

Individual being coached

Date

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| S | <p>Situation</p> <ul style="list-style-type: none"> > Identify what triggered the coaching opportunity (e.g., performance deficiency, growth opportunity, communication breakdown) > Determine where the teammate has been, is currently and would like to be/go > Align teammate expectations with yours (“the true reality”) |
| C | <p>Competencies</p> <ul style="list-style-type: none"> > Identify the specific teammate competency gaps impacted by the coaching opportunity > Use development opportunities to address needed knowledge, skills and abilities |
| O | <p>Obstacles</p> <ul style="list-style-type: none"> > Identify specific challenges that may prevent the coaching intervention from positively impacting the teammate in question (e.g., personality conflicts, work environment, job demands) > Determine specifics of how the obstacles will be addressed (who, what, when, how, why) |
| R | <p>Resources</p> <ul style="list-style-type: none"> > Determine specific support mechanisms to aid in the coaching process > Could include mentors, job aids, ongoing 1-on-1 feedback and discussion, professional readings, workshops and formal training |
| E | <p>Engagement</p> <ul style="list-style-type: none"> > Hold the teammate accountable for driving the process > Agree to a schedule in which the two of you will meet regularly to determine progress towards the goals and expectations that have been set up front > Vary the experiences (opportunities) to allow for different learning modalities (and to keep it “fresh”) |

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