PROGRAM OVERVIEW

About the Training Program

This training program is intended for any manager, trainer, or supervisor who is responsible for initially teaching skills to a group of employees and then providing ongoing coaching and support. The focus of this workshop is on “soft” skills, such as interviewing, customer service, selling, making presentations, supervising, telephone reception, and patient care. Much of it can also be applied to the coaching of “hard” skills, such as computer applications.

Coaching skill development encompasses several competencies: how to teach skills, conduct skill practice, coach on-the-job performance, and adjust to the learning style of trainees. Each of these competencies will be addressed in this program. This training program works best with participants who share similar roles and teach similar skills. With some modifications, however, it can serve a more heterogeneous group.

Training Objectives

Participants will have the following opportunities:

- To learn and practice an active-learning approach to skill teaching;
- To design and conduct role-play practice sessions;
- To improve their ability to observe trainee performance;
- To promote the trainee’s use of problem-solving skills;
- To develop confidence in giving developmental performance feedback;
- To work on setting performance goals; and
- To know how to recognize and adjust to the learning style of trainees.

Designed by Mel Silberman.
# PROGRAM OUTLINE

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I. Opening Activities

A. Introduction (Presentation)

1. Explain to participants that workers at every level in an organization are learning new skills as practices such as cross-training increase and conditions such as new policies and procedures abound.

2. Ask participants to share examples from their organizations.

3. Indicate that the job of effectively teaching new skills and providing ongoing performance support has never been more valued. In this training program, participants will have the opportunity to do the following:

   • Learn and practice an active-learning approach to skill teaching,
   • Design and conduct role-play practice sessions,
   • Improve their ability to observe trainee performance,
   • Promote the trainee’s use of problem-solving skills,
   • Develop confidence in giving developmental performance feedback,
   • Work on setting performance goals, and
   • Know how to recognize and adjust to the learning style of trainees.

4. Obtain feedback and reactions to these objectives.

B. Trading Places (Icebreaker; Materials: Post-it® Notes)

1. Give participants one or more Post-it® Notes, depending on whether you believe the activity will work better by limiting the participants to one contribution or by allowing them several.

2. Ask participants to write on each note a skill that they teach to others in their work as managers, trainers, or supervisors.

3. Ask participants to stick the note(s) on their clothing and to circulate around the room reading one another’s notes. Encourage them to ask questions of one another to clarify what is written on the note(s).

4. Next, have participants mingle once again and negotiate trades of Post-it® Notes. Each trade should be based on the participant’s desire to possess the skill for which he or she is trading. All trades must be two-way. That is, both participants must be
willing to trade skills. Encourage participants to make as many trades as they would like.

5. Reconvene the entire group and ask participants to share what trades they made and why. Then have participants post all the notes in a public display (on a blackboard, flip chart, etc.) and note the variety of skills that can be used for practice in today’s program.

■ C. Lightening the Learning Climate (Creative Exercise)

1. Explain to participants that you want to do another fun opening exercise with them before getting serious about the subject matter.

2. Divide the participants into subgroups of three to five members each. Ask each subgroup to develop a list of the worst traits that a trainer/coach of new skills could have.

3. Invite each subgroup to present its list in turn. Applaud the results.

4. Note the common assumptions in the group about ineffective skill coaching.

■ II. Demonstrating Skills

■ A. Traditional Skill Teaching vs. Active Skill Teaching (Study Group; Materials: Form A)

1. Point out that skills are often taught by a process of explain and show. The trainer usually explains the skill and then demonstrates it. Afterward, the trainees attempt to do the skill by themselves. If they are successful, the trainer praises them. If they are not, the trainer corrects the performance and the trainees try again.

2. Mention that the “active” training of skills uses a different approach. Distribute Form A and ask participants to read it.

3. Form study groups of three to four participants each. Ask each group to spend fifteen minutes to do the following:

   • **Clarify** the content of the form.
   • **Discuss** examples of skills that could be taught actively.
   • **Identify** points that are confusing or unclear.
   • **Assess** how well participants understand the material.

