues: What about this project are you excited about? What's holding you back? What is one change that you could make to impact this situation?
- Team Building: What is a story about our organization/department/product that has moved you? What do you want your legacy to be?
- Board Members: Why did you join this organization? Why would you leave? Why do you stay? (Yes, these are "Why" questions and occasionally there is a time and a place for a "Why" question).
- Planning: How strongly does this event align or fit with the organizational mission? Which of our strategic goals does this (event, project, product) address?
- Partnerships: Are there any "red flags" in considering the (existing/prospective) partnership? Who would be an ideal partner on this project?
- Marketing: What would we do differently the next time? How did we meet our goals/objectives? How will we measure success?

The skills used for coaching can be applied in a variety of ways in your personal life, with organizations where you volunteer and with people with whom you interact on a daily basis. Using your skills regularly will further develop your capability and increase your comfort. Naturally, this will in turn support your capability as a coach. Again, we want to reiterate that using coaching skills and engaging in a co-creative coaching conversation are two distinct activities that complement each other greatly.

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## Section V

### Lesson II: Being an Accountability Partner

Coaches are accountability partners for their team members. If you notice your team member has difficulty accomplishing things, offer to set up a process so the team member can be answerable for their intended goals and actions.

A Co-Creative Leader is not a parent or schoolmaster. As a coach, remain completely unattached to whether your team member accomplishes something or not (Remember, managerially you may be attached to some of the outcomes). At the same time, continually re-direct the team member's attention and energy to what they most want. Give your team members encouragement, praise their accomplishments, help them plan and remove obstacles.

If your team member did not do what they said they would do, simply acknowledge that in one of these ways:

"I noticed you didn't come prepared to our meeting today." "You didn't complete that task as you had intended. Was there something in the way?"

"What is your revised target date for completing that?"

"That task has been carrying over from week to week. What's going on?"

"You've said many times you want to get that off your list. Have you considered delegating it if you cannot put resources into it now?"

At some point in time, you may need to ask a more basic question: "Do you want me to continue to track this with you?"

**Remember, in a Co-Creative relationship, the team member does their own work and is responsible for their own feelings, decisions and actions. Doing your team member's work for them will ultimately dis-empower them and inflate your role.**

Get creative with accountability. Help the team member create rewards, higher stakes and consequences related to their goals.

You may also encounter a situation where as a coach you need to help the team member address accountability issues with others in the organization. For example, your team member may need to ask for clarification from a manager that is not his or her direct

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manager. That requires the team member to communicate outside his or her direct line of communication.

Helping the team member think through this cross-functional communication requires clarity and recognition of what each individual is accountable for in achieving the goal. In another example, your team member may need to work with a co-worker to address issues that affect both of their work. Your team member is accountable for his or her individual work, but in these cases, they are also accountable for working with others to gain clarity. Helping your team member achieve clarity is some of the most important work you will do as a Co-Creative Leader.

## Strategic Planning

What makes a plan strategic is partly the integration of the whole picture:

1. What are the team member's current values, strengths and knowledge base?
2. Who do they want to become?
3. What new skills or knowledge are needed?
4. What are the short-term and long-term goals and how do they relate?

While team members may present short-term goals as their focus for coaching, check in with them about long-term goals. As a Co-Creative Leader, your accountability is to align your individual team member's capability and passion with organizational strategic needs. **Ask your team member how these accomplishments will move them towards something bigger in the future.** Perhaps they want to become a recognized industry speaker, or a high-level executive. Get them thinking now about where all of this is taking them. A long-term objective will be an attractive incentive for staying on track with their short-term goals.

Help team members integrate the smaller goals into a long-range plan. Even if the details are a bit fuzzy for now, it makes a difference to get all the energy moving toward one long-range direction.

Your team members will usually ask you to assist them with specific goals in mind, but they might not have thought them through. Spend some time in the first few sessions honing these into SMART Goals and connect the smaller goals with long term

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goals and align the work within the context of the BIG PICTURE.

Any plan or goal should be:

- Specific
- Measurable
- Achievable
- Risky (require taking some risk)
- Time Limited

## Section V Lesson III: How to Excel at Coaching

“Do or do not. There is no try.”  
- **Yoda, Star Wars** -

When does a musician become a virtuoso? When does a conductor become a maestro?  
When does a painter become a master?

In every craft there is an invisible line crossed where the artist goes from good to great, from excellent to sublime. Leadership is no different. The Fundamentals of Organizational Coaching is designed to lay down the foundations of your learning.

Now is the time to pull together all that you have been exposed to and put these basic skills into practice. No doubt you’ve experienced a mix of emotions – excitement, anticipation, questioning and satisfaction. This is all expected and normal. You’re learning to be comfortable with traveling into the unknown – this is where growth occurs – seeking knowledge, experience and building behaviors.

