

Qualification: CIPD Diploma in Applied Human Resources

Module Name: **Contributing to Coaching and Mentoring in the Workplace**

Produce a portfolio of approximately 3000 words

LO1 Be able to assess the impact of coaching and mentoring activity within an organisation and make recommendations for further development

LO2 Be able to support the implementation of coaching and/or mentoring programmes within an organisation

Word Count: 2707

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Student Number: 1806991

CIPD Membership Number: 52080882

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: Jane Sadler

Date: 4 April 2020

Contents Page

	Page
Evidence Matrix	3
LO1 Be able to assess the impact of coaching and mentoring activity within an organisation and make recommendations for further development	8
LO2 Be able to support the implementation of coaching and/or mentoring programmes within an organisation	11
Bibliography	14
Collection of evidence	17

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Qualification title: CIPD L5 Diploma in Applied Human Resources				Unique Learner No. (ULN): 1806991		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.1	Excerpt from handbook showing reference to training	EV1		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.1	Email relating to training costs in twelve month period showing a breakdown of spend	EV2		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.1	Induction plan showing budding	EV3		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.1	Email identifying informal mentoring taking place alongside formal training	EV4		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.1	Email identifying senior managers undertaking 1:1 mentoring	EV5		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.2	Excerpt from staff survey showing opportunities to learn outcomes	EV6		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Payroll report showing millennials as a percentage of total workforce	EV7		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Payroll report showing millennials as a percentage of leavers over a 6 month period	EV8		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Minutes from a training update meeting identifying that managers did not understand the fundamentals of coaching and mentoring	EV9		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Company Organogram	EV10		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Email from the Training Supervisor indicating the presence of a 'command and control' culture	EV11		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Training session brief for managers showing the inclusion of communication tools and active listening	EV12		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Excerpt from staff survey indicating a lack of formal appraisals taking place	EV13		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Excerpt from staff survey indicating a lack of trust and two-way communication	EV14		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Excerpt from staff survey indicating a lack of employee voice	EV15		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.3	Excerpt from staff survey indicating a lack of feedback	EV16		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	1.4	Email from senior manager outlining the recommendations suggested where well structured and would be of benefit to the organisation	EV17		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.1,2.3	Coaching presentation for Managers	EV18		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.1	Email to trainer asking if coaching could be included in the next training session	EV19		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.1,2.3	Email to managers promoting the benefits of coaching and identifying Landburg Instant pay-off coaching	EV20		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.1	Email from employee advising that my coaching approach had helped her in her development	EV21		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Screen shot of existing L&D policies and best practise that I read in order to start to develop one for Puffin	EV22		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Email to external consultant regarding document review	EV23		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Draft structure for new performance review taking onboard a coaching approach	EV24		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Existing Performance review form	EV25		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Draft Return to work form implementing a more coaching approach	EV26		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.2	Email to managers which included a link to a video showing how to conduct a return to work session using more open questioning	EV27		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Training brief showing inclusion of speed coaching sessions throughout the day	EV28		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Email confirming booking of the Finance for non-finance managers course	EV29		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Email from a Line Manager showing that the presentation that I had given had been useful to widen their understanding of coaching	EV30		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Minutes for a meeting with non-managerial staff from various departments to discuss how coaching could be implemented within the organisation	EV31		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Action Plan showing how to further implement and maintain coaching and mentoring within Puffin	EV32		
5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Email from Head of Operations outlining agreement to the action plan and identifying that my contribution had been effective and supportive	EV33		

5ADCM	Contributing to Coaching and Mentoring in the Workplace	2.3	Email from a Line Manager informing of some positive behaviour change as a result of a coaching approach.	EV34		
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Candidate declaration:

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

Signature:

Jane Sadler 4 April 2020

LO1 Be able to assess the impact of coaching and mentoring activity within an organisation and make recommendations for further development.

1.1 Within Puffin Produce Ltd there is no formalised approach to either coaching or mentoring which is reflected in the lack of formal policies, procedures and documentation surrounding these areas such as an L&D policy. The Company Handbook only refers to training (EV1) which is reflected with the company spending in excess of £28K on external training in the last 12 months. (EV2) Our induction programme has elements of mentoring whereby new starters are assigned a buddy who works with them to enabling them to become competent team members, (CIPD, 2019a) (EV3) however the process focuses heavily on teaching skills so is more aligned with training. (CIPD, 2019b) Due to our requirement for strict adherence to rules and standardisation of processes often this training approach is more prevalent/appropriate for certain roles within the organisation. (Downey, 2003)

There is an element of mentoring within the management and administration teams particularly when people are new to the role, although this is very much an informal development process. Eg Our Finance Manager is mentoring our Business Analyst alongside his formal ACCA training. (EV4) In addition to this a couple of the senior managers have taken up traditional 1:1 mentoring with an external mentor to assist them in *“significant transitions in knowledge, work or thinking”*. (Clutterbuck & Megginson, 1999 pg3) (EV5) This is not been a formal process and has very much been arranged by the individuals in question seperately from HR. Whilst it could be said that this type of informal mentoring supports individual and team objectives, due to the informal approach there are no evaluation tools in place measuring its success or establishing any return on investment (Whitmore, 2017). Therefore, any beliefs surrounding effectiveness are purely an assumption and not based on either qualitative or quantative evidence. There has been no evidence found of coaching and if it is in existance it is very informal and sporadic, with the predominant development interventions being training and mentoring to a lesser extent.

1.2 With this in mind the effect of coaching and mentoring within the organisation is very limited and with the lack of formal strucutre it is difficult to ascertain the frequency and effectiveness of any intervention. It is therefore difficult to understand how coaching and mentoring support the achievement of individual, team or organisational objectives although due to the lack of these initiatives it would be fair to say that they do not support achievement of objectives on the whole. However, on a positive note survey results showed that 58.18% of respondants said that they had felt that they had had the opportunity to grow and learn within the last year, (EV6) although due to a lack of qualitative data it cannot be determined if these opportunities had been the result of coaching/mentoring or training interventions.

1.3 Evidence suggests that there are many benefits to implementation of coaching/mentoring both to the individuals directly concerned and the organisation. (Downey, 2003) highlights that due to the changing needs of millenials organisations should consider moving away from a control and command culture to a more collaborative culture. Within Puffin Produce 59% of our workforce would be classed as millenials (EV7) who would typically require a more meaningful work, advancement and development (Bravery et al., 2019) which could in part be delivered through a stronger coaching and mentoring culture. Viewed in line with the statistic of 65% of our leavers within a 6 month period had been millenials (EV8) it could be argued that the lack of coaching/mentoring is attributing to the

turnover of staff. Our Line Managers do not understand the fundamentals of either coaching and mentoring (EV9) and as a result are not confident and do not appreciate the benefits ie increased engagement, job satisfaction and retention.

Managers still tend to operate very much a 'command and control' style due in part to the relatively hierarchial structure within the Company (EV10) and the need to work to unflexible time pressures and adhere to strict internal and externally imposed processes. Our very task based and output driven culture causes managers to resist a coaching/mentoring approach as in the short term 'command and control' rewards an immediate outcome as opposed to a mentoring/coaching approach which is a longer process even though it will release more management time in the longer run and create a better team. (Downey, 2003) (EV11) Michelin reported a similar hierarchial structure within their French division and during their transition to collaborative working managers reported that initially this lack of giving instruction felt like losing power but added with the new approach they got **"10 times more back from the teams"**. (Hill, 2017) On this basis it is possible that our managers may also be fearing that by working collaboratively they would be losing their power.

Until recently none of our managers had been trained in the skills that are required for successful coaching and mentoring such as active listening, however in a recent training course this was included although the link to coaching/mentoring was not enforced. (EV12) It is possible that due to inexperience there are few managers or peers that would be able to undertake the role of coach or mentor effectively at present.

The organisation currently adopts a traditional annual style appraisal although 72% of respondents in a recent survey identified that they had not received an appraisal each year. (EV13) As successful performance reviews should adopt a more future focused and coaching approach (CIPD, 2019c) it is clear from our survey results that some of the key factors in coaching ie trust and two way communication are not normally present with 51.42% stating that either one of both of these was not present. (EV14) This statistic perhaps strenghts the fact that line managers are not confident in coaching in addition to questioning if the traditional approach is fit for purpose, supporting a coaching/mentoring culture. Survey results revealed that 21.82% of repondants felt that their opinions counted which indicates a lack of true employee voice and collaboration and a more command and control culture (EV15), in addition only 22.22% of respondants received regular fedback (EV16). As Line Managers are key to developing employees (Capelli & Tavis, 2016) it is important for the organisation to equip our managers with the knowledge and skills required to coach and mentor our staff.

1.4 Research suggests that coaching and mentoring have a positive effect on individuals, teams and organisations so it would appear important that we adopt this approach. Considering that neither coaching or mentoring are embedded within the organisation and the task/skill nature of the business the initial focus should be to adopt a coaching culture. For this reason my recommendations are limited to developing coaching.

Recommendations

- Establish a clear, inspiring vision for coaching within the organisation that is linked to the achievement of organisational goals. (Parsloe & Leedham, 2016)
- Educate Senior managers and key influencers about the benefits of adopting a coaching culture to ensure 'buy-in' in order to support the move from a 'command and control' culture to one that is more collaborative in approach. (Forbes, 2016) They should also understand the importance

of being a 'social enterprise' within a changing world of work and how coaching can positively affect this. (Deloitte, 2019)

- Formulate a Company Learning and Development policy which provides a structured approach to development, methods of evaluation and quality standards. (CIPD, 2013)
- Effective Line Managers are often best placed to provide coaching to develop their team.(CIPD, 2013) This is supported by Google who reported a 13% improvement in coaching scores when delivered by a Line Manager. (Bock, 2016) It is recommended that the company invest in external training/coaching to equip our line managers with coaching skills and also to educate them in the benefits for themselves and their team. (Parsloe & Leedham, 2016)
- Highlight the need for change to all levels (CIPD, 2013) educating the wider organisation as to what coaching is and how it can benefit them and the organisation. (Forbes, 2016)
- Netflix are known for their high levels of employee engagement and have adopted a culture of continuous feedback and recognition thus shifting away from annual appraisals in favour of a more agile and organic approach which encourages positive working relationships. (McCord, 2014) In line with the Netflix approach we should review the current performance review system to reflect a more collaborative, agile approach ensuring that any future system incorporates frequent coaching feedback and is both user friendly, reducing the need for excessive form filling, and effective. (CIPD, 2013) Investigate the feasibility of an online performance management tool which would enable greater agility, easier two way communication and goal setting. (Walter, 2018)

These recommendations were discussed with a senior manager who felt that this was a structured approach and implementation would be beneficial to the organisation. (EV17)

Effective implementation of the recommendations will assist in developing a culture that is more 'person' and 'task' focused and will support a shift away from the more 'power' and 'role' culture that is currently in place. (Huczynski & Buchanan, 2016) I would hope that there would also be an increase in trust and development of stronger relationships paving the way for future mentoring programmes.

LO2 Be able to support the implementation of coaching and/or mentoring programmes within an organisation.

