# COACHING
## FOR SUCCESS

**MOTIVATING AND MANAGING *AND EVEN FIRING*
FOR IMPROVED EMPLOYEE PERFORMANCE**

**Service Quality Institute**
*The Global Leader in Customer Service*

## LEADER GUIDE

# SECTION 1:
# Introduction

## Warm-Up Activity: Role-Play

FORMAT: SMALL GROUPS OF 3 | EQUIPMENT NEEDED: NONE

**NOTE:** The warm-up activity is not found in the Participant Manual.

**PURPOSE OF WARM-UP ACTIVITY:** ROLE-PLAY THAT ALLOWS PARTICIPANTS TO INTRODUCE THEMSELVES WHILE FOCUSING ON THEIR ROLE AS A MANAGER AND COACH. DESIGNED TO BUILD A SENSE OF CAMARADERIE AND HELP EVERYONE REMEMBER EACH OTHER'S NAMES AND SITUATIONS.

The Warm-Up Activity should take 5-10 minutes. Use a timer, stopwatch, or smartphone to track time. Give each participant no more than 1 minute to perform their role-play. (NOTE: There is no opting out, they must participate even if they have not experienced a difficult situation as an employee. Ask them to role-play an experience as a customer, or an experience a family member or friend may have had).

**LEADER TEXT:** Welcome to Session 1 of Coaching for Success. For those of you who don't know me, my name is (YOUR NAME), and I'll be acting as Group Leader during this session. As Group Leader, I'll be providing some framework for our discussions, but each of you will be helping one another as we go along.

Now that you know me, I'm going to have each of you introduce yourselves, but a little differently. You will each introduce yourselves through a new hire interview. You will pair up with another participant and you will play the part of a hiring manager, while your partner will do their best as an employee to get hired.

So take a minute to think about what you would like to ask as a manager, or how you would like to present yourself. You can either play a part, or play yourself.

(Give participants a few minutes to take notes.)

Okay, let's begin. Managers start your interviews and take notes about the employee. After you're done, switch roles.

(Allow participants to conduct their interviews. Roam the room and listen in on what they are talking about. Offer any suggestions if participants seem stuck.)

(After about 5 minutes bring the exercise to an end.)

Is everyone done conducting their interviews? Great. Now I want each of you to come to the front of the room, and as the manager I want you to try to sell the rest of us on the employee you just interviewed. Think of us as your board or your C-suite. You need to get our approval, by telling us as much about the employee as you can and either singing their praises, or dumping them.

(Bring the first pair to the front and have the manager introduce the employee to the group.)

(This is meant to be a fun exercise. Push them to go over the top with their characterization. Provide little to no instruction, but take note of those who perform well to highlight and call upon later for modeling.)

Great job everyone. As you have all experienced, interacting with a member of your team can be exciting, stressful, and instructional. You did quite well in introducing us to your prospective team members. Our goal during this program is to get you thinking more about the employees you serve and how you can successfully coach and facilitate their performance through every interaction you have with them, from the initial hiring interview to quarterly reviews and daily feedback.

**END OF WARM-UP ACTIVITY**

**LEADER TEXT:** Managing employees used to be like marshaling troops for battle. Managers were expected to command and control their workforce and rule with a heavy hand. The modern manager is more of a partner or coach. Your goal is to work for and with your team to put each of them in the best place to succeed. By doing that we all win. You are recognized for your leadership. Your division is recognized for its productivity. Your employees are recognized for their performance. And the organization is recognized by increased profits.

The goal of this program is to get you to utilize the skills and abilities you already have to properly manage and collaborate with your employees, coach them through difficult situations, and improve performance. It won't be easy, but your organization has decided to put its trust in you to make the empowered decisions necessary to positively affect success. We will also talk about the necessity of coaching an employee out of the organization, an unfortunate, but sometimes necessary step.

During these two sessions you will hear some information about successful strategies for setting up expectations with measureable metrics, providing quality feedback, reviewing performance, and offering recognition. We will also talk about the importance of acting quickly, meaning what you say, and being knowledgeable.

(Distribute copies of the Participant Manual.)

**LEADER TEXT:** These copies of the Coaching for Success Participant Manual are yours to keep. We would like you to read and complete all of the assignments and exercises as we go through the program. The material is designed to stimulate discussion and get us thinking about the concepts of coaching and leading your teams. Use the Participant Manual as we go through the program to take notes, highlight key ideas, and write down any questions, comments or ideas you might have.

