Coaching

Toolkit
Coaching: An Ongoing Process

Effective coaching is an ongoing process with each of your Provider Representatives. For each coaching conversation, you will need to develop a focused **plan**, you need to **implement** coaching, and finally to **evaluate** the Provider Representative’s progress afterwards. The coaching conversation should focus directly on the Provider Representative’s specific **tasks** and **behaviors**.

For each coaching conversation, you will need to:

- Develop a focused **PLAN**.
- **IMPLEMENT** coaching.
- **EVALUATE** Provider Representative’s ongoing progress.
Coaching: Using the PLAN-IMPLEMENT-EVALUATE Framework
The process of coaching includes the need to PLAN, IMPLEMENT, and EVALUATE (PIE).

**PLAN – Prepare to Coach/Observation and Assess**
- Review action steps from the last Co-Visiting Report and/or coaching conversation. Review data, action plans, and MBO’s.
- Prioritize which aspects of current performance you plan to address during the coaching conversation.
- Assess the Provider Rep’s Ability and Willingness to perform a specific task (Can’t/Won’t, Could, or Can). Plan how to match your coaching style (Directive, Participative, or Encouraging) to the Provider Rep’s task-specific Ability and Willingness.
- At the beginning of the coaching conversation, discuss the Provider Representative’s overall objectives (e.g., account strategy, provider discussions, specific issues, etc.).
- Observe Representative’s performance with provider and/or colleagues.

**IMPLEMENT – Provide Feedback**
- Observe Provider Representative’s performance with provider and/or colleagues.
- Offer the Provider Representative the opportunity to analyze his/her performance.
- Assess how effectively the Provider Representative demonstrated the tasks observed. Refer to performance standards/competencies for PBCC.
- Focus on one to three tasks to discuss.
- Provide feedback based on observable behaviors, no judgments.
- Explore ideas for getting results, improvement, and development.
- Commit to action.

**EVALUATE – Establish Coaching Continuity**
- Document action steps, milestones, and accountability for achieving performance and development objectives.
- If the coaching conversation occurs during a field visit, complete a Co-Visiting Report.
- Create coaching continuity by monitoring completion of action steps and providing positive reinforcement and guidance as appropriate.
- Plan for the next coaching conversation.
When planning for a coaching conversation, identify the specific tasks/skills to focus on during the interaction. A Provider Representative’s performance readiness can be described as a combination of demonstrated task-specific ABILITY and WILLINGNESS. Managers should be:

- DIRECTIVE with those who CAN’T or WON’T perform the specific task;
- PARTICIPATIVE with those who COULD perform the specific task; and
- ENCOURAGING with those who CAN perform the specific task.

A Provider Representative’s performance readiness may vary by task. For example, you may need to adopt a Directive coaching style for one task and a Participative coaching style for another task.

Refer to the PBCC performance standards for skills and behaviors. The standards show people what good looks like.
## Performance Readiness Behaviors: What You Observe

### PROVIDER REPRESENTATIVE READINESS LEVELS

<table>
<thead>
<tr>
<th>CAN’T/WON’T</th>
<th>COULD</th>
<th>CAN</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CAN’T</strong></td>
<td>Needs to Learn the Basics</td>
<td>Needs to Expand Skills (Enthusiastic but Needs Experience)</td>
</tr>
<tr>
<td>• Lacks skill and experience, does not see clearly how to move forward or know what resources to draw upon.</td>
<td>• Asks questions and seeks clarity.</td>
<td>• Makes optimal decisions about how to get results.</td>
</tr>
<tr>
<td>• May be unaware of performance issue.</td>
<td>• Enthusiastically takes on more than he/she can handle.</td>
<td>• Develops fresh approaches to meeting customer needs.</td>
</tr>
<tr>
<td>• Lacks confidence in own ability to build provider and internal relationships and achieve results.</td>
<td>• Delivers results but may experience setbacks.</td>
<td>• Proactively alerts you to problems and opportunities.</td>
</tr>
<tr>
<td><strong>WON’T</strong></td>
<td>Needs to Turn Around</td>
<td>Needs to Engage (Experienced but Demotivated)</td>
</tr>
<tr>
<td>• Demonstrates unacceptable performance (does not meet performance expectations) or marginal performance (barely meeting minimum expectations) on a sustained or intermittent basis.</td>
<td>• Avoids taking initiative or avoids the Manager.</td>
<td>• Assists in the development of other Provider Representatives.</td>
</tr>
<tr>
<td>• Demonstrates ability but shows evidence of poor motivation or attitude.</td>
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### MANAGER COACHING STYLE