2.1 As the current culture within the organisation doesn't lend itself to a coaching and collaborative approach initially I needed to promote the benefits of coaching and the importance that it plays in performance from an organisational and human perspective. In a Deloitte survey 82% of respondents, comprising of high level managers and HR professionals, stated that culture was a potential competitive advantage (Deloitte, 2016), which I feel is a key 'buy-in' point for our senior managers. As an initial step I produced a presentation for the senior management team. (EV18)

As part of an ongoing training programme for our Line Managers I spoke with the trainer to introduce an element of coaching in the next session. (EV19) To support this I sent the course attendees some information to further promote and embed the wider benefits of coaching eg increased performance/efficiency and improved relationships. As time is a barrier, I ensured that the information was easy and quick to digest as it was unlikely that they would read lengthy documents. (EV20)

On a personal level I have tried to promote the benefits by positive role modelling eg I coached an inexperienced employee after she experienced a difficult conversation based around a payroll query/complaint. Although my natural approach is to 'fix the problem' I consciously tried to 'coach the person' (Inam, 2018) by focusing on open questions and listening, ultimately enabling her to arrive at her own solution as to how to handle similar situations in the future. The employee said that this approach had helped to build her confidence and she would feel happier dealing with similar situations in the future, highlighting that she would also consider self-coaching as a means of self-development. (EV21)

2.2 As we do not have a strong coaching culture in place and effective implementation of policies, procedures and subsequent culture change will take time, agreement and buy in from senior managers I researched other organisations learning and development policies with a view to implementing our own. (EV22) Research supports the fact that any L&D policy should align with organisational goals in order to be fully integrated and successful (CIPD, 2020), which highlighted that as an organisation we do not have a clear set of goals or objectives with which to align. As a result the creation of a policy would rely first on establishing our overarching goals.

In the interim I took some steps to introduce coaching behaviours. I undertook a review of our company handbook and associated paperwork with a consultant to understand where we could improve our policies and practise from both an employment law perspective and to display more of a coaching, holistic approach. (EV23) As a result of this I created a draft performance review form (EV24) which had more of a coaching focus than our existing document (EV25), encouraging a more continuous coaching culture. (CIPD, 2017) I also reviewed our return to work form implementing a coaching approach with open questions and opportunities for active listening (EV26) in the hope that this may help improve attendance. To support managers I sent them a video link which showed how they could conduct an effective return to work interview using more open questions. (EV27)

As evidence suggests that purely classroom based learning does not encourage behaviour change as it is not frequent enough, (Webber, 23) I suggested to our training supervisor that he introduce regular

coaching activities in his schedule training days and to encourage coaching conversations between people within the operation at every opportunity.

2.3 As mentioned I requested that our most recent management training include some practical emphasis on coaching (EV19) so that our managers could gain practical experience. The programme included a series of speed coaching sessions using the GROW model (EV28) to enlighten people to the fact that coaching does not need to take up excessive amounts of time.

The training gave practical tips on developing time management and organisational skills (EV28) as these are also required qualities of a coach. The managers were introduced to tools such as Eisenhower's Matrix (Mindtools, na). As Landsburg (2015) identified some of the best coaching happens in small doses and suggests that even ten minutes of coaching can save an hour. The focus of the sessions was coaching for delegation enabling managers to coach employees thus freeing up more of their time. To assist them in practical application of this I emailed a copy of the Landsburg Instant Payoff coaching model to provide them with a tangible format to work with. (EV20)

I had also organised earlier management training courses that introduced our managers to the Personal Iceberg, Conscious Competence Model and Transactional Analysis all of which improve communication skills that are vital in coaching. (UK Coaching Organisation, na)

Business acumen plays a direct role in L&D as managers are more equipped with the skills necessary to help find solutions that support organisational outcomes, with 90% of L&D professionals citing this as a priority. (Blackwell, Daly, & Lancaster, 2019) Whilst business acumen is gained in a number of ways I set up a Finance for non-Finance managers course to help our managers identify some of the financial tools/indicators used in the organisation and increase their understanding of financial reporting as a whole. (EV29)

To reinforce the benefits of coaching and encourage line managers to adopt a coaching approach I presented the Senior Manager Coaching powerpoint (EV18) to them. This did not build on their skills but increased their broader knowledge of coaching to support the behaviour change. (EV30)

2.4 As we have not completed the full process of developing a coaching programme I did not feel that it would be beneficial to launch a full presentation to staff as I needed to ensure that the senior managers were fully behind implementation of a coaching culture and had agreed an overarching objective in which to align an L&D strategy.

However I met with some key departmental staff to discuss their opinions on coaching and introduced them to new approaches that the managers may take having been on the training. It was evident from the meeting that staff did not really understand what coaching was and how it could benefit them, although by the end of the meeting they had more of an understanding of coaching and the model introduced to the managers, and felt that a coaching culture would be beneficial. They stated that they felt a coaching approach would build relationships between them and their managers and would also help them develop. (EV31)

2.5 In order to support the ongoing evaluation and continuous improvement of coaching and mentoring within the organisation I developed an action plan (EV32) which was discussed with a senior manager initially. He confirmed that the steps that I had taken to date to introduce coaching

were both practical and supportive particularly for the Line Managers and that the action plan would support future development which he felt would be beneficial to all stakeholders. (EV33)

Whilst full implementation and a culture change will take time, one of our line managers has already reported some benefits of taking a more coaching approach to situations such as an increase in positive behaviour and discretionary effort (Gallup, 2017) (EV34) This is a positive step forward for me and I am hopeful with continued effort more benefits will be seen.

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EV1

Excerpt from Company Handbook showing reference to training

Training and Development

Puffin Produce Ltd believes that its most valuable resource is its employees. The continued success of the organisation depends upon having highly motivated people with proper skills in the right job at the right time. We recognise the need to offer all employees a clear path of progression within the business. Therefore, job descriptions and personal objectives will be reviewed on a regular basis. The company training policy satisfies legislation.

Induction

Upon joining, each new member of the team receives an induction to the Company, its aims and goals, the individual's department and role, and how they contribute to the activities of our Company. We will also introduce you to your colleagues and try to ensure you settle in quickly. If at any time you have any queries or are unsure about any aspect of your work please ask us.

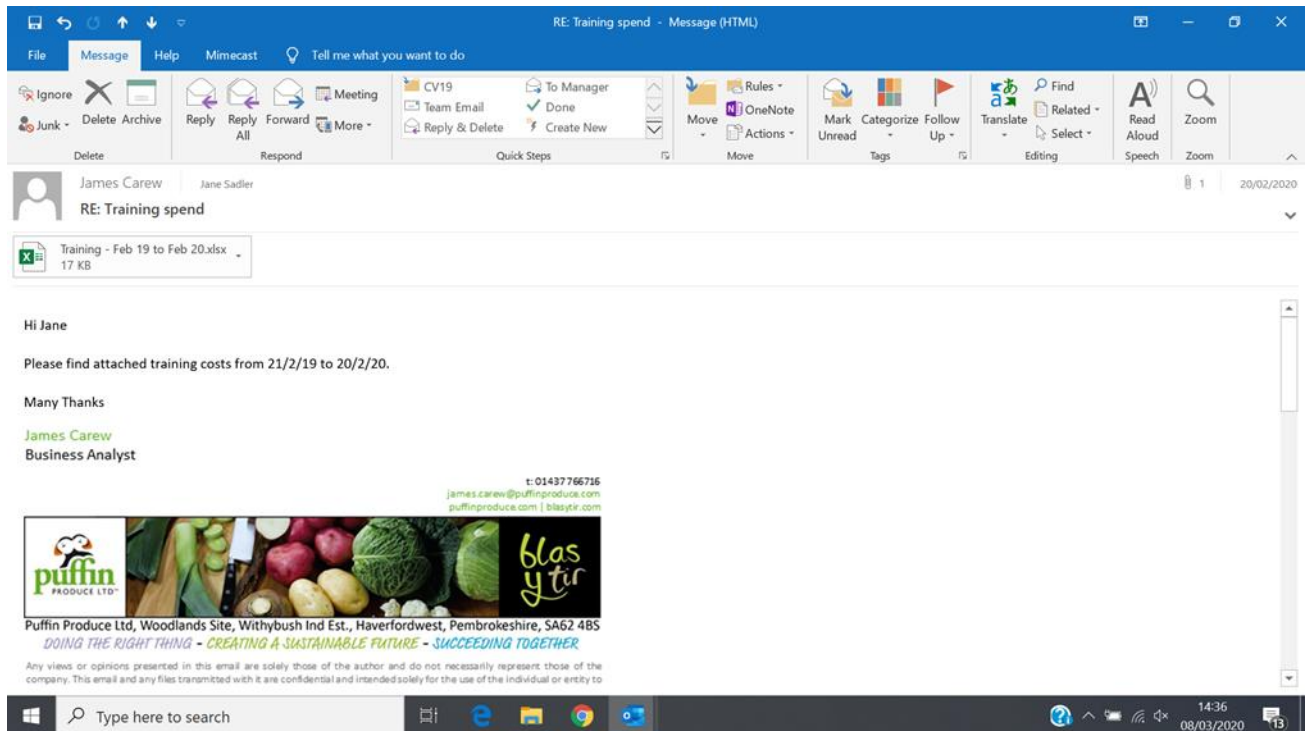
Ongoing Training

Once your induction training has been finished and you have settled in to your new role, you will be given opportunities to learn and develop existing and new skills.

External Training

It is recognised that some training needs cannot be addressed in a timely or effective way through any of the methods detailed above. In these cases training delivered by external providers may be the only choice. Advice on the most suitable training solution to address and identified need and recommended training will be sought by your line manager.

