

COACHING 101: CONDUCTING A COACHING SESSION

This checklist will help you prepare for, conduct and follow up on a coaching session. It follows a logical structure and should make the session run smoothly and effectively.

Using this checklist:

1. Before the coaching session, use the checklist to plan when you will complete each preparation point, and mark them off as you complete them.
2. During the session, remember that the person being coached is ultimately responsible for their own development. The focus should always be on their agenda. So use the checklist as a general guide rather than a rigid structure.
3. After the session, again use the checklist to plan when you will complete the recommended follow up actions and mark them off as they are completed.

Preparing for the session

Action	When	Completed
Work out the priorities for the session.		
Decide where the session will be held. Choose somewhere private and free of interruptions where the coachee will feel comfortable.		
Review all available information about the individual, such as performance or development plans.		
Review the last session and decide what issues or objectives need to be carried over to the next session.		
Slot in time at the start of the session to review the individual's progress since the last session.		
Identify development objectives and think through learning objectives for the individual.		
Note down areas to be covered during the session.		
Identify appropriate potential activities for the individual following the session.		
Put in place any resources required or any necessary budget provision.		
Draw up a plan to structure the session in a logical fashion.		
Decide the style of coaching you think will be appropriate to the individual.		
Work out, in outline, how you will approach the session.		

Conducting the session

Action	When	Completed
Put the individual at ease.		
Discuss and agree the learning objectives and agenda for the session.		
Review progress since the last meeting. Celebrate achievements and discuss further support if necessary.		
Work through the items in the agreed agenda, allowing the coachee to put forward their views or ideas first.		
Relate any learning points directly back to the individual's job.		
In the second half of the session, focus on opportunities for the individual to practise what they have learned back on the job.		
At the conclusion of the session, summarise the main learning outcomes that have emerged.		
Agree with the individual what they are going to do following the session, the timescales and who else will be involved.		
Ask the individual what they would like you to do to help.		
Agree the date, time and venue for your next session.		

Following the session

Action	When	Completed
Make brief notes of what was covered.		
Conduct a review to evaluate how successful the session was and how you can improve the next one.		
Work out how you will keep in touch with the individual, observe what he/she is doing and obtain feedback from others involved.		
Diarise any actions necessary to progress any of these actions.		
Briefly talk to anyone who will be involved in what the individual will be doing as a result of the session.		
Arrange for any necessary resources to be put in place.		
Work out your expectations for what the individual will achieve before the next session.		
Think how you will carry out the actions you have agreed to.		
Plan for the next session.		