- Practice, Practice, Practice
- Practice skills individually, Practice Coaching holistically
- Check your Techniques (record, review, use a checklist)
- Listen to the Coaching Demonstrations included in this course
- Review Coaching Transcripts
- Have someone else critique your session

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Co-Creative Leadership is a practice and something at which you will be consistently improving. Your coaching skills, the tools you choose to use and the style you develop will be revised, reformed, and refined over time. These resources are available to you when you are ready for them.

From this training, you should have a solid understanding what coaching is and have started to develop basic skills to impact your organization. You can immediately apply the skills acquired during The Fundamentals of Organizational Coaching.

## Next Steps

**We invite you to consider enrolling in a live coach training program where you will practice and hone your coaching skills** in a live group setting under the guidance of experienced mentor coaches.

Go deeper in your learning. Build upon what you already know and add to your set of skills. Collaborate in a group setting under the guidance of experienced mentor coaches who will provide constructive feedback and help you improve your ability to coach. Learn from others as they develop their capability and confidence as coaches.

## For Individuals

- **Human Capital Coaching**- For individuals who want to implement a coaching culture at their organization. Work with a team to create and implement a coaching culture at your organization. Internal Coach, VPHR, HR Business partners, Talent Specialists, Training & Development.
- **Core Coaching for Effective Change**- For individuals looking to practice and develop their coaching skills. It is not enough to understand what coaching is; collaborate in a group setting under the guidance of experienced mentor coaches who will provide constructive feedback and help you become a capable confident coach.
- **Certified Coach Program**- For individuals looking to develop coaching skills and also want support developing a business plan and marketing strategy to run their own business as a stand-alone professional coach.

## Enterprise Solutions

- **Custom Workshops**- Live and on-demand programs to develop manager as coach, leader as coach and introduce coaching.
- **Co-Creative Leadership**- Collaborate in a group setting with peers from your organization to develop coaching skills. Focus on your organization's key

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initiatives and goals and how to communicate that strategy and coach managers to step into their roles. Ideal for teams of leaders, emerging leaders and management teams. An experienced mentor coach will guide your team through a customized and co-branded experience.

Whether you are integrating coaching into your leadership role, functioning as an Internal Coach, leading custom workshops and trainings to leverage managers-as-coach or implementing a companywide top-down coaching culture, Coach Training Alliance will be there to support you every step of the way.

Congratulations on taking the first step. You are now in a perfect position to leverage your professional strengths. Use your gifts and this knowledge to drive the human capital of your organization to greater productivity, greater contentment and greater individual and collective possibility.

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# Supplemental Documents

These accompanying materials enhance learning and comprehension. They are critical to your training and should be included in your studies for each lesson. You will find in-depth explanations of concepts, exercises and templates that are designed to increase understanding and ease implementation.

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# SD1

## Human Capital...Why We Use the Term

“If you can't beat 'em, let them change their mindset through experience.”

When I sat down to develop a coach training program for organizations, my inspiration came from the power witnessed in Coach Training Alliance's Accelerator program and its accompanying training course. The Accelerator is about learning and, throughout, an unstated but embedded value of “trust.” I really believed that a proven skill set that brought forward growth in an environment of trust was the secret recipe to what so many organizations strive for – greater employee engagement, lower turnover, cross functional communication, clearer communication and greater performance. So we created the Human Capital Coaching program to achieve these outcomes. BUT...

The Human Capital Coaching program was created to make organizations more human. That is to say, we wanted to unleash the power of coaching and get away from directive driven and policy dependent execution of change and growth management techniques. Human Capital Coaching is a more humane (and more effective) way to lead change. Better results were a desired outcome, but higher functioning growth enabled teams is really what we are after.

Why then do we use an arguably “hard” term like Human Capital? There are two reasons.

First, we are trying to address and shift the mindset of the data overloaded and financially driven leader. In coaching vernacular, we are meeting them where they are. Imagine if leaders were required to spend as much time and discipline on their human capital as they do running other components of their business in terms of planning, resourcing, monitoring and decision making. In today's economy, most companies' single largest asset and most consistent investment (cost) in what they do is their people. Yet rather than be classified and treated as such, human capital investment typically gets put in its own box and while often lauded as important – it just doesn't get the priority other parts of operations do. There is some false embedded belief that these investments have some optionality.