EV 2 Email relating to training costs



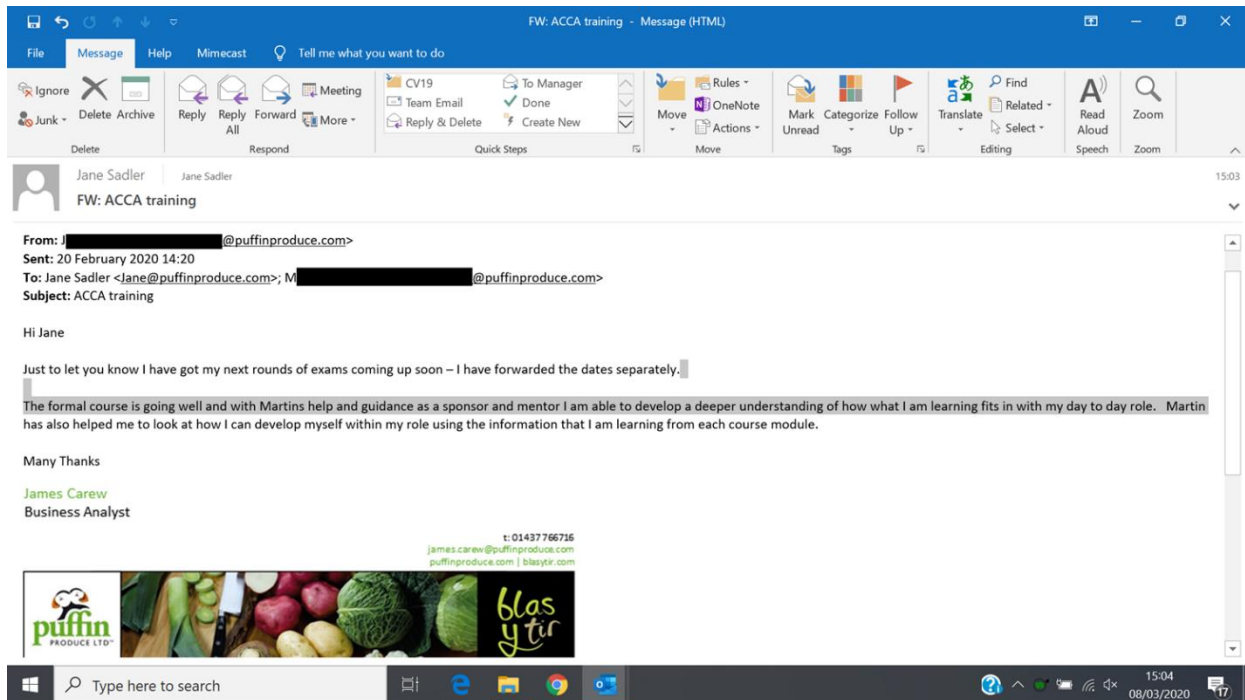
EV2 Breakdown of training costs

Trans. Date	PN	Reference	Debit				
20/03/2019	10	EXP	£216.00				
22/03/2019	10	30320	£125.85				
28/03/2019	11	PP18-027	£1,875.00				
01/04/2019	10	010419	£2,181.33				
11/04/2019	11	7708	£588.00				
11/04/2019	11	51782	£250.00				
18/04/2019	11	24274	£93.75				
18/04/2019	11	123594	£270.00				
30/04/2019	11	N0105120	£30.30				
07/05/2019	13	PO MAY 19	£304.56				
31/05/2019	12	N0106442	£70.70				
07/06/2019	13	EXP	£70.23				
10/06/2019	13	INV-0035	£873.20				
15/07/2019	1	190800	£450.00				
19/08/2019	3	SINV19_076583	£2,006.66				
11/09/2019	3	1064014	£2,525.00				
16/09/2019	3	EXP	£240.00				
14/10/2019	4	201047608	£178.50				
16/10/2019	4	S0111857	£12.00				
31/10/2019	5	A0112090	£190.00				
05/11/2019	5	MTBB7AADC	£355.00				
27/11/2019	6	MTBB7AAE9	£335.00				
08/12/2019	8	NW DEC 19	£15.00				
10/12/2019	6		£76.89				
10/12/2019	6		£116.10				
16/12/2019	7	10704	£400.00				
19/12/2019	7	EXPENSES	£112.00				
23/12/2019	7	1065300	£5,050.00				
07/01/2020	8	PP19-016	£2,250.00				
07/01/2020	8	PO JAN 20	£20.00				
08/01/2020	9	LP619376	£2,395.00				
17/01/2020	8	A0114043	£865.00				
20/01/2020	8	MTBBE6146	£375.00				
27/01/2020	8	MTBBE6153	£365.00				
10/02/2020	9	SINV20_018589	£1,155.00				
14/02/2020	9	EXP	£78.00				
Management training			£26,514.07				
07/03/2019	10	2012-1460	£180.00				
11/09/2019	3	12958	£360.00				
11/09/2019	3	12953	£360.00				
26/09/2019	4	S162198	£300.00				
02/10/2019	4	S162277	£300.00				
30/10/2019	5	13098	£240.00				
Direct labour training			£1,740.00		Total Spend	£28,254.07	

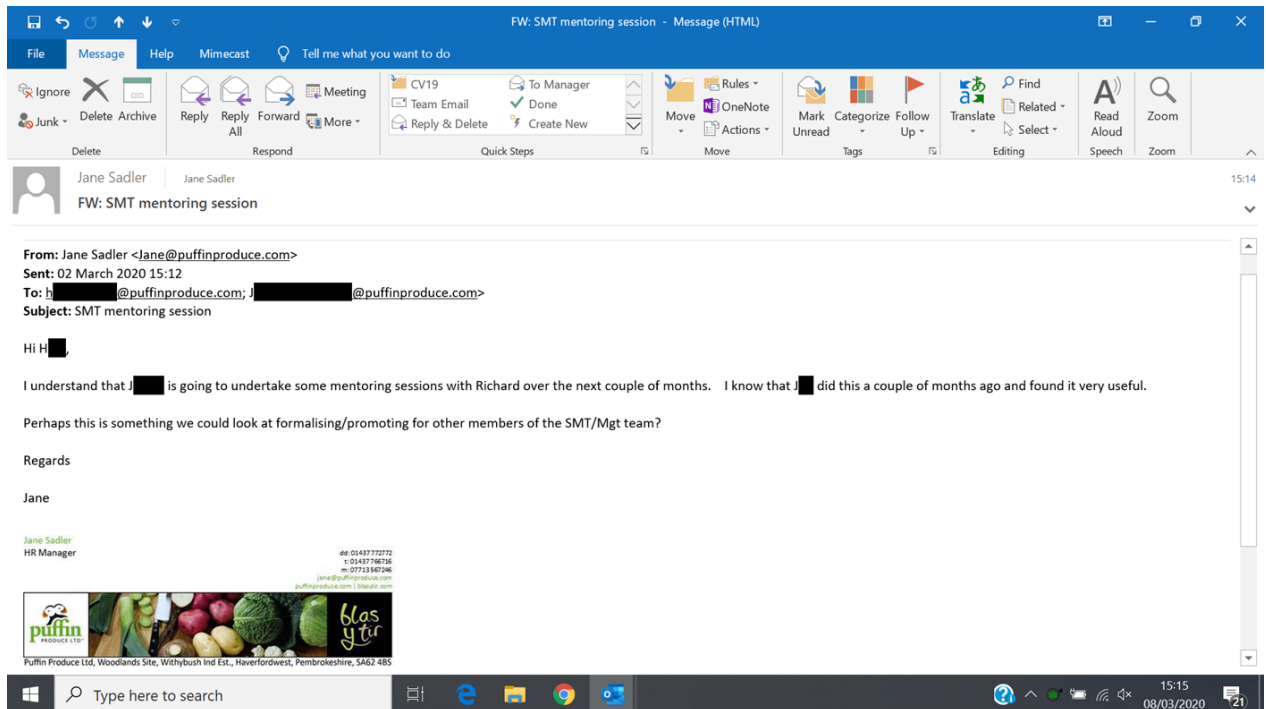
EV 3 Induction plan showing buddying

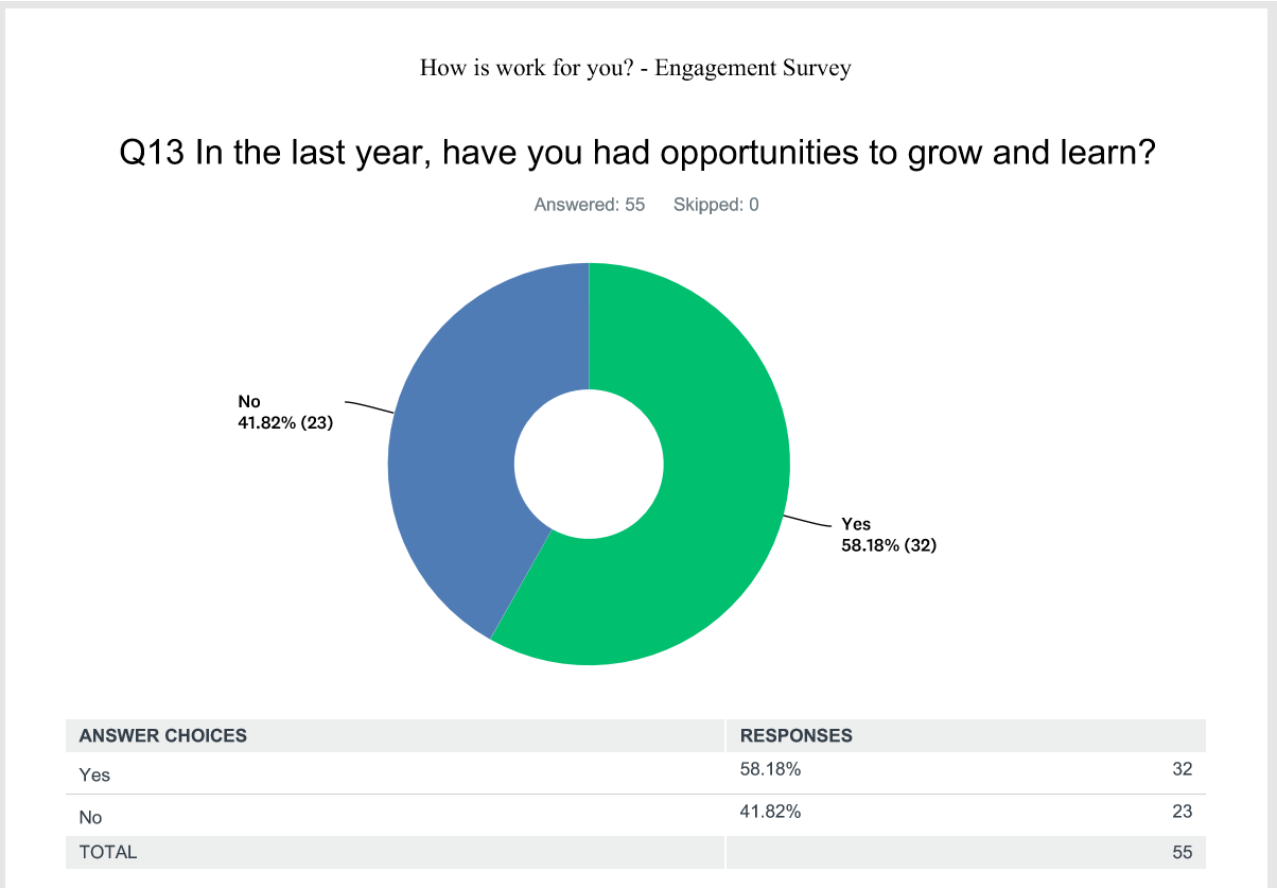
	Induction Programme (prod)									
Day 1	0800 - 0830	0830 - 0915	0915 - 1000	BREAK	1020 - 1040	1040 - 1230	LUNCH	1300 - 1400	1400 - 1500	1500 - 1600
	Welcome and Introduction	Site Tour	Technical Training P1		Technical Training P2	Technical Training P3		HR Training P1	HR Training P2	HR Admistration and Documentation if overrun
	JS	GR	MN/MJ/DI		JS	JS		JS	JS	JS
Day 2	0800 - 0830	0830 - 0915	0915 - 1000	BREAK	1020 - 1200	1200 - 1230	LUNCH	1300 - 1400	1400 - 1500	1500 - 1600
	Production Rota and Shift patterns and structure	Introduction to Vs and Bs	Introduction to Health and Safety		Manual Handling Pallet truck practical	Factory Tour P1 MEET BUDDIES		Factory Tour P2	Factory Practical P1 Work with buddies	Factory Practical P2 Work with buddies
	?	GR	GR		GR					
	Technical P1: Defect Training QC Lab	Technical P2: Hygiene policy Protective clothing policy Staff health questionnaire (complete on arrival) Allergen and Nut Policy Pen policy Intro to HACCP Staff induction Procedure	Technical P3: Alcohol breath test procedure Glass breakage procedure Transit packaging procedure Plaster procedure		HR Training P1: Absence and lateness policy Equal Opportunities Intro to Vs & Bs Modern slavery GDPR	HR Training P2: Conformations Food hygiene booklet Issue of clothing		Factory Tour P1: Tour the factory and facial scanner Factory Tour P2: Lines 1,2 and 3, trans pack, potato ID, PTC Location of E stops and fire exits	Factory Practical P1: working on the lines/ run through some of the PTCS Factory Practical P1: As above	Misc

EV4 – Email identifying successful informal mentoring



EV5 – Identification of Senior managers undertaking 1:1 mentoring





EV 7 Payroll printout showing number of millennials within the workforce

First Name	Surname	Date of Birth						
		06/06/1957			20/09/1983		05/07/1992	
		25/09/1958			21/12/1983			
		01/07/1959			26/12/1983			
		30/04/1960			29/12/1983		Total staff 154	
		28/01/1961			17/03/1984			
		13/02/1961			25/04/1984		Millenials 91	
		04/06/1961			27/07/1984			
		24/10/1961			17/10/1984		59%	
		28/08/1962			13/12/1984			
		09/05/1963			23/01/1985			
		25/05/1963			25/02/1985			
		31/05/1965			16/03/1985			
		04/05/1966			26/03/1985			
		18/07/1966			06/01/1986			
		03/09/1966			27/02/1986			
		12/04/1967			01/03/1986			
		11/02/1969			20/03/1986			
		02/08/1969			01/05/1986			
		06/10/1969			30/10/1986			
		18/10/1969			05/02/1987			
		16/03/1970			01/04/1987			
		29/09/1970			27/04/1987			
		06/12/1970			15/05/1987			
		19/12/1970			18/05/1987			
		03/04/1971			14/06/1987			
		04/04/1971			15/08/1987			
		21/03/1972			17/08/1987			
		13/10/1972			25/08/1987			
		10/03/1973			06/01/1988			
		18/06/1973			26/05/1988			
		17/10/1973			15/07/1988			
		07/06/1974			17/12/1988			
		20/07/1975			18/01/1989			
		09/02/1976			11/02/1989			
		25/05/1976			11/04/1989			
		04/06/1977			03/07/1989			
		05/12/1977			30/07/1989			
		17/04/1978			03/08/1989			
		02/05/1978			19/09/1989			
		28/05/1978			11/03/1990			
		10/06/1979			29/03/1990			
		23/07/1979			19/04/1990			
		31/08/1979			05/05/1990			
		02/11/1979			25/05/1990			
		08/12/1979			27/05/1990			
		02/01/1980			11/08/1990			
		19/01/1980			09/11/1990			
		13/04/1980			11/12/1990			
		20/11/1980			15/01/1991			
		15/03/1981			11/03/1991			
		02/04/1981			03/06/1991			
		17/09/1981			09/08/1991			
		12/05/1982			21/08/1991			
		26/09/1982			21/08/1991			
		18/10/1982			21/09/1991			
		14/04/1983			10/12/1991			
		29/06/1983			26/04/1992			