If desired, appoint a member of each group to act as a discussion facilitator, another as a timekeeper, and another as a recorder/presenter.
Obtain questions, comments, and assessments from the study groups.

4. Demonstrate the difference between traditional skill teaching and active skill teaching. Select a skill relevant to your participants. For example, if you have participants who train others in selling skills, you might choose:

- Opening a sales call
- Identifying the customer’s needs
- Linking a benefit to a feature
- Closing a sales call

Teach the skill in a traditional manner and then teach it using active-training principles.

5. Ask participants to list the benefits of the active-training approach. Reinforce their list with the following benefits (if unmentioned):

- An overview gives participants an overall picture of the skill.
- Demonstrating without explanation encourages participants to pay close attention and to actively seek understanding.
- Motivation increases as participants attempt to test themselves.

B. Practicing Active Skill Teaching (Skill Practice)

1. Divide the participants into trios.

2. Ask the members of each trio to assume one of three roles: demonstrator, trainee, or observer. All three roles should be represented in each trio.

3. Request that the demonstrator teach a skill using an active-training approach.

4. When the task is completed, ask the observer to give the demonstrator feedback, using the following criteria:

- Was an overview of the skill given?
- Was the skill demonstrated without explanation?
- Was the trainee asked to explain the skill demonstrated?
- Was the trainee asked to try the skill?
- Was the trainee given the opportunity to test himself or herself?
- Were questions encouraged?
5. Rotate roles within the trio so that each member has experience in all three roles—demonstrator, trainee, and observer.

### III. Conducting Skill Practice

#### A. Why Role Playing Is Sometimes Unpopular (Group Discussion)

1. Mention that after specific subskills are learned, it is important for trainees to practice them together in order to build confidence in conducting an entire skill. This is best accomplished through the use of role play.

2. Ask participants to suggest reasons why trainees may not like to role play.

3. Compare their responses to the following list:

   - Role playing might make participants anxious and uncomfortable
   - Role playing might feel artificial or contrived to participants
   - Participants feel judged and singled-out
   - Group feedback to role playing is negative and unsupportive
   - Role playing deteriorates into play; participants are not serious
   - Those not participating are passive and bored

4. Point out that when role playing produces negative feelings, the purpose of role playing—to enable trainees to experiment with new behaviors in a safe setting and receive constructive feedback—is defeated. People are not apt to be open to learning when they feel incompetent, defensive, artificial, silly, or bored.

5. Ask participants to suggest ways to introduce and facilitate role playing so that its purpose is achieved. To obtain this input, use a participatory technique such as call-on-the-next-speaker, a panel, a fishbowl, a whip, and so forth.

#### B. Role-Play Design Options (Jigsaw; Materials: Form B)

1. Explain that role playing is often conducted in only one way: a participant is called on to perform in front of the entire training group, who then critique the participant’s performance. Indicate that there are a number of other choices when designing role-playing practice.

2. Ask the participants to form trios. Distribute Form B to the participants and assign one member of each trio to read each section of Form B (“Scripting,” “Formatting,” and “Processing”).
3. Ask each trio member to summarize the information assigned to him or her and to share that summary with the other two members of the trio.

4. Reconvene the whole group and ask participants whether they have any questions about the material they have read. If there are no questions, pose these questions to participants:

- **Which role-playing options would make participants less anxious than others?**
  (possible answers: breaking into small groups, reading pre-prepared scripts, rotating roles quickly so that participants do not have to perform for a long period of time)

- **How can you make a role play as realistic as possible?**
  (answer: set up a role-play scene that is based on an actual experience of one of the participants)

- **How can you design a role play that combines practice and immediate feedback?**
  (answer: by adding one or more observers to a role-playing group)

### C. Role-Play Design Practice (Problem-Solving Activity)

1. Divide participants into pairs.

2. Give the following assignment:

   Design two different ways to script, format, and process any skill practice session.

3. Reconvene the whole group. Ask a spokesperson from each pair to present one of the role-playing designs developed by the pair. As each representative presents, request that he or she select a design that is different from those already presented.