Second, we do not see organizational coaching as “soft skills” training. To the contrary, we view it as critical skills used to grow and manage a team to insure they are capable, engaged and challenged in a manner that insures they feel valued individually, as a

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team and as a group. We know pay is the last resort for attraction and retention of talent. Talent seeks growth and valued added management long before compensation. This training, and the behavior it fosters, is similar to investments in the IT system on which your business depends. It is not optional, it is critically necessary and deserves a priority and a budget category that demands both maintenance and growth levels of capital (investment spending). We call it human capital not because we see people in capital terms but rather we understand that capital is fluid and human capital is *THE* critical piece to the components of success in building *sustained* organizational capability, brand equity and value.

Human Capital Coaching pays for itself in higher levels of productivity through alignment, the velocity of change execution and lower levels of turnover. Simply put, it grows and unleashes capability. Important humanistic tools are lauded for their results – engagement initiatives, survey work, career planning, employee forums, etc. These are the tactics of the leader seeking fixes and optics of doing the right things. Human Capital Coaching is the strategic toolset that makes well-intentioned tactics do what they are intended to do – build and sustain great teams of rewarded people.

One of the more effective ways to afford a client the ability to grow is to first meet them where they are and then use the power of what they already know to drive a shift in behavior. With Human Capital's name, we do just that.

Chris Osborn  
Chief Executive Officer + Coach

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## SD 2

# Coach plus Leader: The Mindset, Integration and Leadership of Coaching

The Human Capital Coaching program is about unleashing a leadership quality you likely already have but have yet to develop – coaching. Coaching is a leadership tool or set of tools that you can access when needed or appropriate. Like so much in life, “coaching” as a term is handicapped by its broad use. What we imagine or have experienced as “coaching” rarely is what professional coaches would call coaching. As such, many people entering coach training believe they are going to merely adjust the coaching they are already doing. Human Capital Coaching intends to dispel that notion quickly. Critical to the success of mastering coaching skills is a strong foundational understanding of what coaching is – a co-creative process that moves the agenda and accountability away from the leader and onto the team or individual being coached. Proper coaching accomplishes this in a very positive and growth minded process.

The Human Capital Coaching curriculum is intentionally written to address you as a coach. It is not that we do not recognize that you are a leader, an executive, a manager or consultant. The intention is to insure that you, as a student, are challenged to develop the mindset of a coach. With respect to human change and performance at both the individual and organizational level mindset is critical. We have learned from neuroscience that a specific mindset, that is, a focus, creates the pathway to growth and success. Once this pathway of new behavior (in this case “coaching”) is established through practice and focus, a habit is developed. This habit of new foundational behavior affords you the ability to now integrate this “coaching” into your other work as a leader. You now have a pure place from which to draw coaching’s power. In addition, you will have the understanding to establish a context for this skill set’s application and as such the ability to integrate it with all else you do as you lead change.

An analogy might be that of a great athlete looking to successfully compete in a triathlon. They are able to run, bike and to some basic extent swim. However, they have never had to swim a distance as great as the race presents, let alone in an environment like that of the race. To become a more successful triathlete, they first must become a stronger and more competent swimmer. This may require re-framing the basics of recreational swimming into

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a competitive context by swimming new drills, trying new strokes and practicing swimming for the sake of swimming. Once this baseline of capability is established, it can now be applied within the definitional goal of the triathlon. You are now a better triathlete. The process of coaching mastery is no different. Once you have the basic mastery of coaching functionally understood, you will be a better overall leader.

To help you when you will naturally wonder... “why is this talking to me like a professional coach, I am a (your role) who wants to learn about coaching?” we provide the following:

*When the Human Capital Coaching curriculum addresses you as a “coach,” think of yourself as if you are a professional coach. Recall the mindset of a coach and its requirements (which we will cover in great length).*

*When the curriculum says “client,” think of the mission and purpose of your organization. Although you are working with individuals, it is the **organization** that is the client.*

*When the curriculum says “team member,” think of the individual, your subordinate, your peer or the team members who rely on your leadership.*

These simple mindset-framing steps will allow your actions to become more natural and thus more effective as you grow your coaching skills and your resulting leadership capabilities. Coaching skills are never the only tools on the belt, just some of the more critical ones to insuring growth and success of your team.