EV8 Payroll report showing millennials as a % of leavers

Leavers Report - 01 Aug 19 - 31							
Ref	Surname	Forename	Length of Service (Years)				
569			0.08		Total leavers 46		
561			0.17		Millenial leavers 30		
242			2.94				
469			0.97		Millenials as % of leavers		
450			1.14		65%		
545			0.41				
522			0.58				
572			0.14				
547			0.44				
508			0.64				
577			0.13				
574			0.13				
573			0.13				
563			0.24				
562			0.28				
557			0.34				
555			0.38				
560			0.31				
579			0.18				
578			0.20				
571			0.28				
570			0.28				
564			0.33				
558			0.43				
618			0.03				
479			1.19				
624			0.02				
612			0.04				
428			1.56				
619			0.05				
616			0.06				
585			0.34				
525			0.85				
607			0.07				
567			0.49				
592			0.32				
613			0.10				
610			0.10				
604			0.13				
606			0.10				
512			0.96				
559			0.65				
609			0.15				
605			0.15				
449			1.57				
417			1.71				

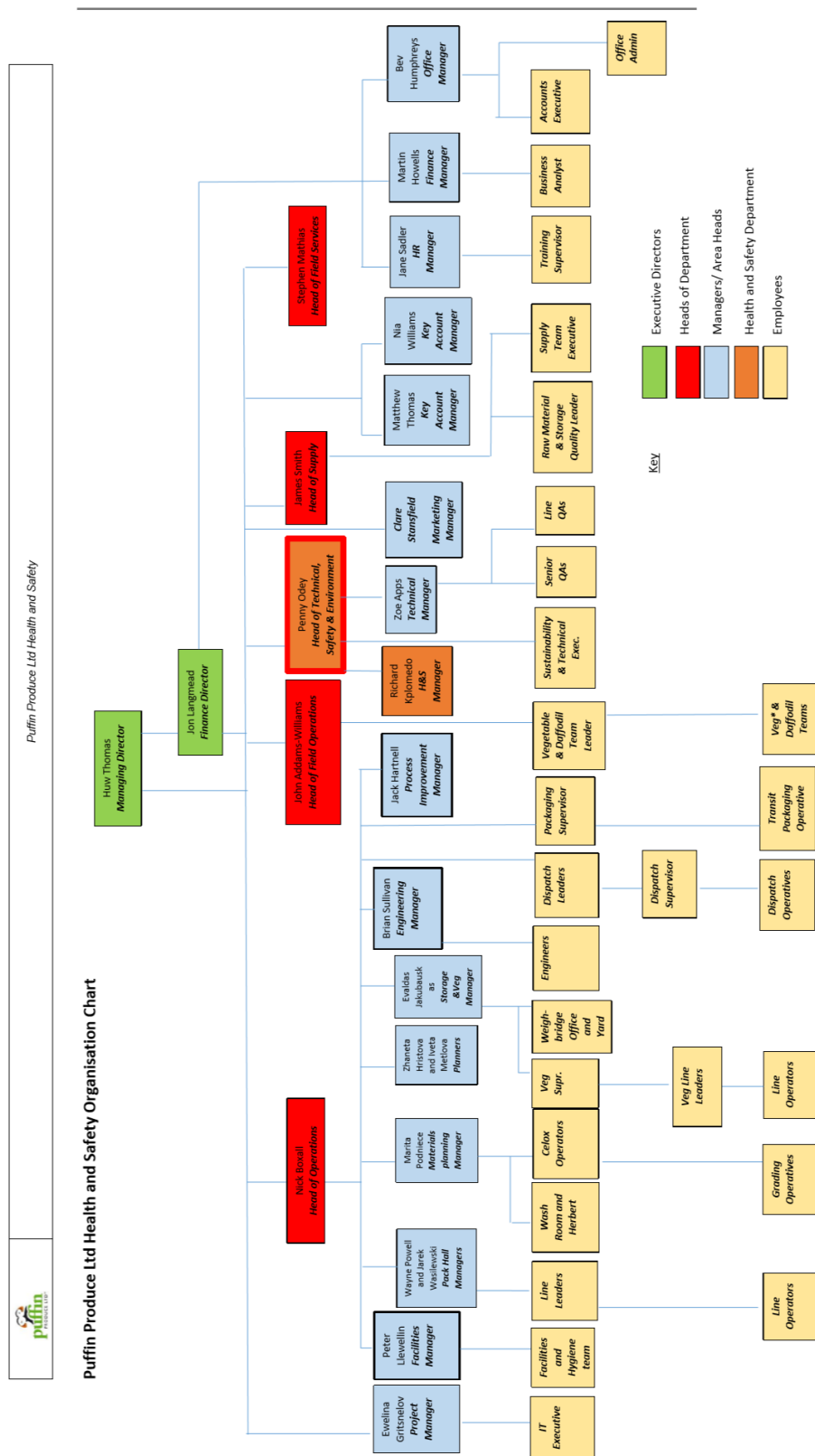
Training Update meeting

6 February 2020

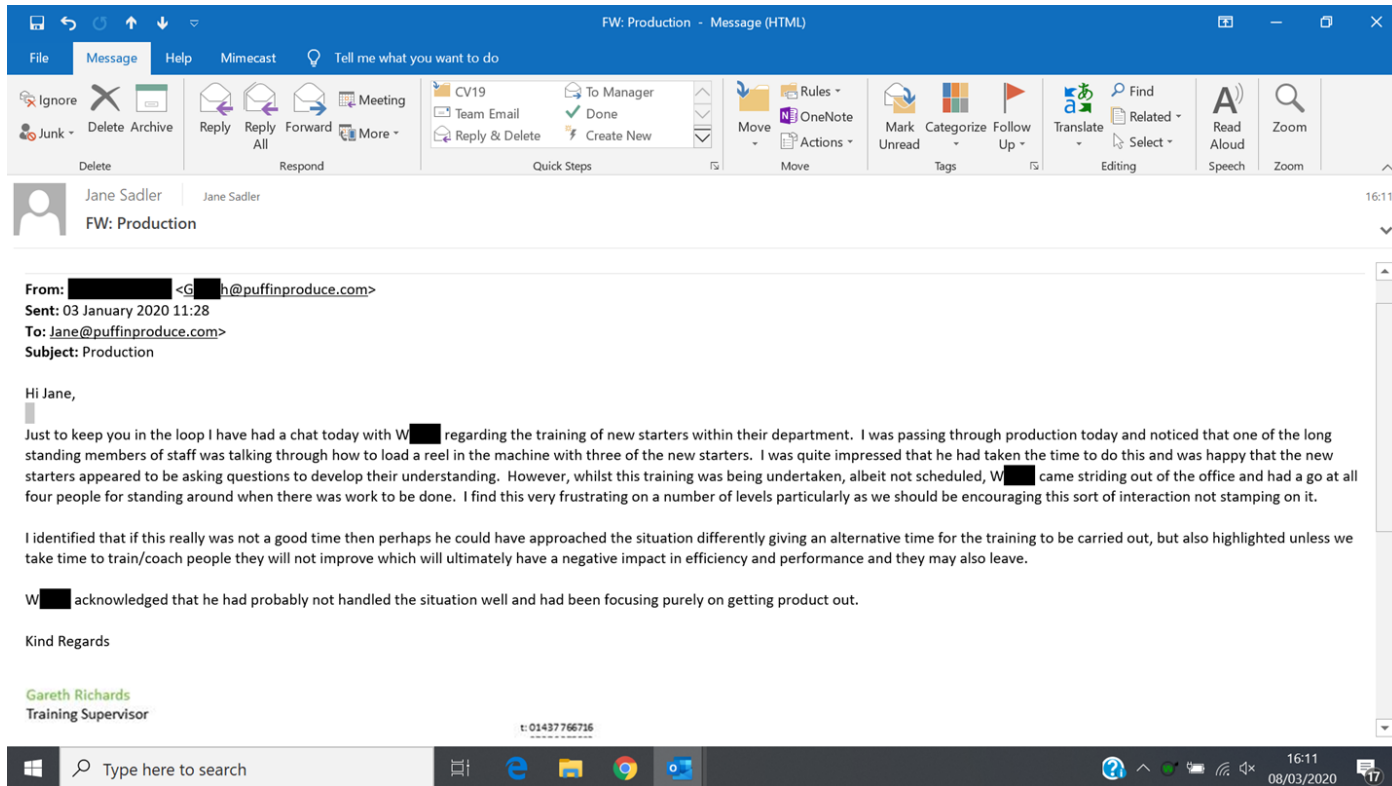
Present : Jane Sadler, G [REDACTED]

1. Discussed current statutory training – RTITB and ROPT training next week and the week after
2. Inductions – Returning staff so will review leaving dates to determine extent of induction required on 24/2.
3. GR working with area leads to produce training cards for departmental tasks – has completed Production, Dispatch and Yard.
4. Following recent conversation GR said that he had spoken with a large number of the managers and supervisors within the Company and that they didn't understand coaching and mentoring in a business context and would not feel confident if they were asked to carry out either.
5. Discussed providing some form of training on the principles and benefits of coaching possibly integrate into the current management sessions.
6. JS will collate evidence to support funding claim for all relevant training to date

EV10 – Company Organogram



EV11 Email indicating a command and control culture



Session 2: Communications

Time	Content	Details
9:00	Welcome	Welcome back from RS Outline of the day & outcomes
9:15	PLS Discussion	Small group discussion on what they took from S1, application at work and questions
9:45	MBTI / EQ Debrief	Group conversation reflecting on Session 1 and PLS conversation
10:15	SDI Strengths	Advanced EQ looking at the SDI diamond & overdone strengths.
10:45	Team and personal application	How does this model apply to you? ...to your team? Revisit Johari
11:00	<i>break</i>	
11:15	Communication tools	Communication Iceberg Rapport triangle + exercise
11:30	Team Analysis	What happens in your team? Communications at your level, where you could improve.
12:00	Deeper listening	Listening skills, listening levels. > Vs&Bs on 'value all ideas', on 'ask and offer help' and on 'take time to support and listen'
12:15	Listening Game	Farmers Game
12:45	Game debrief	Facilitation rainbow, how you communicated in this game and your communication style at work.
12:45	<i>lunch</i>	
1:30	Listening exercises	Walk and talk to see skills in action
2:00	Application	How does listening help Build Effective Relationships? Where is there room for it at work?
2:30	<i>break</i>	
2:45	Game 2 (Welsh Holiday)	Short competitive team games to bring communication habits and techniques to the fore.
3:30	Team Game Debrief	Debriefing the team game using the tools covered in today's session.
4:00	Feedback	Feedback rules & Feedback framework.
4:30	PLS Conversations	PLS conversation about where this is applicable in the next month. Development of an individual improvement goal (2 changes)

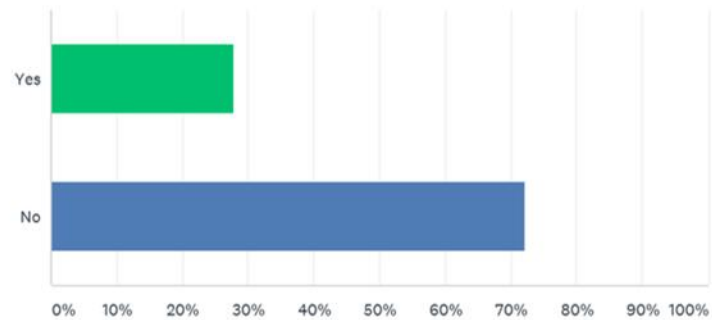
EV13 Excerpt from staff survey showing lack of formal appraisals

•

•

Have you had a formal appraisal with your manager each year you have been employed?