This session will be structured around our group discussions and the videos we will watch. The vignettes in the videos are designed to get us to think about the issues presented. There will be questions based on the situations shown and on your own experiences. There are no right or wrong answers to these questions, so don't be concerned. Our goal is to look at what we're doing, and find better ways to improve our interactions and communications with our team members.

**LEADER TEXT:** The first video introduces us to the Coaching for Success program and the concepts that we will cover throughout this session. Afterwards, we will go through the questions in Exercise 1.

# VIDEO SCRIPT OF SESSION 1: SECTION 1

**Running Time: 7 minutes, 3 seconds**

**NARRATOR:** Hello and welcome to Coaching for Success: Managing, Motivating (and even firing) for Improved Employee Performance. This program is brought to you by the Service Quality Institute.

Today we are going to focus on one of the most difficult jobs for a manager… coaching your employees to bring out their best and increasing everyone's level of success. Successful organizations can set themselves apart in many ways. They can deliver a highly specialized and first-rate product. They can deliver exceptional service to their customers. And they can promote highly driven, accomplished employees. That's where coaching comes into play -- teaching and motivating employees to work to their full potential and achieve success.

When companies treat their employees well, coach them effectively and continually work to motivate productive actions, then everyone wins. When you get the right people on board working toward a common goal this can be a simple task.

If you're good – and maybe a little lucky – your coaching will always lead to high-achieving and happy employees. But who is ever that lucky? Most of us will have to terminate an employee who does not find success. In truth, when employees clearly understand your expectations, but still fall short, coaching them out of your organization can often be the best option for everyone. It is up to you to stay on top of that progress and take the necessary steps.

The lessons and techniques described in this program can help you:

- *Improve your daily interactions with all of your employees,*
- *Improve their level of job performance,*
- *Help you create and facilitate effective teams, and*
- *Give you the confidence needed to deal with underperforming employees.*

During this training session, we will introduce you to Coaching for Success, a strategy designed to help you deal with your employees so that you can either get the most out of them, redirect their efforts, or outplace them when necessary.

Using these methods you will find the self-confidence to move beyond just superficial boss/employee relationship. As the coach you are the head collaborator and lead facilitator for your team. You are in the best position to maneuver your employees to where they have the best opportunity for success, and motivate them to perform beyond your expectations.

You won't shy away from conflict or the tough decisions required by your position. You will work with problem employees to overcome deficiencies and improve everyone's behavior, output, and overall performance.

Dealing with problem employees can take a lot of effort, but handling exceptional employees can be just as daunting for any manager. Different issues. Different expectations. Different results every time.

Have you ever found yourself in the middle of employee encounters like these?

> **Manager:** Hey Julian. Thanks for coming in. I specifically requested you because you've been doing such a great job on the loading dock.

**Employee:** Thanks, I like 3rd shift. It gives me more time to focus on my classes during the day.

**Manager:** I'm glad to hear it. What are you studying?

**Employee:** Computer science with a focus on Systems Management.

**Manager:** It looks like you have a bright future ahead of you. I hope it is with our company. We need more employees like you.

**Manager:** How did this happen?

**Employee 1:** I don't know.

**Manager:** This came right off the line from third shift. Didn't it go through the QA procedure?

**Employee 2:** Everything goes through the Quality Assurance procedure. I don't know how this was bypassed.

**Manager:** I understand this does happen occasionally-

**Employee 2:** More than it should. I don't know what's going on in QA lately.

**Manager:** What's the status of the rest of today's product?

**Manager:** Kyle, by the way, I asked Rebecca from HR to sit in on our conversation.

**Employee:** Whatever.

**Manager:** I heard the confrontation out there just now. That is not how we do things around here.

**Employee:** Hey, I've been handling schmoes like that for years. It's Fine.

**Manager:** They're not schmoes, they're our customers.

**Employee:** If they can't see the error of their ways-

**Manager:**   I'm letting you go effective immediately.

**NARRATOR:** How do you think you would have handled any of these employees if they worked for you? How would your organization or your manager expect you to respond?

Coaching for Success is all about

- *Understanding,*
- *Clarity,*
- *Feedback, and*
- *Motivation.*

You want to show your employees, from your highest performers to your lowest, that YOU are there for them. You are the head collaborator. You provide them with the tools and the direction they need. You will do what ever it takes to put them in the position to succeed. To do this you need to understand them. You need to offer constructive and goal-oriented feedback. Doing all this will provide you with all of the information and tools you will need to effectively motivate them.