Chris Osborn  
Chief Executive Officer+ Coach  
Coach Training Alliance

# SD 3

## When to Coach vs. Be Directive

### WHEN is Coaching appropriate?

<u>When to be DIRECTIVE</u>	<u>When to COACH</u>
Specific Outcome and Path	Open to possibilities
Training on procedures	Unsure of what to do next
No time for consensus	Indecision / Uncertainty
New staff orientation	Blocks in planning

### WHAT are you focused on?

<u>Focus is the System</u>	<u>Focus is the Person</u>
Functionality	Opportunities
Operations (process, rules)	Growth
Clarifying the departments Objective	Possibilities
Procedures	Developing Competency

### HOW do you begin the conversation?

<u>Manage/ Direct</u>	<u>Coach/Collaborate</u>
Provide answers / Give opinion	Ask Open-Ended Questions
Telling, Showing	Listen, Mirror, Reframe
Command and Control	Shift perspectives
Stating Required Outcome	Explore possibilities
Clarifying expectations	Schedule Time together
Reacting to an Event	Prepare for action/discussion

### EXPERIENCE (End User, Employee)

<u>Compliant</u>	<u>Engaged</u>
Follow orders	Think
Execute	Plan
Dependent	Developing Competence
Being told what to do	Creating a path / Empowered
Abiding by rules	Deciding for themselves

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# SD 4

## Group Coaching

Group coaching is a special format where you create live opportunities for individuals to gather and experience coaching within a group.

Distinct from a seminar or workshop, which is information based and focused on delivering content, group coaching is focused on providing space for group creativity and synergy – the coalescing energies that create an inspiring experience for each individual. The whole is greater than the sum of its parts. No doubt you’ve experienced this for yourself.

### **Why Group Coaching Works for You and Your Internal Team Members**

Group coaching is a fun and meaningful experience for both you and your team members. Adding this to your Co-Creative Leadership allows you to:

1. **Leverage your time** – because you are serving many people at the same time.
2. **Expand the awareness of an agenda in a shorter time** – group coaching allows you to increase the awareness of your program across groups within an organization. People talk and want to be part of a group that is “going places” and evidencing leadership.
3. **Enhance your skills** – holding growth space for many people at once builds new strength in coaching skills and increased awareness.

Team members will enjoy a different set of benefits than those of one-to-one coaching:

1. **Richness in diversity** – groups are inter-developmental, providing participants with a richer experience because of the diverse energy and ideas. Each member’s unique voice and perspective is honored.
2. **More “aha” moments** – each member’s issues, insights and solutions are high-lighted with brilliant clarity because their own experience is witnessed, triggered and mirrored by other members in the group.

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3. **Collective wisdom** – members come to trust and respect the enhanced wisdom that emerges from a well-facilitated and committed group.
4. **Accelerated growth** – members may progress faster, learn more deeply, and derive more joy from the journey. Human learning is highly co-creative – one person’s growth often is shared and feeds another’s. Actively witnessing growth beats hearing about it the next day or second hand.
5. **Safety in numbers** – the group coaching community provides a safe place to stretch and develop both personally and professionally. The sense of isolation and loneliness can drop away and be replaced with a sense of belonging.

You can see there are many advantages to both you and your team members when you offer group coaching. Your role is not just a facilitator. You are an agent of change – growing opportunity for the possibilities for each member of the group and the group as a whole.

### ***Four Types of Coaching Group Structures***

1. **Interdepartmental Groups** include people who all work for **the same executive leader** *within the organization* such as a group for:
  - Executive Manager deepening leadership skills and defining leadership roles
  - Managers of teams building management skills and improving creative problem solving
  - Team members who are focused on a specific project
2. **Affiliated Groups** are made up of people in the same company who do not interact on a daily basis, and have similar issues, such as:
  - Finance personnel
  - Analysts
  - Administrative Assistants

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3. Affinity Groups are made up of like-minded people in the same circumstance, such as:
  - Parents with special needs children needing support in the workplace
  - Newly promoted managers
  - Wellness groups
  
4. Focus Groups are made up of people who share the same desired outcome, such as:
  - Working on a project together
  - Growing a new department
  - Crafting marketing materials Innovation teams

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## SD 5

# The Picture of Your Human Capital Coaching Practice

Before going on a vacation, you choose a destination, do a little research, make plans and begin to visualize what it will be like. You prepare mentally for your journey. You're beginning an important journey into coaching now, so before you get too far, think about where you want to go.

Write a page or more about what your Human Capital Coaching practice will look and feel like. Paint a detailed picture by writing about it in the present tense, as though it were already happening.

**Keep in mind, this picture of your practice is just the first draft. You probably do not have all the answers now.** Come back to this now and then to refine the picture of your practice as you know more. When you gain actual experience coaching team members that will help you understand much more of what you want your coaching practice to look and feel like, as well as who you want to work with.

Open your mind and do some possibility thinking. Expand it out! The more you know about what you want, the easier it is to recognize it when you've created it.

Begin by answering these questions:

1. How can I support my organization through coaching?
2. What other work do I have that will affect my coaching practice?
3. Where will coaching take place? Does my office provide a confidential space? Is my office the best place to meet with my team members?
4. Will I offer coaching by phone, in person, or both?
5. What are the different ways that I want to work with team members? (One-to-one, Group Coaching, etc.)
6. What is my strength in the organization? How do people "know" me?
7. Will I coach as part of my existing role? Is this part of a formal coaching initiative or an informal shift? Will this be a pilot program, formal launch or something in between?
8. What are some ideas I have so far about how will I introduce coaching to my team members?