Answered: 36 Skipped: 0

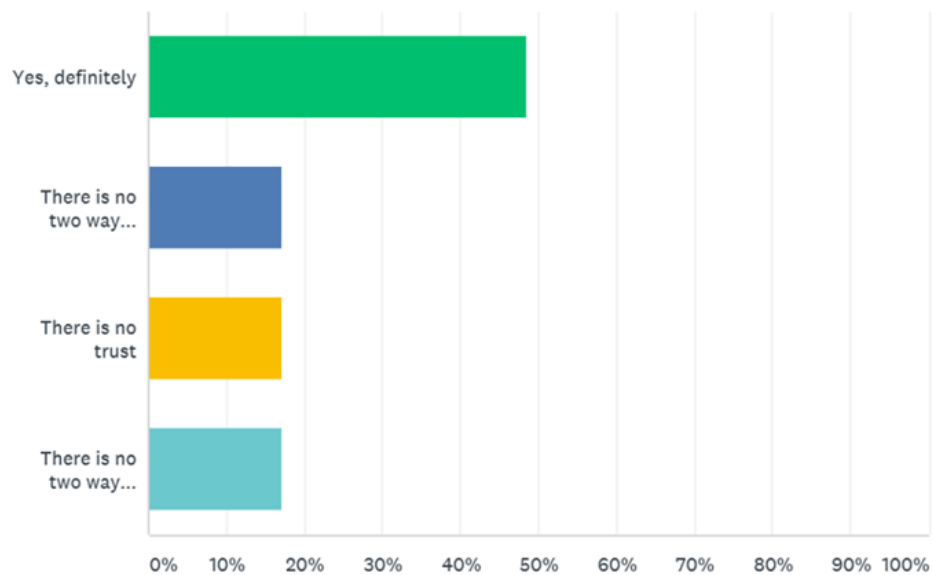


ANSWER CHOICES	RESPONSES	
Yes	27.78%	10
No	72.22%	26
TOTAL		36

EV14 Excerpt from staff survey indicating lack of trust and two-way communication

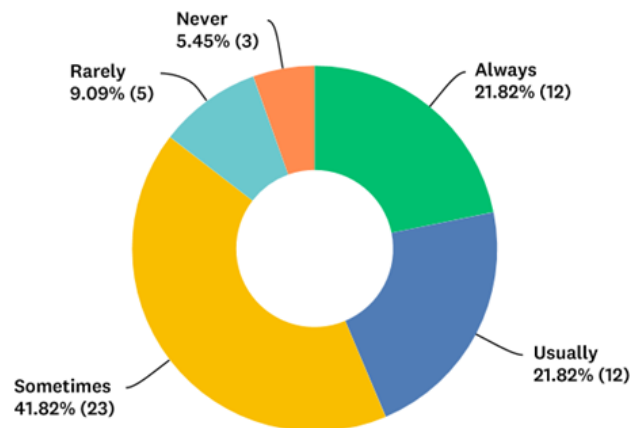
Do you feel there is open two way communication and trust between you and your manager when discussing your performance and development?

Answered: 35 Skipped: 1



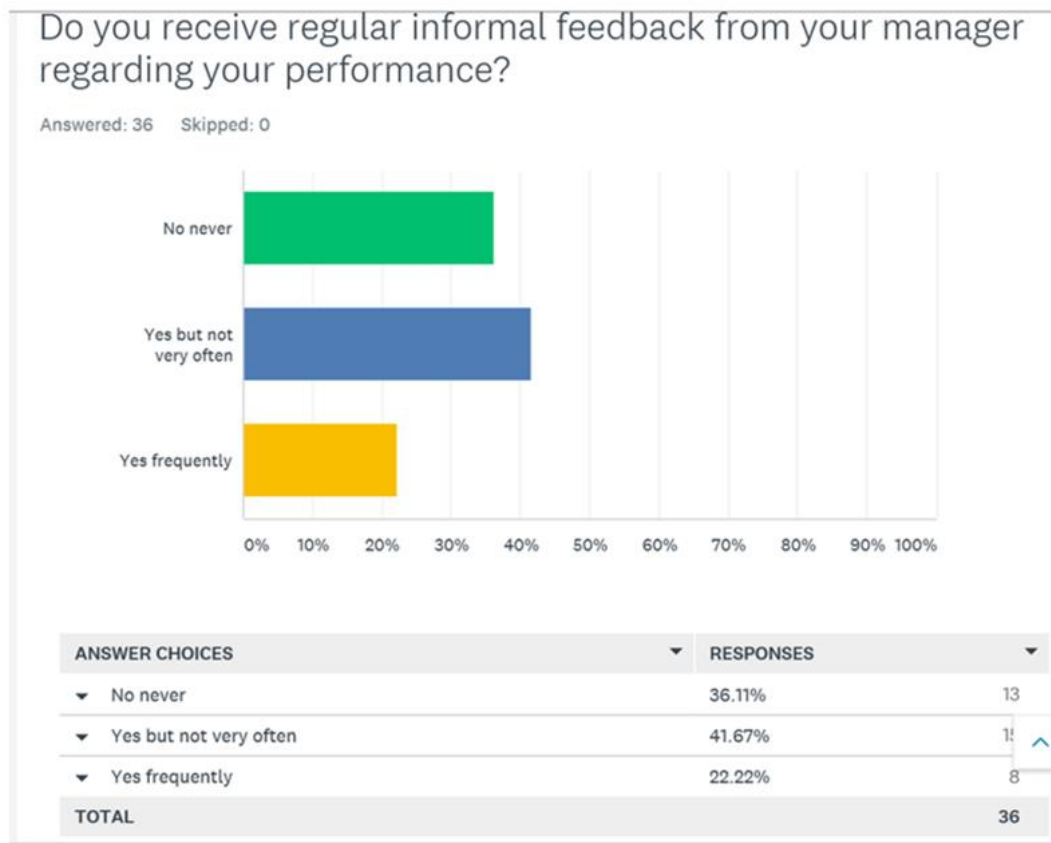
Q7 At work, do your opinions seem to count?

Answered: 55 Skipped: 0



ANSWER CHOICES	RESPONSES	
Always	21.82%	12
Usually	21.82%	12
Sometimes	41.82%	23
Rarely	9.09%	5
Never	5.45%	3
TOTAL		55

EV16 Excerpt from staff survey indicating lack of feedback



EV17 Email identifying that recommendations discussed would be beneficial

From: Nick Boxall <Nick.Boxall@puffinproduce.com>

Sent: 16 February 2020 15:27

To: Jane Sadler <Jane@puffinproduce.com>

Subject: Feedback from Coaching meeting

Hi Jane,

As discussed, in our meeting last week having talked through the recommendations you have put together in order to implement a more coaching style culture for Puffin I feel that the approach you have taken including the recommendations have been structured and would be beneficial to a number of stakeholders.

I understand your concern that while we do not have a set of clear organisational goals it will be difficult for you to align coaching with the achievement of business goals and as discussed I have already mentioned this to the SMT team so I hope that this is something we will be working on in the not too distant future. As you mentioned to maximise business opportunities and success, we all need to be singing off the same hymn sheet!!

I am keen to get behind increasing coaching within the organisation and will be happy to support you to achieve this.

Regards

N [REDACTED]

Head of Operations



Puffin Produce Ltd, Woodlands Site, Withybush Ind Est., Haverfordwest, Pembrokeshire, SA62 4BS
DOING THE RIGHT THING - CREATING A SUSTAINABLE FUTURE - SUCCEEDING TOGETHER

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What is Coaching?

- “Coaching aims to produce optimal performance and improvement at work. It focuses on specific skills and goals, although it may also have an impact on an individual’s personal attributes such as social interaction or confidence”

(CIPD, 2019)

Types of Coaching

- Formal 1-1 coaching
 - Peer Coaching
 - Executive Coaching
 - Corridor Coaching
-
- Coaching can be provided internally or sourced externally

Benefits of Coaching

For the Coachee

- Increased career development. (Conboy & Kelly, 2016)
- Increased learning and skills development that can be implemented both in and out of work. (Passmore & Mortimer)
- Increases levels of intrinsic rewards such as job satisfaction, self-reliance and accountability due to the sense of empowerment created by “engagement-creating coaches” all of which have a positive impact on health and well-being. (CIPD, 2018), (Whitmore, 2017), (Institute of Coaching, [na](#))

Benefits of Coaching

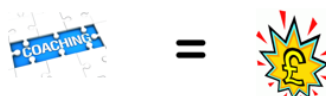
Benefits for the Coach

- More time invested in developing teams will allow more time for coaches to be more strategic. (Whitmore, 2017)
- Adopting a coaching leadership style increases levels of job satisfaction. (Whitmore, 2017)
- Due to the collaborative nature of coaching it expands and accelerate personal growth and development and challenges perceptions which could have a positive impact on both work and personal life. (Mindtool, na b)
- Career advancement is more likely as organisations increase focus on engagement and helping others to grow (Mindtool, na b)
- A benefit to both coach and coachee is when both parties are from within the organisation; they develop a partnership approach to working, which improves working relationships (Whitmore, 2017) and increases insight into other areas of the business.

Benefits of Coaching

Benefits for the organisation

- Increased competitive advantage (Deloitte, 2016)
- Increased discretionary effort from staff as levels of engagement are higher.
- Increased retention thus reducing costs associated with turnover in addition to retaining the talent pool. (Whitmore, 2017)
- Increased buy-in to organisational behaviours and values by the coachee when individual values are matched to that of the organisation, thus having a positive impact on organisational culture. (Downey, 2003)
- Increased productivity, creativity and performance- coaching maximises potential and unlocks latent sources of productivity which in turn has a positive financial impact. (Association of Coaching, na)



Current situation

- No evidence of formal or informal coaching at present
- Managers are not sure what coaching is, the benefits or how to coach
- Coaching is not reflected in our current policies and procedures
- Insights from staff highlights concerns around positive relationships, lack of employee voice and feedback.
 - only 21% of respondents felt their opinion counted
 - only 22% of respondents received regular feedback
 - 51% of respondents felt that there was either lack of trust and two way communication or both

TO GET THIS.....



