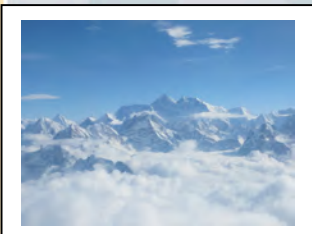




# Coaching

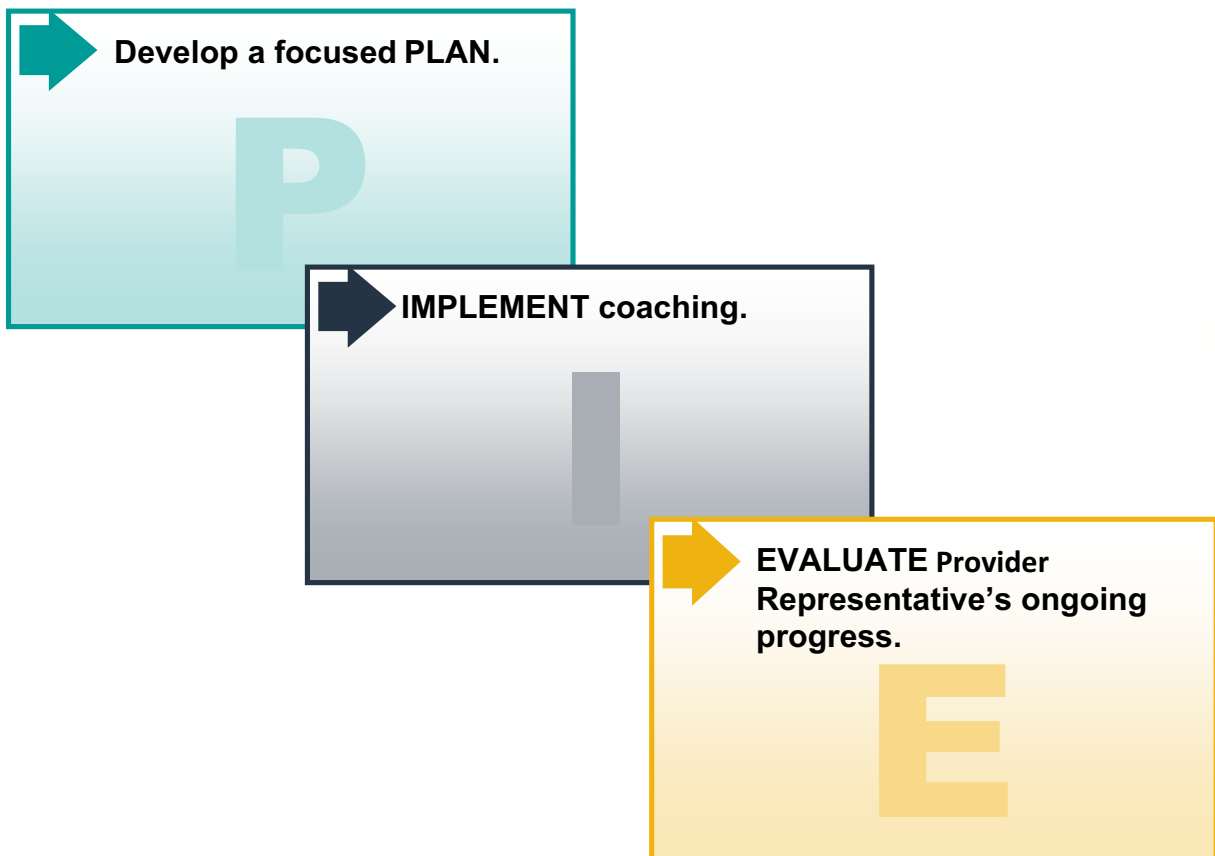
## Toolkit



## 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:



# Coaching:

## Using the PLAN-IMPLEMENT-EVALUATE Framework

The process of coaching includes the need to PLAN, IMPLEMENT, and EVALUATE (PIE).