Match your coaching style to the Provider Representative’s performance readiness for a specific task. A Provider Representative’s performance readiness level may vary based on his/her Ability/Willingness to perform a particular task.

<table>
<thead>
<tr>
<th>DIRECTIVE</th>
<th>PARTICIPATIVE</th>
<th>ENCOURAGING</th>
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</thead>
<tbody>
<tr>
<td>High Guidance</td>
<td>Balanced Guidance and Support</td>
<td>High Support</td>
</tr>
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</table>
## Manager’s Coaching Style: What You Do

### DIRECTIVE
**High Guidance**

<table>
<thead>
<tr>
<th>Be Directive With Can’t</th>
<th>Be Directive With Won’t</th>
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<tbody>
<tr>
<td>• Provide specific direction about what and how.</td>
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<tr>
<td>• Describe what they most need to learn.</td>
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<tr>
<td>• Team the Provider Representative with an experienced peer and/or meet regularly to provide feedback.</td>
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<tr>
<td>• Provide opportunities to practice and any training needed to build skills.</td>
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<tr>
<td>• Offer encouragement and positive feedback and express confidence, when appropriate.</td>
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<tr>
<td>• Check in regularly with Provider Representative.</td>
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<td>• Clearly communicate need for improved performance against standards.</td>
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<td>• Describe consequences of failure to improve.</td>
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<td>• Closely supervise performance improvement efforts.</td>
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<td>• Contact HR and Next Level Manager.</td>
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<tr>
<td>• Provide a written action plan describing specific performance expectations that must be met within a specified time frame.</td>
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### PARTICIPATIVE
**Balanced Guidance and Support**

<table>
<thead>
<tr>
<th>Be Participative With Could (Needs to Expand Skills)</th>
<th>Be Participative With Could (Needs to Engage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ask employee how he/she would approach the situation; support employee’s ideas when possible.</td>
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<tr>
<td>• Modify ideas and suggest other approaches or resources, as appropriate.</td>
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<td>• Set realistic limits for employee’s efforts at new tasks.</td>
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<tr>
<td>• Discuss and clarify mutual expectations with regard to initiative or “checking in.”</td>
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<tr>
<td>• Discuss how behavior impacts team/individual performance and provide examples.</td>
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<tr>
<td>• Determine if employee needs more direction or if they can improve behavior on their own.</td>
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<tr>
<td>• Explore root causes and agree to needed changes.</td>
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</tbody>
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### ENCOURAGING
**High Support**

<table>
<thead>
<tr>
<th>Be Encouraging With Can</th>
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<tbody>
<tr>
<td>• Outline and clarify desired outcomes.</td>
</tr>
<tr>
<td>• Let employee decide on what and how.</td>
</tr>
<tr>
<td>• If asked, share ideas or best practices.</td>
</tr>
<tr>
<td>• Run interference and eliminate barriers.</td>
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<tr>
<td>• Continue to offer feedback.</td>
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</tbody>
</table>
Coach O.F.T.E.N.

Now that you're clear about what you have observed and which coaching style to use, it is time to coach your Representative. The Coach O.F.T.E.N. Guide details a suggested structure for your coaching conversation.