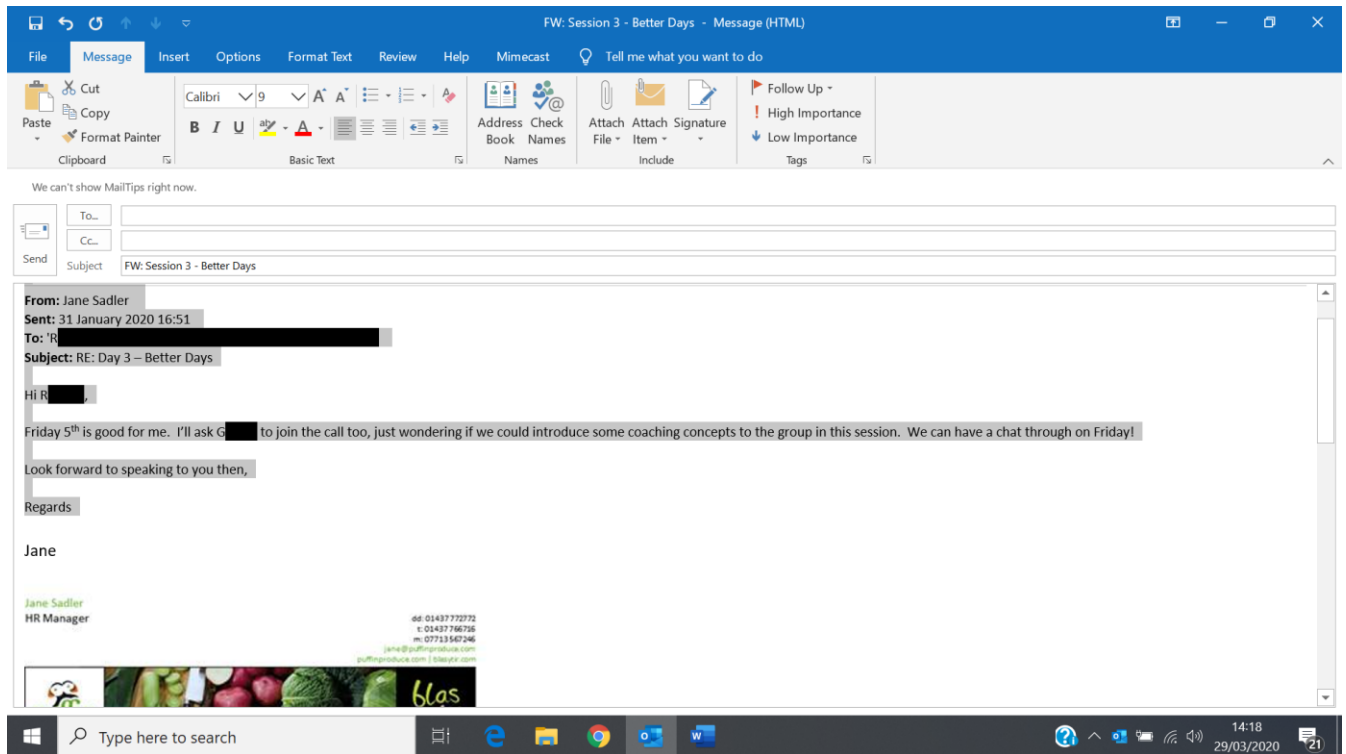
WE NEED TO CREATE A COACHING CULTURE.....

.....and it needs to be led and
supported by you.

Thank you for your time



EV19 Email to trainer to ask if coaching could be included in next training session



EV20 Email to managers promoting benefits of coaching

Coaching Information - Message (HTML)

File Message Help Mimecast Tell me what you want to do

Ignore Delete Archive Junk Reply Forward All Reply Respond Delete

Mon 09/03/2020 16:28
Jane Sadler

Coaching Information

To Wayne Powell; Clare Stansfield; Jack Hartnell; Chris Davies; Daina Peterson; Malgorzata Niemiec; Chris Beff; Angharad Mansell James; Penny Odey; Peter Llewelling; Iveta Metlova; Svilen Ivanov; Beau Cox; Marc Shepherd; Diana Ivanova; Linas Trimaliovas; Gabor Hanzik

Hello all,

I hope that you enjoyed the last session with Richard and that some of the areas that he spoke to you about will help you get 'Better Days'.

I thought that I would send these two pieces of information to you support the speed coaching sessions that you did on the course, the infographic highlights the benefits of coaching and the second piece of information is from a book called the Tao of Coaching by Max Landburg. You focused on the GROW model during the session and this outlines another tool that you can use for quick coaching sessions.

I hope that these will be of interest to you and will help you to develop your coaching style

Regards
Jane

Instant payoff coaching

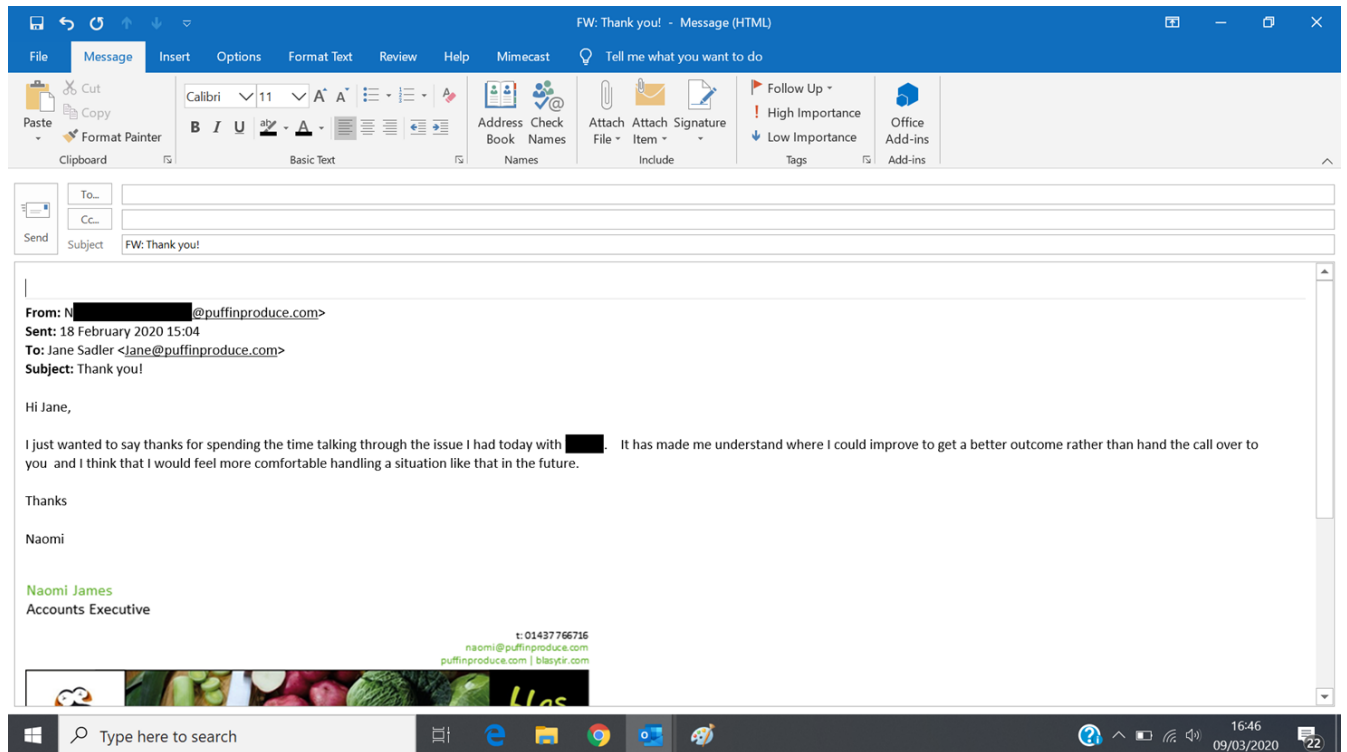
- 1 Problem
- 2 Ideal outcome
- 3 Blocks
Coachee
Others
Situation

1 Ask the coachee to describe the current issue or problem, with specific examples and a small amount of relevant background.
2 Ask her/him to describe the outcome – paint as specific a 'picture' as possible of how things would be if she had sorted out the problem. Do not try to solve the problem, but note down any emerging ideas.
3 With the coachee, list all the obstacles/blocks that lie between 1 and 2.

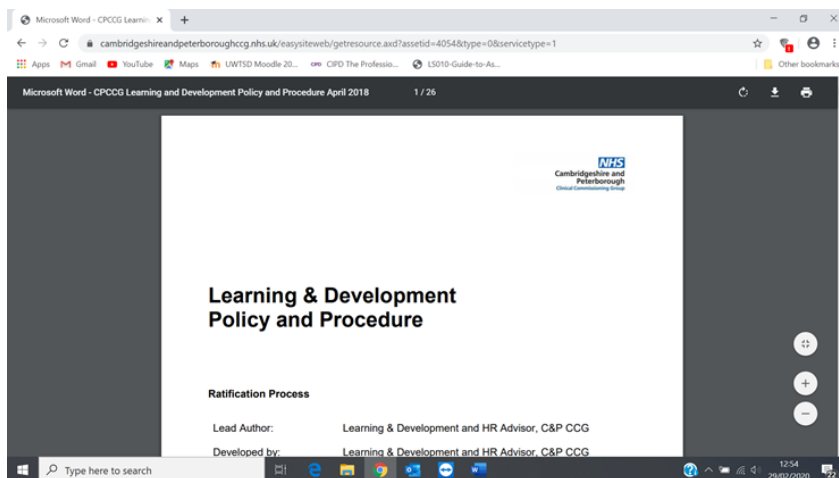
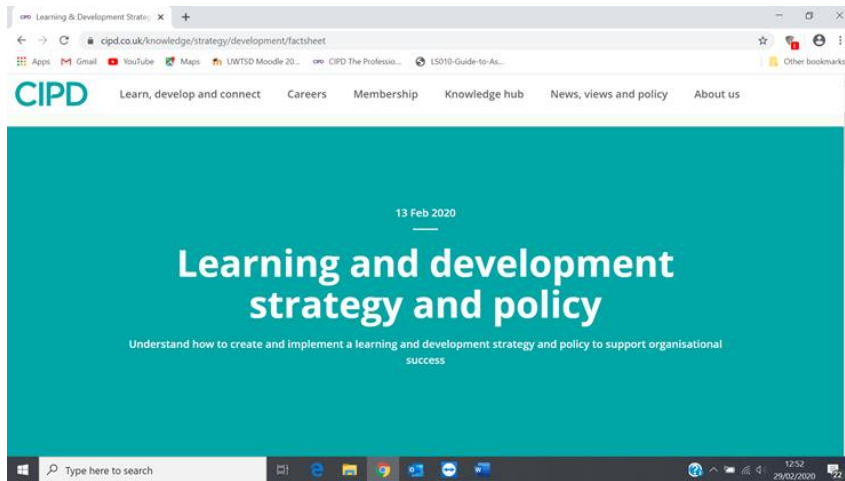
COACHING
THE MANY BENEFITS...

PRODUCTIVITY

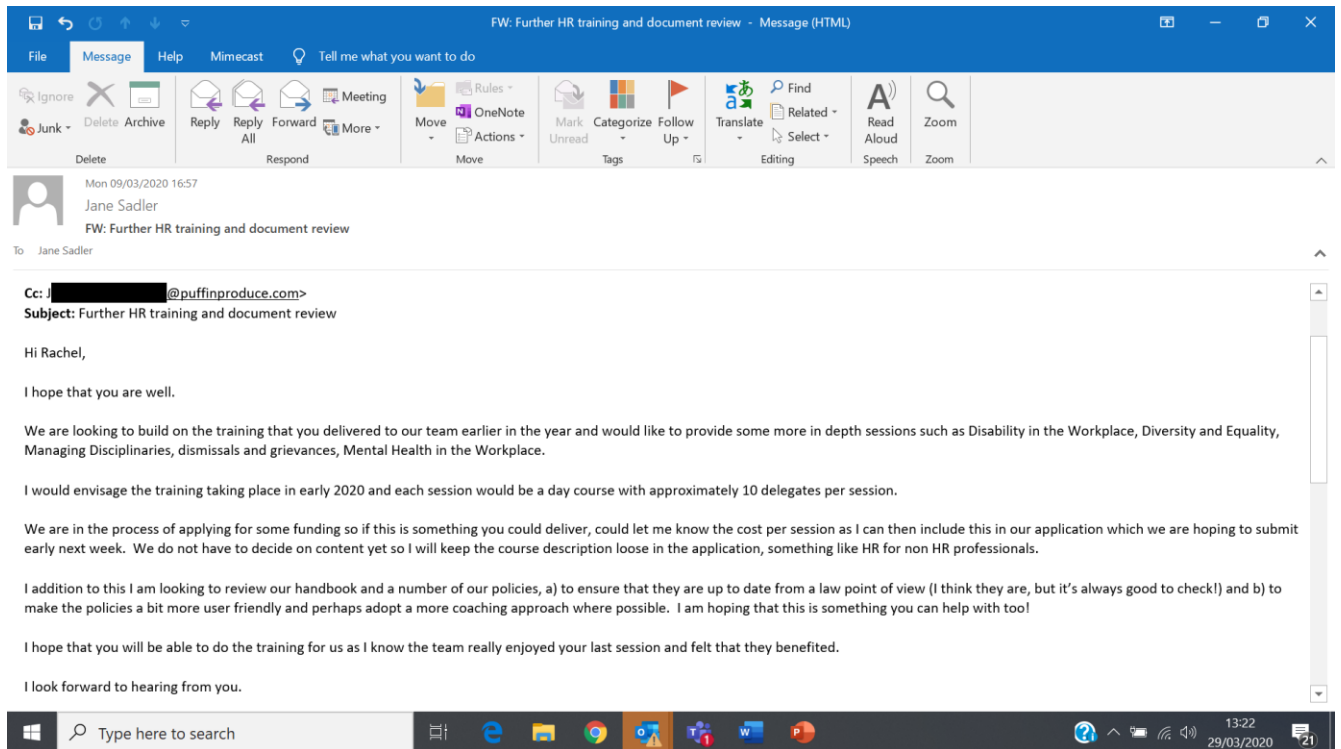
EV21 Email from employee advising that my coaching approach had helped her



EV22 Samples of research into L&D policies



EV23 Email to consultant re document review





Draft Performance Review Document

Goal

What would you like to achieve in work?