4. As each design is presented, obtain group feedback concerning the advantages and disadvantages of the design.

For example, a simultaneous format (in which several role plays are conducted at once) allows for more participation and different perspectives. No one is singled out and this format is less threatening than stage front role plays. However, single-group role plays produce more feedback for the actors and are easier for the trainer to monitor and control.

A second example would be the use of scripts. Scripted role plays are easier to perform and allow the trainer to focus the trainees on the desired behaviors. However, they do not create the spontaneous involvement and creative responses that come with unscripted role plays.
D. Role-Play Facilitation Practice (Skill Practice)

1. Invite each subgroup to take a turn actually conducting the design it previously reported.

2. As each subgroup begins, have one person volunteer to be the “facilitator.” Ask him or her to begin the role play and facilitate it for approximately five minutes. Stop the role play and ask the “facilitator” to assess how it went. Use questions such as the following: “What do you like about how you have facilitated this role play so far? What would you like to improve if you were to do it over again?” Then obtain feedback from the observers. Conclude with your own suggestions.

3. Request that someone else from within the trio replace the first volunteer and now become the “facilitator.” Again, continue for approximately five minutes and stop for self-assessment and group feedback.

4. Continue this process until all groups have conducted their role-playing design and as many participants as possible have assumed the role of facilitator.

E. Facilitating Video Feedback (Fishbowl; Materials: Form C)

1. Point out that as trainees become more comfortable and more skilled, it may be a good idea to videotape their performances. Video feedback is especially useful because trainees can see for themselves how they perform the skill as well as hear what they say. The video feedback also allows a closer look at the trainee’s performance.

2. Distribute Form C. Ask participants to read it and to answer these questions: Do you agree with the advice? How would you implement the suggestions?

3. Form a fishbowl or “group-on-group” discussion format. Invite half of the participants to take seats in the inner discussion circle. Join that group and facilitate a discussion in which the views and ideas of the participants are explored. After approximately ten minutes, invite the other half of the group to replace the participants seated in the inner circle. Invite these discussion participants to react to the views and ideas expressed by the first group and to add their own.

Note: If you do not have the space to create a fishbowl seating arrangement, have the participants count off by 1’s and 2’s. Keep everyone seated where they are. Ask the 1’s to be the first discussion participants while the 2’s listen. Then reverse roles.

IV. Providing Performance Coaching

A. Identifying Feedback Flaws (Role Play; Materials: Form D)

1. Explain to participants that as they work on the job with trainees on a one-to-one basis, their role switches from that of trainer to that of coach. During this phase, they
have the opportunity to observe and discuss trainee performance and ongoing development.

2. Ask for two participant volunteers to come to the front of the room and read the scripted role play, “What’s Wrong with This Picture?” (Form D).

3. Ask the remaining participants to observe carefully and take notes, identifying good and bad points of the feedback session just enacted.

4. After the role play, ask participants to work in pairs to develop two lists: (1) what the trainer did well and (2) what he or she could have done better as a coach.

5. Reconvene the entire group and discuss the lists, soliciting input from the pairs using a “call-on-the-next-speaker” format. Participants should note the following good points and bad points illustrated in the script:

**Good Points**
- Started with several positive comments
- Indicated genuine desire to help

**Bad Points**
- Did not get trainee’s self-assessment and input
- Asked close-ended questions
- Addressed too many behaviors at once
- Gave more “don’ts” than “do’s”
- Did not establish an action plan
- Did not set a follow-up meeting

6. Briefly discuss the differences between developmental and evaluative feedback: The purpose of developmental feedback is to get the person to the next level of his or her performance through ongoing coaching. Evaluative feedback, on the other hand, is given to assess or evaluate a person’s performance and is given periodically in formal performance-appraisal contexts. Evaluative feedback focuses on the past, whereas developmental feedback focuses on the future. Ask participants to explain the differences and give examples. Emphasize that this session focuses on developmental feedback.