### PLAN – Prepare to Coach/Observe 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.

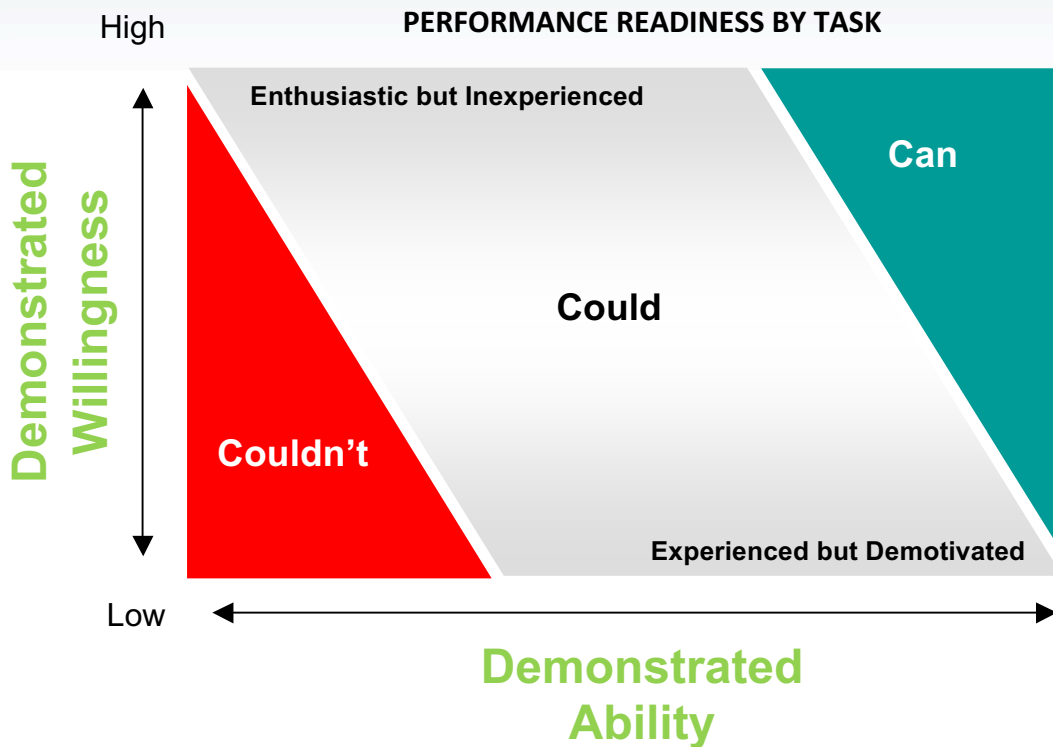
### EVALUATE – Establish Coaching Continuity



- 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.

## Coaching

### Performance Readiness



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

	CAN'T/WON'T	COULD	CAN
CAN'T	<p><b>Needs to Learn the Basics</b></p> <ul style="list-style-type: none"> <li>Lacks skill and experience, does not see clearly how to move forward or know what resources to draw upon.</li> <li>May be unaware of performance issue.</li> <li>Lacks confidence in own ability to build provider and internal relationships and achieve results.</li> </ul>	<p><b>Needs to Expand Skills (Enthusiastic but Needs Experience)</b></p> <ul style="list-style-type: none"> <li>Asks questions and seeks clarity.</li> <li>Enthusiastically takes on more than he/she can handle.</li> <li>Delivers results but may experience setbacks.</li> </ul>	<p><b>Needs to Stretch</b></p> <ul style="list-style-type: none"> <li>Makes optimal decisions about how to get results.</li> <li>Develops fresh approaches to meeting customer needs.</li> <li>Proactively alerts you to problems and opportunities.</li> <li>Assists in the development of other Provider Representatives.</li> </ul>
WON'T	<p><b>Needs to Turn Around</b></p> <ul style="list-style-type: none"> <li>Demonstrates unacceptable performance (does not meet performance expectations) or marginal performance (barely meeting minimum expectations) on a sustained or intermittent basis.</li> </ul>	<p><b>Needs to Engage (Experienced but Demotivated)</b></p> <ul style="list-style-type: none"> <li>Avoids taking initiative or avoids the Manager.</li> <li>Demonstrates ability but shows evidence of poor motivation or attitude.</li> </ul>	



