

Illustrative Coaching Plan: General Leadership Coaching

Session	Topic/Activity
1. Orientation/Set Up	<ul style="list-style-type: none"> ▶ Reconfirm goals and ground rules, if appropriate. ▶ Set up off-the-shelf assessment (e.g., ProfileXT, Hogan, DiSC). ▶ Set up baseline online 360 for baseline competency assessment (e.g., Checkpoint360, Genos EI Assessment). ▶ Introduce Leader’s Dashboard or other Development Planning tool. ▶ Identify participants to be interviewed for confidential verbal 360. ▶ (And start with high-level coaching if it makes sense).
Between Initial Session and Session 2	<ul style="list-style-type: none"> ▶ Complete off-the-shelf assessment. ▶ Complete online 360. ▶ Complete Leader’s Dashboard or other Development Planning tool. ▶ Coach interviews participants for verbal 360.
2 (and perhaps 3 and 4). Assessment Review Sessions. Due to the amount of information to cover, this work can require two or even three sessions.	<ul style="list-style-type: none"> ▶ Review off-the-shelf assessment. ▶ Review online 360. ▶ Review Leader’s Dashboard. ▶ Review verbal 360. ▶ Use the information to further refine the coaching plan, including the behavioral coaching process when appropriate. Goal: Find the one behavior or area that will have maximum impact.
After or Even During Assessment Phase – Sessions 3+	<ul style="list-style-type: none"> ▶ Coaching begins. Emphasis is on: <ul style="list-style-type: none"> ▶ Creating new behavior/behavioral coaching (notes/feedback process); ▶ Current issues related to overall engagement and client’s goals (specific people and situations); and ▶ Occasional review and update of leader’s dashboard/development plan. ▶ Where behavioral coaching is being used: At end of every month, client receives feedback/data about behavior change and discusses with coach.
Approximately every 3 months (per agreement with client)	<ul style="list-style-type: none"> ▶ Conduct review of coaching with client and any sponsor. Note: Client and coach write any reports for sponsor together. No confidentiality is breached. Client should attend any meeting. The client and sponsor should be discussing where results are showing up in the organization and any course corrections for coaching.
Approximately every 6 months (as appropriate)	<ul style="list-style-type: none"> ▶ Conduct second online 360 to confirm results, and/or 360 verbal to confirm results and identify new opportunities for coaching.

Optional: As time permits, for leaders that might not have had formal leadership training, include a curriculum based on desired toolkit or other topics.

Illustrative Coaching Plan: Group Coaching (charge less, make more)

Session	Topic/Activity
1. Orientation/Set Up	<ul style="list-style-type: none"> ▶ Reconfirm goals and ground rules, if appropriate. Include individual and group initiatives/projects as applicable. ▶ Set up off-the-shelf assessment (e.g., ProfileXT), Hogan, DiSC). ▶ Set up baseline online 360 for baseline competency assessment (e.g., Checkpoint360, Genos EI Assessment). ▶ Introduce Leader’s Dashboard or other Development Planning tool. ▶ Identify participants to be interviewed for verbal 360, if appropriate. ▶ (And start with high-level coaching if it makes sense).
Between Initial Session and Session 2	<ul style="list-style-type: none"> ▶ Complete off-the-shelf assessment. ▶ Complete online 360. ▶ Complete Leader’s Dashboard or other Development Planning tool. ▶ Each client interviews participants for verbal 360, after coaching on how to receive advice/feedback.
2 (and perhaps 3 and 4). Assessment Review Sessions. Due to the amount of information to cover, this work can require two or even three sessions.	<ul style="list-style-type: none"> ▶ Determine which information is best handled individually, and which can be covered during self-reflection in a group with discussion. ▶ Use the information for each participant to further refine their focus during coaching, including the behavioral coaching process when appropriate. Goal: Find the one behavior or area that will have maximum impact.
After or Even During Assessment Phase – Sessions 3+	<ul style="list-style-type: none"> ▶ Coaching begins. Meet monthly with the group and meet with each participant every month or two. Emphasis is on: <ul style="list-style-type: none"> ▶ Creating new behavior/behavioral coaching (notes/feedback process); ▶ Current issues related to overall engagement and client’s goals (specific people and situations); and ▶ Occasional review and update of leader’s dashboard/development plan. ▶ Where behavioral coaching is being used: At end of every month, client receives feedback/data about behavior change and discusses with coach.
Approximately every 3 months (as appropriate)	<ul style="list-style-type: none"> ▶ Conduct review of coaching with client and any sponsor.
Approximately every 6 months (as appropriate)	<ul style="list-style-type: none"> ▶ Conduct second online 360 to confirm results, and/or 360 verbal to confirm results and identify new opportunities for coaching.

Optional: As time permits, for groups that might not have had formal leadership training, include a curriculum based on desired toolkit or other topics.