How would this benefit you?

How would this benefit the organisation?

Reality

What has been going well and contributing to what you want to achieve in work?

What hasn't been working well for you so far and why?

Options

What can you do to achieve your goal?

Is there anything you can do differently?

Will

What can you do over the next three months that will make a big difference to achieving or accelerating your success?

What support do you need from me to really help you achieve success?

What objectives will you set? (SMART)

How do you objectively measure success at the end?

EV25 Existing Performance review document



Puffin Produce Appraisal Form

Employee name.....

Job Title.....

Date.....

Department.....

	Supervisor comments	A Well ahead of standard	B More than satisfactory – slightly above requirements	C Less than satisfactory-needs slight improvement	D Unsatisfactory- below the standard reasonably expected
Attendance & punctuality What is the employees work pattern of absence/punctuality?		☐ Exceptionally punctual. Very rarely absent.	☐ Attendance levels are exceptional and is rarely late.	☐ Absence and/or lateness levels are higher than average.	☐ Frequently absence or late.
Job knowledge Does the employee have the knowledge to do the job properly?		☐ Exceptional through knowledge of own and related work	☐ Good knowledge of own job and related work aspect	☐ Lack of job knowledge sometimes hinder progress	☐ Inadequate knowledge of own work
Health & Safety Does the employee always follow Hygiene and Health and Safety Policy?		☐ Highly motivated towards safety. Always follows procedure.	☐ A good attitude to safety and encourages others likewise	☐ Sometimes has to be reminded of health and safety procedures.	☐ Disregards basic health and safety procedures.
Teamwork How well does the employee work with others to accomplish the goals of the job?		☐ Works extremely well with others and responds well to new challenges	☐ Co-operative and flexible	☐ Usually gets along reasonably well but occasionally unhelpful	☐ Unco-operative, resists change.
Communication How effective is the employee at verbal and written communication?		☐ Exceptionally effective in written and verbal communication	☐ Usually a good communicator	☐ Some difficulties with written and/or verbal communication	☐ Does not communicate effectively
The Puffin Way How well does the employee demonstrate the values and behaviours?		☐ Always demonstrates numerous core values	☐ Frequently demonstrates core values	☐ Sometimes demonstrates core values	☐ Does not demonstrate core values
Overall Marking		☐ Well ahead of standard performance	☐ More than satisfactory	☐ Less than satisfactory – needs slight improvement	☐ Unsatisfactory – below the standard reasonably expected

Supervisor general comments:

Employee comments:



Return to Work Discussion Form

Name of Employee		Department	
Date of Return To Work Discussion			

Section 1 - Background			
1. Dates of most recent absence.	First date of absence	Last date of absence	No. of days absent
2. Ask the employee why they have been absent?			
3. Did the employee comply with the absence notification process?	Yes	☐	No ☐
If no, ask the employee why and what they think is the impact of not calling in?			
4. Was this absence related to a previous absence?	Yes	☐	No ☐

Section 2 – Introduction	
☐	Welcome back
☐	Update employee on developments/changes in the department
☐	Reassure employee that they are a valued member of the team

Section 3 – Enquire about Health		
1. Ask the employee to explain any any concerns about returning to their role?		
2. Ask the employee if they have visited and doctor and if so to explain any advice given by the GP and how they think this will help t?		
Note advise and ask how they think it will help them going forward.		
3. Are there any underlying problems relating to the absence?	Yes	☐
	No	☐
Note:		

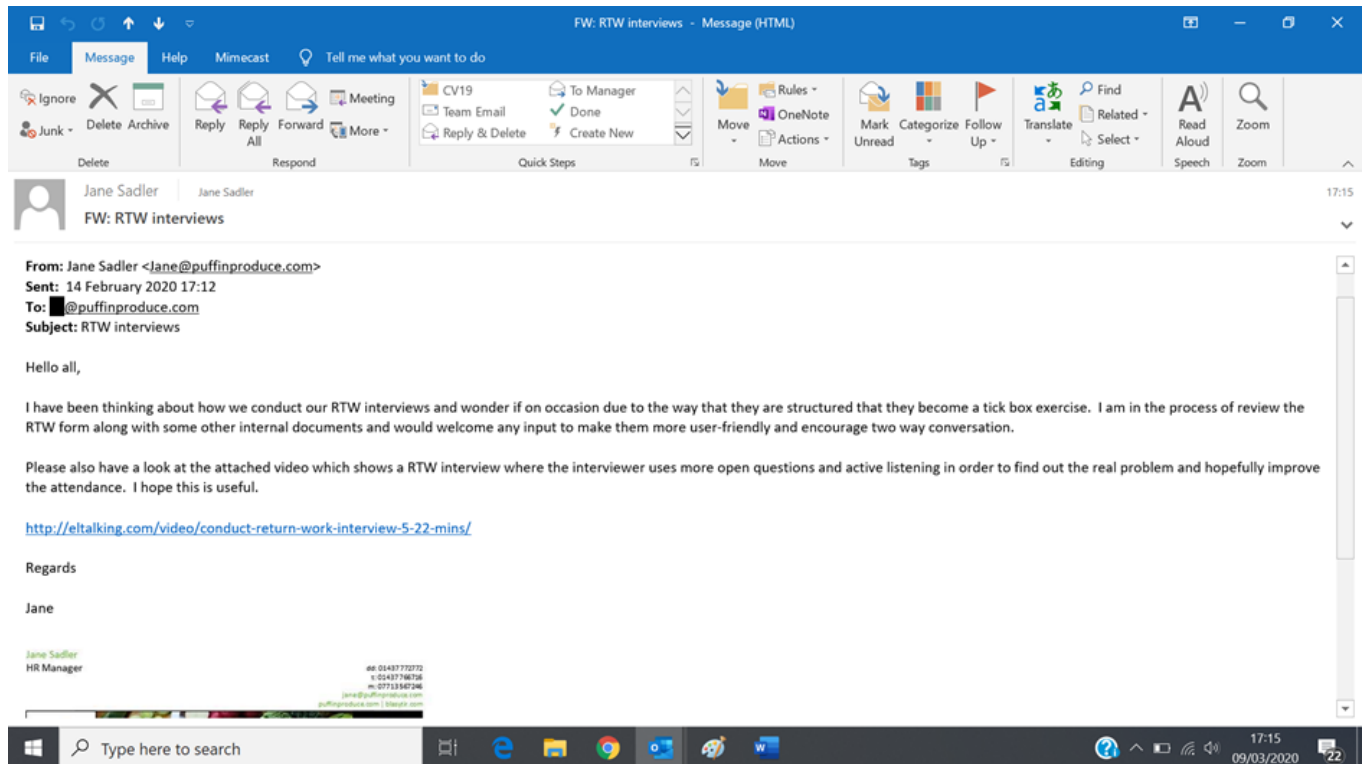
4. Can any assistance be given to the employee by the department, Occupational Health or some other agency?	Yes ☐	No ☐
If yes, please discuss with the employee how they feel it could help them and the Company going forward.		
8. Is any further action/support required?	Yes ☐	No ☐
If yes, please specify.		

Section 4 – Consequences and observations	
☐	Remind employee of the need for good attendance levels.
☐	Draw attention to their attendance record
☐	Ask them to reaffirm how their absence affects themselves, team and wider business
☐	Re-affirm the Company's procedure for managing attendance
☐	Point out consequences of further absences
☐	Check employee understands implications of further absences

Employee Signature		Date	
Line Manager Signature		Date	
Line Manager's Name		Position	

Please send a copy of this form to HR on completion.

EV27 Email to managers providing a link to video showing more open questioning in return to work interview



www.richardastrudwick.com

Puffin Produce: Better working days

This training session will be delivered twice for 2 different cohorts in March 2020; 6th & 13th March. Each cohort will be mixed from different parts of the business, different levels of seniority and experience. This is a deliberate move to enhance relationships and understanding across the organisation.

The venue, food and refreshments are to be booked and paid for by Puffin Produce.

Below is an outline of the day.

The key objectives for the Better Work Days:

- To share tools and tips that help participants proactively influence their psychology on a day-to-day basis.
- To introduce participants to the basic tenants of Positive Psychology.
- To give participants the tools and language to help them to positively effect the working habits of those around them.
- To focus on improvements to time management and team development.

Prep Work

No mandatory preparatory work for this session. Participants are welcome to watch this video on Positive Psychology and happiness https://www.ted.com/talks/dan_gilbert_the_surprising_science_of_happiness

Participants are welcome to complete the free Positive Psychology at Work profiler here <https://www.authentic happiness.sas.upenn.edu/user/login?destination=node/4274> . NOTE: Free sign up needed to complete the profiler. Please complete the PERMA at Work questionnaire.