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## SD 6

# Your Co-Creative Leadership Statement

Your Co-Creative Leadership Statement is the first sentence you say out loud when describing to people what you do as a Co-Creative Leader and Human Capital Coach.

Your statement is the critical first piece of your internal branding and role communication as a Co-Creative Leader. It is the centerpiece, or hub of your internal marketing of the resources you have to offer your team. It's the articulation of your intention as a leader looking to build capability. Take the time to develop your Statement and then use it! And it's okay if you change it later. You'll want to as you learn more about your internal team members and coaching opportunities within their growth.

Consider your statement a *value proposition*.

If you simply say that you that you are a Human Capital Coach and then tout the virtues of coaching, team members will likely smile, but quickly disengage interest. Similarly, **broad lofty statements like this won't engage your organization or team members:**

- I help people have a more fulfilling and productive career!

Why won't this engage team members? It's abstract and non-specific; it's meant for no one in particular; it isn't compelling enough to inspire action.

A Leadership Statement is not:

- About you
- About the features or virtues of coaching

In fact, it doesn't mention coaching at all. Surprised? Instead, your Leadership Statement is a single sentence that specifically conveys:

- **Who** you work with, and the
- **Benefits** they receive from working with you.

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Your Statement is all about getting early team members engaged. That's why it's helpful to de-fine your mission and align that mission with what the team members really want and builds capability. The more of a generalist you position yourself as, the more difficult it will be for you to craft a compelling Statement.

Powerful Leadership Statements:

- Are simple, direct and specific
- Use a maximum of 25 words
- Are written in non-formal, conversational language
- Provide a clear solution to your organization's most urgent challenge or goal
- Do not contain technical babble, jargon, or legalese

Take a look at the following benefit Statements for other types of service providers.

For a Financial Planner:

- I help families reach financial independence on their current salaries.

The statement above is succinct and all about something the market really wants. This is so much more compelling than a statement like the one below, which focuses on the service provider, rather than his market.

- I am a financial planner and I represent more than thirty quality investment vehicles. My specialties are optimized annuities with automatic annual rollover and short and long term debentures.

Boring!

Here are two more statements that really rock:

For a Publishing Consultant:

- I help people get their book out of their head and onto bookshelves.

What's great about this statement is the way it describes going from a challenge – the book out of the head, to the desired outcome – onto bookshelves. Ultimate success is implied.

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For a Marriage Counselor:

- I help couples find a safe place to love.

This Statement is so punchy because it's so short. The challenge – finding a safe place to love – is also the desired outcome.

In each of these Statements above, notice the clarity of the populations served and the specific benefits they receive.

Now take a look at statements for coaches with various niches:

- I help women executives reach financial freedom by transforming their relationship to money.

Notice that even though the coach is focusing on women executives as her target team members she is not saying she's going to help them be better executives. Instead, she's targeting this group with a very specific specialty – helping them attain financial freedom. If you have a special set of skills, you too might opt for a specialty and target a group of team members who would most benefit from that specialty.

- I help college administrators make significant contributions to their institution by matching their strengths to their best opportunities.

This coach has drilled down to a narrow group – college administrators – but see how a Co-Creative Leader could easily help people in this group use their strengths to accomplish some-thing very key for them?

- I help sales managers create an inspired sales force and bring in their most profit-able year yet.

For this target team member group, the Co-Creative Leader has zoomed in on the single most challenging aspect of a sales manager's job. Can you imagine how a coach would help people in this niche create an inspired sales force? Remember, coaching is all about drawing the wisdom from the team member. You do not have to know more than your team members.

To create a powerful Leadership Statement:

1. Choose your mission. Come up with a brief description for the group you serve = WHO

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2. Describe the most compelling and specific challenge plus the desired outcome for that particular group = BENEFIT. Sometimes the outcome implies the challenge.
3. Put this together in a succinct sentence of about 15 – 25 words.
  - Use syntax that is easy-to-read and understand – the fewer prepositional phrases used, the better.
  - Eliminate formal phrasing or unnecessary words.
  - Choose words and phrases for their impact and clarity.
  - Avoid poetic language or abstract concepts.
  - If you can, use metaphors.

#### Leadership Statement Sentence Structure

- I help (WHO) to (WHAT) .

What's wrong with the following example?

- I help people in transition (niche not narrow or specific enough) to achieve balance and follow their dreams (abstract and non-specific).

It's time to make a strong statement about how your team members benefit from your leadership and coaching.