### 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.

**DIRECTIVE**  
High Guidance

**PARTICIPATIVE**  
Balanced Guidance and Support

**ENCOURAGING**  
High Support

# Manager's Coaching Style: What You Do

## DIRECTIVE High Guidance

Be Directive With Can't	Be Directive With Won't
<ul style="list-style-type: none"> <li>• Provide specific direction about what and how.</li> <li>• Describe what they most need to learn.</li> <li>• Team the Provider Representative with an experienced peer and/or meet regularly to provide feedback.</li> <li>• Provide opportunities to practice and any training needed to build skills.</li> <li>• Offer encouragement and positive feedback and express confidence, when appropriate.</li> <li>• Check in regularly with Provider Representative.</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly communicate need for improved performance against standards.</li> <li>• Describe consequences of failure to improve.</li> <li>• Closely supervise performance improvement efforts.</li> <li>• Contact HR and Next Level Manager.</li> <li>• Provide a written action plan describing specific performance expectations that must be met within a specified time frame.</li> </ul>

## PARTICIPATIVE Balanced Guidance and Support

Be Participative With Could (Needs to Expand Skills)	Be Participative With Could (Needs to Engage)
<ul style="list-style-type: none"> <li>• Ask employee how he/she would approach the situation; support employee's ideas when possible.</li> <li>• Modify ideas and suggest other approaches or resources, as appropriate.</li> <li>• Set realistic limits for employee's efforts at new tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss and clarify mutual expectations with regard to initiative or "checking in."</li> <li>• Discuss how behavior impacts team/individual performance and provide examples.</li> <li>• Determine if employee needs more direction or if they can improve behavior on their own.</li> <li>• Explore root causes and agree to needed changes.</li> </ul>

## ENCOURAGING High Support

Be Encouraging With Can
<ul style="list-style-type: none"> <li>• Outline and clarify desired outcomes.</li> <li>• Let employee decide on what and how.</li> <li>• If asked, share ideas or best practices.</li> <li>• Run interference and eliminate barriers.</li> <li>• Continue to offer feedback.</li> </ul>