Session Schedule

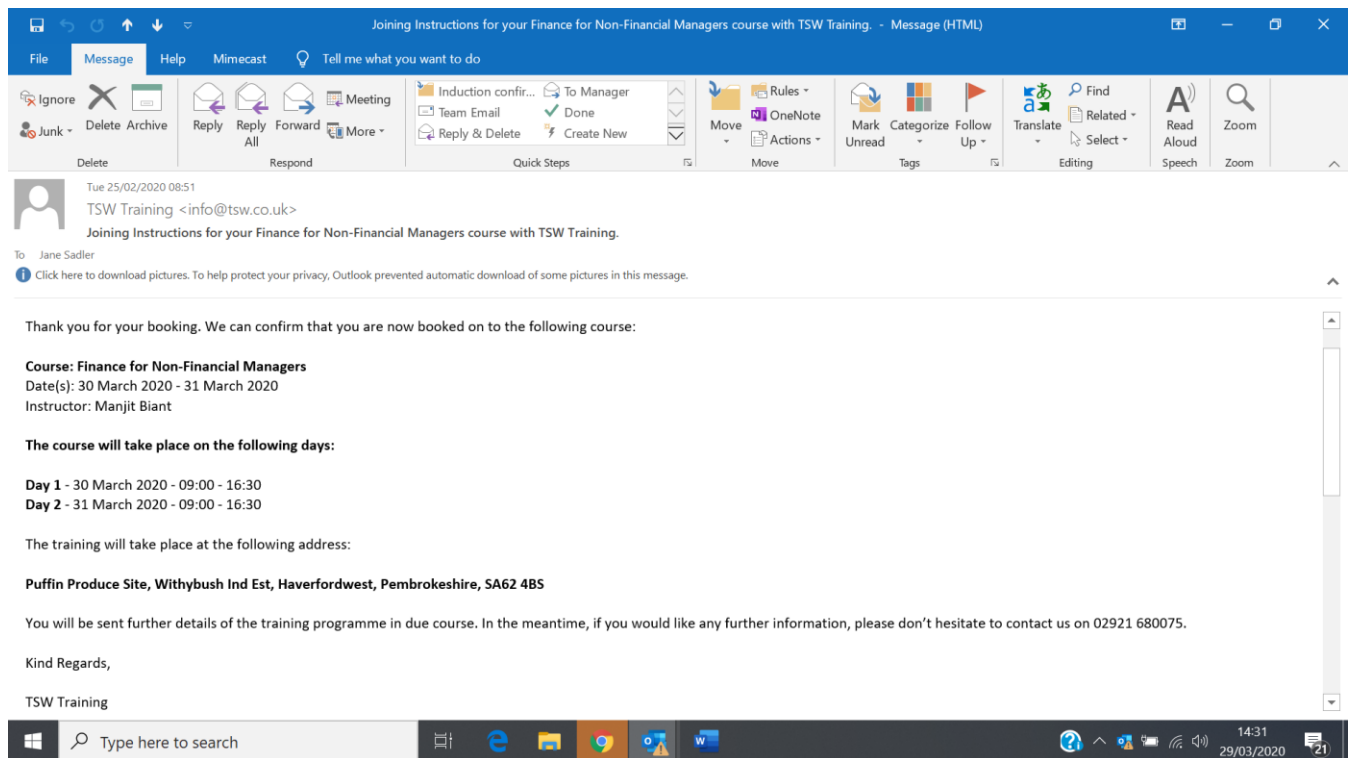
1. Better Work Days

Timings	Activity	Description
9:00	Arrive	Tea & coffee
9:00	Welcome & Overview	Overview of the day, key topics, timings and the 4 objectives

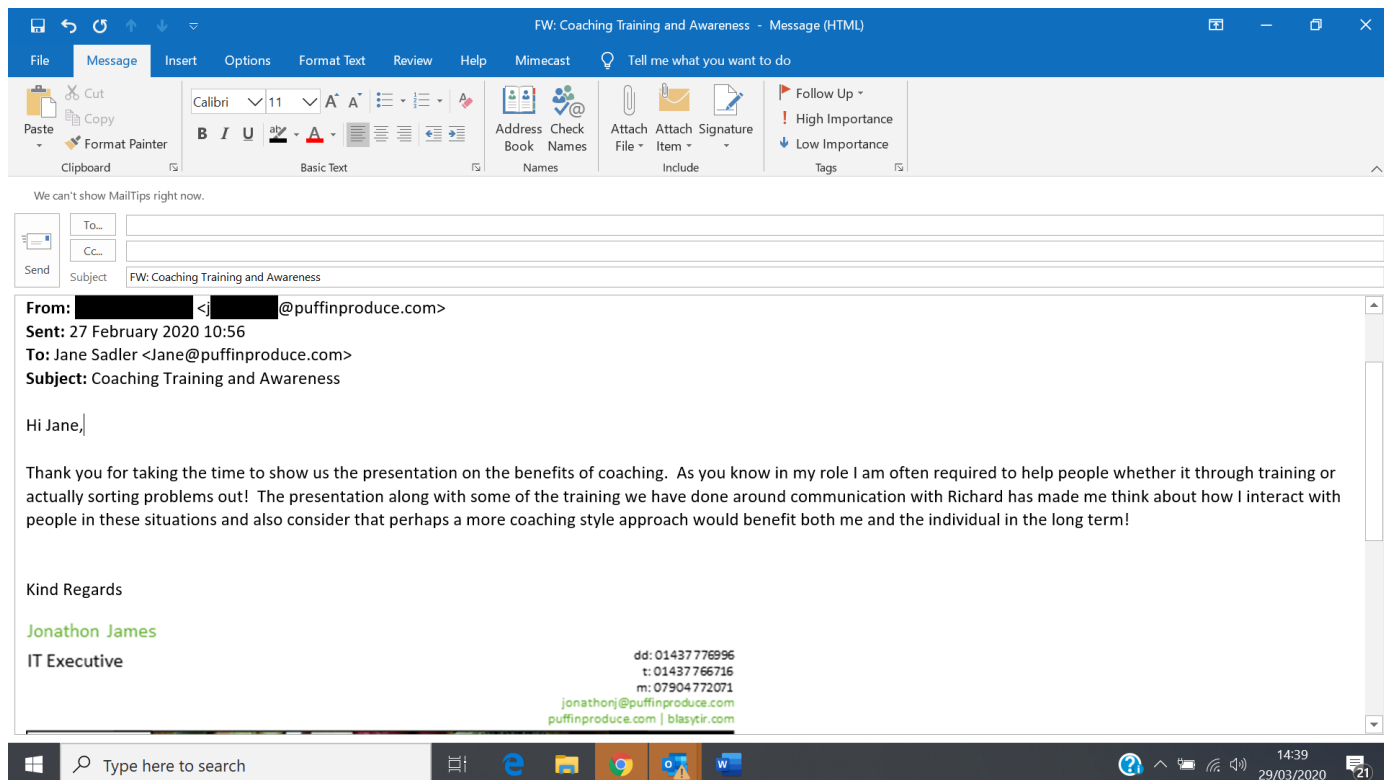
9:05	Session 2 Recap	Run through of the main elements from Session 2: Leaders & Teams
9:10	Leaders and Team Session - Reflect and Debrief	Small group discussion on application of learning, impact and future actions
9:20	Debrief and actions	Group debrief
9:30	Overview and Intro to the content	Overview of the day, discussion of the objectives, application and cumulative effect of all 3 sessions. What would Better Work Days mean?
9:40	Positive Psychology Quiz	Short quiz on happiness
9:50	Introduction to Positive Psychology	The birth of Positive Psychology, its reach and influence. The difference between chronic and acute change.
10:05	Negativity Bias	Overview of the key factors that influence mood and behaviour and our natural inclinations
10:15	Plenary	Group discussion on the above
10:30	Break	
10:45	PERMA	Introduction to the PERMA model and its central position in Positive Psychology
11:05	PERMA Exercise	Focus on you and your happiness. Solo reflection initially and then group discussion on personal behaviours and happiness
11:30	Self Sabotage	Getting out of your own way. Removing barriers, Stop/Start/Continue, temptation bundling and the work of Kurt Lewin
11:45	Coaching Recap	Overview of the key coaching elements covered in Session 1
12:00	Speed Coaching	2x speed coaching sessions as coach. 2x speed coaching sessions being coached.
12:45	Lunch	
13:30	Post Lunch Energiser	Team Energiser - 1-2-3. Sitting circle. Triangles
13:40	Morning Recap	Recap the morning content and note potential personal actions.
13:50	Afternoon Overview	Shift from personal focus to team focus. What can you do for both yourself and others.

14:00	Ideas from the room	Collective brainstorm on flips/post it notes on tips to have better days
14:10	Plenary	Debrief and explore the tips generated by everyone present
14:20	The multitasking myth	Debunking the idea of multitasking, switching costs and attention residue
14:30	Abolishing multitasking	Triad discussion on where multitasking can be reduced in your job, and where you can help reduce it for others
14:45	Debrief	Group debrief
14:55	Eat That Frog	Introduction to Brian Tracy's content on task hierarchy
15:05	Eisenhower Matrix	Introduction to the Eisenhower Matrix as time and task management
15:15	Break	
15:30	Dealing with Change	Revisit the Maslow Skills Grid, the change curve, sunk cost fallacy and loss aversion.
15:45	Will you really change?	Call back to Kurt Lewin and short solo time to reflect on you and change
15:55	Plenary	Group discussion on the tips so far and what might work for you and your team
16:00	Delegation Challenges	SMART targets, goals, milestones, feedback and reviews.
16:15	Agile Methodologies	Tips from agile that speed up feedback loops and
16:20	Team Diagram Exercise : Call Back	Part 3 again : What do we really do? + what do I really do?
16:05	Coaching Recap	Overview of the key coaching elements covered in Session 1
16:10	Speed Coaching	2x speed coaching sessions as coach. 2x speed coaching sessions being coached.
16:50	Actions and debrief	Final agreement to actions and Q&A
17:00	Close	

EV29 Evidence of setting up Finance for Non-finance managers course



EV30 Email feedback from manager re coaching presentation



EV 31 – Meeting with non-managerial key staff from various departments

Meeting notes

25 February 2020

Present

Jane Sadler

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

JS asked if people knew what coaching was and most people responded with references to sports and teaching someone to do something.

Staff did not realise that coaching could be used in a business context so examples of this were explained and also benefits of coaching to individuals were also explained.

Staff felt that they were often just told what to do and that if they made suggestions more often that not they were either not listened to or there was not feedback. They felt that currently there was not a coaching culture.

Most staff said that they enjoyed their work and the teams that they worked in and whilst a little sceptical as to if we could reach a coaching culture they said that they thought that it would be beneficial.

One particular point made was they felt that a more coaching approach as opposed to a command and control approach would improve relationships between them and their managers.

The staff said that they would be interested to take part in any future projects/initiatives that would help build a coaching culture. SA said that she would be happy to coach people if we could give her training.

Action plan to implement and maintain coaching within Puffin Produce Ltd.

Short term	Who
Establish the organisations overarching goals in order to align coaching to achieve company and individual goals. (CIPD,2020)	SMT
Utilise existing staff engagement survey as an indicator of coaching (CIPD 2013)	JS
Establish a Learning and Development Policy (CIPD 2013)	JS/GR
Research suggests that it takes 3-6 months for line managers to become comfortable with coaching (Grant, 2010) therefore for this period ongoing support in the form of 1:1 sessions will be given to increase their confidence with coaching skills.	
Medium Term	
Review and implement new appraisal/PDP system that incorporates coaching. With regard to line managers this should cover a review of how they are developing their teams and rewarding their high achievers as they should be accountable for this development. (Forbes, 2016)	JS/NB
Develop Coaching champions (CIPD, 2019a) and investigate opportunities for them to become qualified, accredited coaches through such organisations as OCM, a CIPD recommended provider. (CIPD, 2020)	GR
Ensure that coaching is an agenda point in SMT and Employee Engagement meetings in to maintain momentum and establish and maintain a coaching culture. (Forbes, 2016) This will assist with behaviour change which normally takes a considerable period of time, (Berkman, 2018)	SMT/JS/NB
Long term	
Introduce a formal mentoring programme to further enhance the learning culture.	SMT/JS/GR

EV33 Email outlining acceptance of action plan and confirming that my actions to date had been effective.

From: N [REDACTED]
Sent: 02 April 2020 07:36
To: Jane Sadler <Jane@puffinproduce.com>
Subject: Coaching Update

Hi Jane,

Thanks for the catch up today, it was good to focus on something positive. The action plan that you have suggested looks good certainly as a starting point to create and embed coaching into the Puffin culture. It is something that I have seen work in other organisations.

I know from speaking to you and some of my team you have already started to make progress in introducing coaching which has been received positively and has been both practical and supporting to a relatively young and inexperienced management team. Well done!

Going forwards the more progress we can make with this the better as I think it will benefit not just those being coached but the organisation as a whole.

Thanks

N [REDACTED]

[REDACTED]

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Head of Operations

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EV34 Email from manager confirming positive behaviour change as a result of coaching.

From: Evaldas Jakubauskas <Evaldas@puffinproduce.com>

Sent: 9 February 2020 10:30

To: Jane Sadler <Jane@puffinproduce.com>

Subject: Positive change

Good morning , I am thinking that you would like to know that I am using more coaching style with my team.

I have noticed that they are showing more positive behaviour and are happy to do more. I think that it is this and I am happy that it is working.

Regards


Storage and Vegetable Manager


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