As you develop your Leadership Statement, remember that:

1. Everything you create in your leadership practice is an ever-evolving work in progress (like your organization and team members). It is not written in stone. It's best to craft one now and improve upon it by using it in the real world, then tweak it as you learn more about your mission.
2. Your goal is to have clarity of your role (what you do for who) in a way that will have your team members paying attention and asking for more information or engaging in next steps with you.
3. Think of it as an stated intention or personal brand promise of your leadership.

## Steps to Craft Your Statement

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3. Does it give me several great ideas about where I can find my future team members and how I can grow them co-creatively?

If you answer 'no' to any of the above, go back and hone the WHO and WHAT further.

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# SD 7

## SMART Goals

When you want something new to happen in your life, commit to make it happen. Do whatever it takes to bring the result you want.

You've made the commitment to enroll in a comprehensive coach training program to enhance your leadership capabilities. Now, it is time to commit to the steps that will bring you a successful practice of leadership using coaching. Have some fun creating SMART goals. Don't allow questions of "how?" or self-doubt to stop you from setting the goals that will get you where you want to go.

Every SMART goal has each of these five elements. SMART goals are:

- Specific
- Measurable
- Achievable
- Risking (require taking some balanced risk)
- Time Limited

### How to Set Goals That Are S-M-A-R-T

Create a minimum of three and a maximum of ten SMART Goals that you want to accomplish in the next 6 months, so that you will achieve what you intend from this program.

Examples of 10 SMART goals:

- Give 20 consultations in the coming quarter
- Meet with the CEO in the next 30 days
- Develop an organizational chart by Week 2
- Align coaching program with project management office by week 4
- Join the local ICF Chapter by Week 3
- Interview people in other organizations serving our market by Week 10

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- Offer Group Coaching to sales department by Week 12
- Design a Workshop for all Level 3 Managers by Week 13

## **Bite Size Goals**

After you put your SMART goals together, delineate them into smaller “bite size” goals to support your ability to accomplish them. Use this same structure with the team members you coach. Remember, frame the context and purpose of the SMART goals with how they tie into the overall big-picture of what is happening in the organization. This will bring purpose to action. Each Bite Sized goal and regular sized SMART goal should be aligned with the mission, vision and/or values of the organization.



# SD 8

## Five Listening Reference Points

For every agenda your team member presents, there are five points of reference to listen for throughout the session:

1. Choosing the Destination  
*Where does the team member want to go?*
2. Packing the Bags  
**What do they need with them on this journey?**
3. Anticipating the Hurdles  
**What obstacles may get in the way and how will they move beyond them?**
4. Finding the Short Cut  
**What is the most direct route to get them where they want to go?**
5. Enjoying the View  
**How has the team member's perspective changed?**

### Choosing the Destination

#### ***Where does the team member want to go?***

Listen for the team member's current challenges or goals. This relates to Step 1 of the Simple Coaching Model - Clarifying the Agenda. Make sure you hear the topic, details and takeaway directly from the team member. This will set the main focus for the session and tell you how they want to be coached. If their agenda is not crystal clear to you, ask questions until you fully understand what they want. This is the most critical step in any session. Do not proceed into the session until you have clarity of focus.

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## **Packing the Bags**

### ***What do they need with them on this journey?***

Listen for what is missing for the team member. This and the next two reference points relate to Step 2 of the Simple Coaching Model – the Coachable Moment. Do they need perspective, options, confidence, skills, support, energy, ideas or a plan? They may need several of these during the session. Remember, your role is not to supply what your team member needs but rather catalyze them toward their own solutions.

Coaching assumes that the team member already has access to the resources they need within them to reach their destination. Offering your own perspectives and ideas might help to open your team member's mind. Own that it is your perspective and know that it might not be the “right” one for your team member. Encourage them to brainstorm.

## **Anticipating the Hurdles**

### ***What obstacles may get in the way and how will they move beyond them?***

Listen for current or possible pitfalls, stumbling blocks, resistance, doubts and fears. Assist your team member in putting these things into proper perspective and moving into action. Often that requires changing focus and re-commitment to goals. Fears and doubts are often like cardboard walls without real substance. Encourage your team member to trust their ability to move right through them. Sometimes a session will move back and forth between reference points 2 and 3 a few times. (What is the obstacle? And what resources or support do you need to help you move through that obstacle?)

## **Finding the Short Cut**

### ***What is the most direct route to get them where they want to go?***

Listen for possible solutions. Team members will almost always give you clues to their own solutions. Help them to see the merit in their own ideas so that they can buy in. Endorse them.

Appreciate them for their intelligence, creativity, and wisdom when you see it.