## 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.



- Establish purpose and tone
  - Ask for their view
- 



- Focus on one to three tasks to discuss
- 



- Offer feedback
  - Describe observable behaviors, benefits
- 



- Explore ideas for improvement, development
- 



- Commit to action
-

# The Coach O.F.T.E.N. Guide

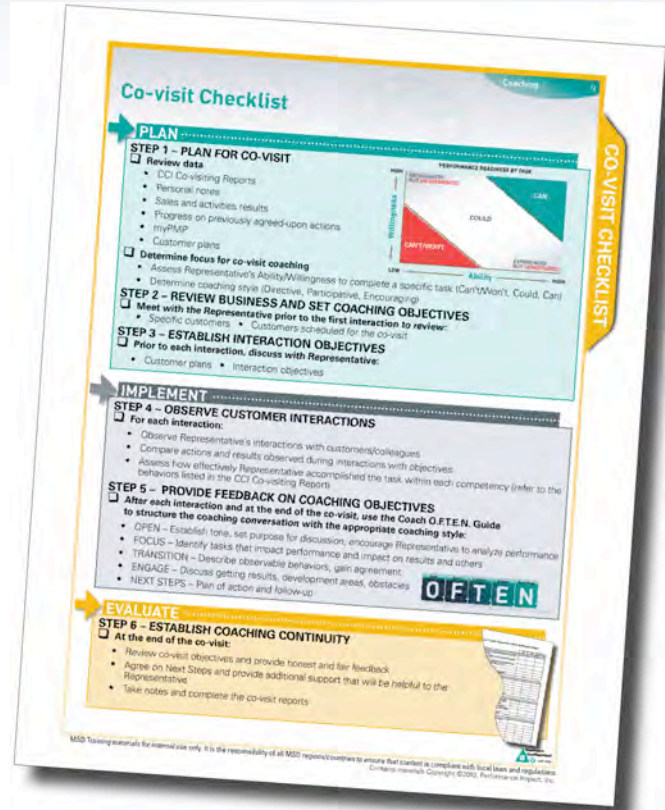
<b>DIRECTIVE</b> High Guidance	<b>PARTICIPATIVE</b> Balanced Guidance and Support	<b>ENCOURAGING</b> High Support
<b>OPEN</b>		
Offer the Provider Representative the opportunity to share his/her view of task performance.  Review performance against standards (PBCC standards, PSI Quality Standards).  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.	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 appreciative tone and acknowledge the Provider Representative's positive impact on results and relationships.
<b>FOCUS</b>		
Identify one or two tasks that most impact performance and the <b>negative impact</b> on results and others as the Focus of the coaching conversation.	Identify one or two tasks that most impact performance and the <b>positive or negative impact</b> on results and others as the Focus of the coaching conversation.	Identify one or two tasks that most impact performance and the <b>positive impact</b> on results and others as the Focus of the coaching conversation.
<b>TRANSITION</b>		
Describe observable behaviors and gain agreement <b>that information/training is needed or that a problem exists.</b>	Describe observable behaviors and gain agreement <b>on how to take performance to the next level.</b>	Describe observable behaviors and <b>note any current or future challenges that could be a barrier to sustaining high performance.</b>
<b>ENGAGE</b>		
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.
<b>NEXT STEPS</b>		
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.



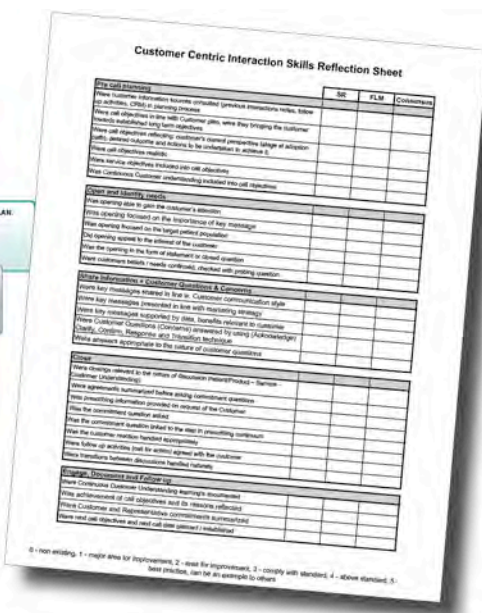
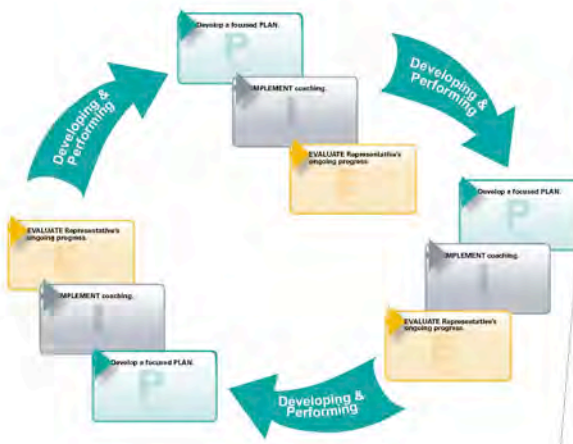
# Evaluate Ongoing Progress

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.



# Co-visit Checklist

## PLAN

### 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

## IMPLEMENT

### 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

## EVALUATE

### 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