### B. Observing Performance (Observation)

1. Explain to participants that if they are to be successful as supportive performance coaches, it is important, as a first step, to fine-tune their observation skills.
Point out that when they observe someone for even as little as five minutes, there are many things going on, verbally as well as nonverbally, both positive and negative. It is not only impossible, but also undesirable, to try to note everything at once. As they are observing, they should be focusing on three primary areas that will serve as the basis for the feedback discussion.

- **Specific behaviors**: what the trainee actually says or does (rather than general observations)
- **Positive aspects of the observation**: those behaviors that should continue
- **Areas to be improved**: those behaviors/skills that have the highest priority

2. If possible, bring a video of a person performing a skill of interest to your participants. Or role play a trainee who is relatively a novice in a skill area. Ask the remaining participants to place themselves in the role of the coach who is observing the trainee. Specifically, ask them to observe the following:

- Specific skill behaviors
- Positive aspects of the observation
- Areas to be improved

3. After the video or role play is completed, divide participants into subgroups and ask them to develop a list for each of the criteria listed above.

4. Reconvene the entire group and ask representatives from each of the subgroups to share their lists. Or create new small groups that contain a mixture of participants from the previous groups and ask participants to share their lists with the new group members.

■ **C. Self-Assessment (Lecturette)**

1. Explain that for coaching to be effective, it is important for the trainee to accept an active role in the process. One way to promote the collaborative aspect of coaching is to begin the coaching session by asking the trainee to assess how well he or she thought the observation went and to identify his or her areas for improvement. When the trainee identifies his or her own areas for improvement, he or she is more likely to commit to change behavior.

   There is also diagnostic value to asking the trainee to assess himself or herself first. The coach learns what insights the trainee has about his or her own performance. When the trainee recognizes areas that need improvement, the coach can then build on what the trainee says rather than bringing up his or her own agenda.
2. Ask the group members for specific suggestions as to what they could say to encourage a trainee to assess his or her performance. Suggestions might include the following:

“What do you think you did well?”

“How did you feel about your performance?”

“What do you think could have gone better?”

“What might you do differently the next time?”

“If you had to work on one thing, what would it be?”

3. Emphasize that this self-assessment is an important beginning and sets the stage for the feedback that the coach delivers.

■ D. Giving Feedback (Dyadic Discussion; Materials: Form E)

1. Explain that the coach should build on and incorporate the trainee self-assessment into the coaching/feedback session. The coach should explain to the trainee that the coach would like to share some observations he or she has and then get the trainee’s reactions to those observations. Mention, however, that there are some things coaches should keep in mind when giving feedback.

2. Distribute Form E and ask participants to work in pairs to come up with specific examples for each of the listed feedback guidelines. Then reconvene the total group to discuss these examples.

3. Divide participants into subgroups of three and ask each trio to assign the roles of trainee, coach, and observer to its members. Ask participants to imagine that the person playing the role of the trainee is the same trainee portrayed on video or in the role play in activity B above. Ask each person playing the coach to give feedback to the trainee. Ask the person playing the observer to take notes on specific feedback behaviors demonstrated by the coach.

4. After the trio role plays are finished, hold a large-group discussion. Ask those who were coaches to assess their own performances, citing what they think they did well and what they could have done better. Then ask the people who played the trainees to give feedback about the coaches’ success in giving feedback. Finally, ask the observers to share their observations concerning what went well and what could have been done better.

■ E. Problem Solving (Skill Practice; Materials: Form F)

1. Explain that sometimes during feedback sessions a trainee will bring up problems and want the coach to provide solutions. This is often a direct outcome of the self-
assessment process. It is more effective, however, if the coach helps the trainee to solve his or her own problem rather than telling him or her what to do. Point out that this approach takes time and requires the mastery of certain communication skills. However, the extra time and skill required can be extremely beneficial to the trainee.

2. Mention that one of the most important communication skills is questioning, particularly the use of open-ended questions that start with who, what, where, when, why, and how. Also explain that close-ended questions, that is, questions that can be answered with a simple “yes” or “no,” are very limiting. Open-ended questions, on the other hand, encourage the trainee to communicate openly and promote two-way collaborative communication.