## Enjoying the View

### ***How has the team member's perspective changed?***

Listen for the upbeat in the session. This reference point relates to Step 3 and 4 of the Simple Coaching Model – Invite the Shift and Acknowledge when your team member has successfully opened their mind and generated energy toward their goals. Endorse your team member for their new perspectives and awareness. If they don't come to it on their own, make a coach request that supports their next step or a strong point of inquiry to deepen the process. End the session by asking them to share what of value they received from the session. Even if there's still time in the session, end on an upbeat rather than take on a new agenda with too little time to explore it.

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## SD 9

# Clarifying the Coach's Role

What is the coach's role in setting context? The coach is an unattached thinking and accountability partner. The coach is responsible for:

- Setting appropriate boundaries and policies.
- Letting the team member determine the agenda for sessions.
- Listening to the team member on multiple levels continually.
- Asking powerful, direct questions.
- Genuinely appreciating, endorsing, and supporting the team member.
- Taking the risk to be wrong rather than holding back important truths.
- Assisting with setting goals, planning and strategizing.
- Offering perspectives, options, and suggestions to raise awareness and catalyze the team member's own solutions.
- Making powerful requests to deepen the team member's process between sessions.
- Upholding the highest professional standards and ethical guidelines. This is a critical component of building and maintaining trust.

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# SD 10

## Introducing Coaching to your Team:

Create a document that sets up the co-creative relationship with your internal team members. Through this document, you will tell the internal staff the following:

- Purpose of coaching
- How coaching works
- What the Co-Creative Leader does in coaching
- What is expected from the team member
- What the Co-Creative Leader doesn't do in coaching
- How the coaching links to overall strategic objectives
- How success will be defined
- Coaching session preparation forms
- List of questions or team member survey

### Sample Communication:

#### **HOW WE WILL WORK TOGETHER**

Welcome to our internal coaching program. It's an honor to be your internal coach and I look forward to working with you.

The relationship between an internal coach and team member is Co-Creative, meaning that we are equals and both have an active role. I am not a therapist, counselor or consultant. I am a trained coach using honed communication skills to support you as a detached thinking partner. Together we create more power for you to effect meaningful change and take dynamic actions towards your goals. Our coaching program allows you the opportunity for personal and professional growth and helps serve the mission, vision and values of ABC Company. Coaching is about

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helping you with what you can and want to achieve.

### **Your Role**

- Please arrive to every session on time with a topic that relates back to your at our organization.
- Come to your session centered and ready to engage. You will be expected to explore possibilities and show curiosity. There are no right or wrong answers. Please be prepared to think (out loud) about some of the questions I propose.
- Give me feedback in the moment about your coaching experience – what works, as well as what does not.

### **My Role**

- I will listen closely to you, respond to what I hear and ask questions. If I'm not on target, just tell me. I'm not attached to being right.
- At the end of the session, if you do not mention what actions you are ready to take, I will make a coach request. I will ask you to stretch yourself, deepen the work done in the sessions by writing, taking some action, resolving relationships or things that feel incomplete.

### **Confidentiality**

This topic cannot be overlooked or understated as we begin our working relationship. As the coach, I will maintain the strictest levels of confidentiality with the information you share with me. Prior to beginning our work, we will have a clear agreement about how coaching information will be exchanged among me, you and our sponsor.

### **Extra Time**

Between sessions, if you have questions, a brief update, or want to bounce some ideas around, please contact me by phone or email. Please keep these contacts succinct. If it seems like it will be better served as session material, I'll suggest that.

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## **Ways You Can Get More From Your Coaching Experience**

- Make our coaching session a priority. Come to every session with a specific agenda – a clear understanding of what you'd like to take away from the session.
- Do your own work between sessions. Use what you learn. Complete what you agree to do.
- Be open-minded. Try new approaches. Experiment.
- Be willing to change your beliefs and patterns if they do not serve you anymore.

### **Schedule Changes/Vacation/Business Trips**

We will choose a regular time for our sessions. This will be your time slot. If something must change temporarily or permanently, I will be happy to work that out with you.

Please give our call high priority and arrange your schedule to honor our agreed upon time. If you must reschedule our session, I ask you to give me 24 hours notice. In any case, let me know as soon as you are able. If you have vacation or business trips that will conflict with our sessions, please notify me of these as soon as you have an itinerary and we will discuss when to reschedule. I will do the same with you when I plan trips.

I'm Looking Forward To Our Coaching Relationship!

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## SD 11

# Your Co-Creative Leadership Style

When you feel passionate about something, you immerse yourself into it, mind, body and spirit. You find a way to make it your own, to bring your own style to it.