In this program you will learn:

- *Who are your employees and what do they want*
- *Partnering with your employees to set and manage expectations*
- *The importance of continued training and team building*
- *Effective strategies for evaluating employee performance*
- *4 steps for providing effective feedback*
- *Recognizing employee accomplishments and motivating continued success*
- *4 steps for dealing with poor performance*
- *How to make the necessary decisions to separate and terminate, and*
- *How to recover and rebuild your team to maximize performance.*

Your group leader will direct you through each section of the program and facilitate a series of discussions. Ask questions as often as possible, and try to provide honest answers based on your personal experiences - there are no right or wrong answers.
You may be familiar with some of the themes we will discuss and others may be new to you. When we are done you will have the knowledge and skills you need to confidently and effectively handle any situation and any employee you might face on the job.

**END OF VIDEO SCRIPT SESSION 1: SECTION 1**

# EXERCISE 1:

FORMAT: LARGE GROUP  |  EQUIPMENT NEEDED: NONE

**Exercise 1 is found on page 15 in the Participant Manual.**

**PURPOSE OF EXERCISE 1:** GET PARTICIPANTS THINKING ABOUT THEIR ROLE AS LEADERS AND FACILITATORS.

**LEADER NOTE:** To stimulate discussion early in the program, it is helpful to ask participants to write down answers to questions before group discussion, depending on the time available and the makeup of the group.

**LEADER TEXT:** Exercise 1 is located on page 15 in your Participant Manual. It discusses the information presented in the video as well as the Warm-Up Activity we just completed. Please take a few moments to complete the exercise.

Allow participants a few minutes to complete the questions. It is very important that participants write their responses in their books. Clean books will not be read or used. When this happens we fail in our attempts to teach and instill these skills.

**Participant Manual Question 1:** What is your reaction when your employees exceed your expectations? What do you tell them? What do you tell others?

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This exercise is designed to get participants thinking about how interacting with their employees when they perform above and beyond expectations. Are participants aware of agreed upon expectations on a daily basis and do they work to facilitate and promote success through their actions and feedback. Do you have a system set up to recognize success? If so, how does it work and how do employees respond? If not, why, and do you think such a system could have an impact? What is the standard reward for meeting or exceeding expectations? Right this second do you know what tangible results or goals are expected of the members of your team?

**Participant Manual Question 2:** How do you react when another employee or a customer complains about an employee's performance?

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Build on the previous answers from Question 1. Call out a few participants and get them to recall a specific incident or employee interaction and try to get them to elaborate how they reacted and how the employee responded.

**Participant Manual Question 3:** How often do you review employee performance? Describe the process.

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Consistent and continual performance review every quarter is an essential tenant of the Coaching for Success program. We want participants to start thinking about their role in the review process and how they can better partner with their employees to develop actionable goals. If employee performance is not reviewed quarterly, how often is it reviewed? What action is taken following a review? Would more frequent reviews yield different or better results? This question is just a teaser for the more significant discussion about performance reviews in Section 5.

**Participant Manual Question 4:** How do you think your employees perceive you as a manager and coach?

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How do participants perceive themselves as managers and coaches? Most of us would tend to think of ourselves in the most positive light, but try to get participants to think as objectively as they can. How would a specific employee describe you to a co-worker or a family member? What personal and professional attributes make you an effective coach? What attributes do you think you could work on to improve your interactions with your team members?

**Participant Manual Question 5:** Have you ever had to fire an employee for poor performance? Describe the situation. How did it make you feel?

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Firing employees is never fun, but it can be necessary if all other avenues for improving performance have been exhausted. Take note of the participants' responses and return to those feelings during the later section on coaching employees out of the organization.

**LEADER TEXT:** Continuing to motivate high performing employees and coaching up low performing employees are the cornerstones of your role as a team leader. These situations represent an opportunity to put your skills to the test. As we will see in the upcoming sections, your team members are people too, with the same personal issues and unique life events that affect what they want and need. Working with them as a coach can help you put them in the best position to succeed for everyone's sake.

**END OF EXERCISE 1**

**LEADER TEXT:** The video mentioned the specific objectives for the entire program. Today, during Session 1, we will specifically focus on:

• *Understanding the mindset of your employees*
• *Partnering with your employees to set and manage expectations*
• *Building successful teams through continued training and instruction*
• *Developing effective strategies for evaluating employee performance*

These objectives will build upon each other throughout the Session so that in conjunction with the objectives for Session 2, you should have a well-rounded understanding of the skills and techniques presented. Your ultimate goal is to leave this program with the confidence and competence to lead and coach your teams to get the most out of them.

Let's get started by discussing the employee and their mindset.

**LEADER NOTE:** To begin the next section, go directly to the next video on page 41 of the Leader's Guide.

## Notes and Ideas for Section 1

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