**O**pen
- Establish purpose and tone
- Ask for their view

**F**ocus
- Focus on one to three tasks to discuss

**T**ransition
- Offer feedback
- Describe observable behaviors, benefits

**E**ngage
- Explore ideas for improvement, development

**N**ext steps
- Commit to action
## The Coach O.F.T.E.N. Guide

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### OPEN
- Offer the Provider Representative the opportunity to share his/her view of task performance.
- Review performance against standards (PBCC standards, PSI Quality Standards).
- Provide clear guidance about what the Provider Representative needs to learn and/or why performance needs to improve.
- Offer the Provider Representative the opportunity to share his/her view of task performance.
- Review performance against standards (PBCC standards, PSI Quality Standards).
- Establish an open tone and acknowledge what the Provider Representative did well and any areas for improvement on the task.
- Establish an appreciative tone and acknowledge the Provider Representative’s positive impact on results and relationships.

### FOCUS
- Identify one or two tasks that most impact performance and the negative impact on results and others as the Focus of the coaching conversation.
- Identify one or two tasks that most impact performance and the positive or negative impact on results and others as the Focus of the coaching conversation.
- Identify one or two tasks that most impact performance and the positive impact on results and others as the Focus of the coaching conversation.

### TRANSITION
- Describe observable behaviors and gain agreement that information/training is needed or that a problem exists.
- Describe observable behaviors and gain agreement on how to take performance to the next level.
- Describe observable behaviors and note any current or future challenges that could be a barrier to sustaining high performance.

### ENGAGE
- Tell the Provider Representative what to do differently and how to complete or improve on the task.
- Ask questions to discover what and how the Provider Representative has been getting results; solicit his/her ideas for taking performance to the next level and support them, when possible.
- Learn more about how the Provider Representative is getting the desired results and develop possible solutions to any challenges or barriers.

### NEXT STEPS
- Develop a plan of action for what the Provider Representative will do to improve and how you will follow up.
- Negotiate a plan of action for what and how the Provider Representative will continue to achieve results, develop further, and how you will follow up.
- Support a plan of action for what you and the Provider Representative will do to sustain high performance and how you will follow up.
Evaluate Ongoing Progress

As a Manager, you need to continually evaluate and document your Provider Representatives’ performance against PBCC standards and objectives.

If the coaching conversation occurs during a field visit, you also need to document your performance observations in the Co-visiting Report.

Create coaching continuity by monitoring completion of action steps and providing positive reinforcement and guidance on an ongoing basis.
Coaching

STEP 1 – PLAN FOR CO-VISIT
• Review data
  ▪ Co-visiting Reports
  ▪ Personal notes
  ▪ Sales and activities results
  ▪ Progress on previously agreed-upon actions
  ▪ MBO
  ▪ Provider plans
• Determine focus for co-visit coaching
  ▪ Assess Provider Representative’s Ability/Willingness to complete a specific task (Can’t/Won’t, Could, Can)
  ▪ Determine coaching style (Directive, Participative, Encouraging)

STEP 2 – REVIEW BUSINESS AND SET COACHING OBJECTIVES
• Meet with the Provider Representative prior to the first interaction to review:
  Specific Providers  Providers scheduled for the co-visit

STEP 3 – ESTABLISH INTERACTION OBJECTIVES
• Prior to each interaction, discuss with Provider Representative:
  Provider plans  PBCC objectives

STEP 4 – OBSERVE Provider Interactions
• For each interaction:
  ▪ Observe Provider Representative’s interactions with providers/colleagues
  ▪ Compare actions and results observed during interactions with the defined objectives
  ▪ Assess how effectively Provider Representative accomplished the task within each competency (refer to the behaviors listed in the Co-visiting Report)

STEP 5 – PROVIDE FEEDBACK ON PERFORMANCE
• After each interaction and at the end of the co-visit, use the Coach O.F.T.E.N. Guide to structure the coaching conversation with the appropriate coaching style:
  ▪ OPEN – Establish tone, set purpose for discussion, encourage Provider Representative to analyze performance
  ▪ FOCUS – Identify tasks that impact performance and impact on results and others
  ▪ TRANSITION – Describe observable behaviors, gain agreement
  ▪ ENGAGE – Explore ideas for getting results, improvement, and development areas

STEP 6 – Establish Coaching Continuity
• At the end of the co-visit:
  ▪ Review co-visit objectives and provide honest and fair feedback
  ▪ Agree on Next Steps and provide additional support that will be helpful to the Provider Representative
  ▪ Take notes and complete the co-visit reports