Think about a leader you respect or your favorite celebrity. The quality of their work and presence in the world is singular, distinctive and authentic. Some people become famous for a way of being, but what's more important is that they know for themselves what sets them apart or what makes their work theirs.

Put a personal touch on your coaching. Bring yourself fully into this field. If you want, become known for a certain style. Let your coaching be defined by who you are.

Below are a few anecdotes from experienced coaches about their personal coaching magic. These aren't used in marketing necessarily, but express the personalized approach each coach takes to working with coaching team members.

In the beginning of the coaching partnership, I work with my team members to create their Vision. Everything we do after that is a reflection of that Vision. It becomes our point of reference. As they define and work through their goals and actions, any resistance or obstacles are managed by referring back to their Vision. Each step they take in any area of their lives is vision centered. This keeps my team members focused on moving toward what they want in their lives. They create momentum quickly and experience lasting, sustainable results from the coaching process.

**- Laurie Cameron -  
Coach-Speaker-Catalyst**

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Our bodies have an amazing intelligence that is comparable in depth, wisdom, and power to that which we access through our brain. During a coaching conversation, I often check with my body to see what it feels, at a very visceral level, about the team member's concerns, breakdowns, or opportunities. Does it feel tense, relaxed, heavy, light, balanced, fluid, expansive, restrained, etc.? Most of the time, the body knows the answer, the best decision, the right question to ask, or an area to focus in the conversation before the brain does.

**- Eddie Marmol -  
Master Coach**

I believe in people. I find their intelligence and wisdom to be vast and awesome. In every session, I look for my team member's brilliance and reflect it back to them, to show them who they've become and the seed of who they most want to be. When they see it for themselves, it's as if their heart grows larger. Their ideas and beliefs become more expansive. Their actions are far reaching. And their results are better than they ever thought they could be.

**- Rhonda Hess -  
Coaching Business Success Strategist**

Expectations are amazing things. I expect my team members will exceed their goals and hold that intention for them throughout the coaching relationship. When they first establish their objectives I nudge them to set "the bar" higher, just beyond their perceived capabilities. Even if they miss the elevated mark they exceed their original expectation of success. This allows us to set the bar even higher the next time with increased confidence and momentum.

**- Will Craig, MA -  
Knowledge Guide & Coach Training Alliance Founder**

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# SD 12

## Return on Investment

- According to Manchester Inc., a Florida-based coaching firm, investments in coaching were found to **yield an average return on investment (ROI) of almost six times the cost of the coaching** (Jan. 2001, HR.com)
- A MetrixGlobal LLC study (for a Fortune 500 firm and Pyramid Resource Group) found that **“Coaching produced a 529% return on investment and significant intangible benefits to business. Including the financial benefits from employee retention boosted the overall ROI to 788%.”**
- AIG completed an ROI assessment on coaching in 2007 and found a **ROI of 17:1**. “Retention and engagement were significantly impacted at multiple levels. Senior leaders were effective internal coaches with ... training.” AIG Retirement Services 2007.
- “Google recently completed an exhaustive study and found of the eight keys to managerial leadership success- **strong coaching skills ranked #1.**” New York Times, March 2011.
- Nations Hotel implemented organizational coaching and **ROI was calculated at 221%**. Benefits Cost Ratio (BCR) was calculated at 3.21. “One of the most important aspects of the process involved making sure that the engagement was connected to a business need. Typical coaching engagements focused on behavioral issues (e.g., an executive’s inability to listen to employees). To connect to the business impact, the behavior change must link to a business consequence. ROI Institute, 2007.”
- A recent study cited in the prestigious Public Personnel Management Journal found a typical management training program increased the manager’s productivity by 22%, but **when combined with Coaching, the manager’s productivity exploded to more than 85%**
- An Olivero, Bane & Kopermann study (1997) of a public sector municipal agency found that **coaching with leadership training resulted in a near quadrupling of productivity results (from 22.4% to 88% when combined)**.

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- Toyota Leadership. Managers understand that, *"improving actual operations was not his job – it was the job of the workers themselves. His role was to help them understand that responsibility and enable them to carry it out."* Learning to Lead at Toyota, Harvard Business Review 2004.
- The *objectivity* that a coach brings to a developmental opportunity is helpful to managers seeking to make difficult changes in attitudes, work habits, perspectives and interpersonal relationships (McCauley & Hugh-James; Young & Dixon, 1996.)
- According to Personal Decisions International, a Minneapolis-based human resources consulting firm, **70% of the top 1,000 firms worldwide use some form of executive coaching** (Source: HR.com, author Ann Vincola, President of a quality of life issues consulting firm, 2000)
- "The goal of coaching is the goal of good management: and that is - to make the most of an organization's valuable resources." -- *Harvard Business Review*

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