3. Explain that another important communication skill is active listening. Distribute Form F and review it briefly as a group.

4. Indicate that questioning and listening skills are key to helping a trainee problem solve. Further explain that the problem-solving model consists of three parts: (1) diagnosis, (2) generating alternative action steps, and (3) identifying consequences for each action step.

5. Ask participants to form pairs and to take a few minutes to develop one or two questions that a coach might ask to initiate each part of the model. Reconvene the entire group and discuss the responses. The discussion may include the following examples:

**Diagnosis**

“Why do you think this problem occurs?”

“What barriers do you think you need to overcome?”

**Alternative Action Steps**

“What can you do differently next time?”

“How could you have. . .?”

**Consequences of Action Steps**

“What do you think might happen if you. . .?”

“How do you think that might impact the call?”

“What if you were to. . .?

Reinforce the use of open-ended questions and active-listening techniques as illustrated in the preceding examples.
6. Explain that you are going to give participants an opportunity to practice these problem-solving coaching techniques. Divide participants into trios and explain that each trio will conduct three role plays, rotating the roles of coach, trainee, and observer each round.

7. Ask each trio to select a skill area of interest to them and to define three problem situations that a trainee might raise about that skill area. For example, a person learning how to give business presentations might ask how to handle a situation in which he or she has been told that the time available for the presentation is far less than was expected. Instruct the trio to conduct a role play for each of the three problem situations. Thus, the person taking the role of the trainee will raise a problem situation and the coach will try to involve him or her in thinking through the situation rather than merely giving expert advice. After the role play is conducted, the observer will provide the coach with feedback.

8. After the three role plays have been completed and the feedback shared within the trios, reconvene the entire group and process the activity by discussing the major points learned through the role playing.

■ F. Coaching Follow-Up (Role Play)

1. Explain that successful coaching requires an action plan and follow-up. It is important to state precisely what you want the trainee to do. For example, the coach might say, “I’d like you to practice asking more probing questions in order to...” Point out that it is a good idea to ask the trainee to summarize the meeting by stating what he or she is going to work on in the immediate future. Also mention that the coach should ask what he or she can do to help support the trainee in his or her efforts. The coach and trainee should agree on a follow-up meeting that, in this example, may or may not involve an observation of the trainee.

2. To demonstrate how this might look and sound, ask for two volunteers to do an on-the-spot, spontaneous role play illustrating the closing discussion of a coaching meeting.

■ G. Performance-Support Development Plan (Guided Teaching; Materials: Form G)

1. Explain that the next step is for the participants to develop a set of guidelines to use in their roles as supportive performance coaches.

2. Divide participants into subgroups of three to five members each and ask the subgroup members to draw on the major learning points of the session in developing their guidelines.

3. Reconvene the entire group and distribute Form G. Compare the new lists with the guidelines in Form G.
V. Dealing with Style Differences

A. Go to Your Post (Subgroup Exchange; Materials: Form H)

1. Distribute Form H, which describes the preferences of learners with auditory, visual, and kinesthetic styles.

2. Post three signs in different areas of the room, each one indicating one of the three learning styles.

3. Ask participants to select the style that most accurately describes themselves and then to go to the designated area for that style.

4. Once the subgroups are formed, ask the members to discuss with one another why they perceive themselves as possessing that style.

5. Next, ask subgroup members to discuss what a coach can do to maximize the learning of individuals with their style. Specifically, ask them to make a list of these coaching tactics and then to describe on flip-chart pages how they would like to be taught to drive a stick-shift car.

6. Ask a member from each of the three subgroups to present the subgroup’s list to the rest of the group. Compare the three different approaches and discuss the differences. Also discuss the implications of learning styles for coaching effectiveness.

7. Emphasize that to be an effective coach, one must communicate in the trainee’s style. That is, the coach needs to translate messages and modify his or her behavior to match the trainee’s style.

B. Adjusting to Style Differences (Panel Discussion)

1. Form new subgroups with members from each of the three learning-styles groups.

2. Ask the subgroups to discuss how they would coach three trainees, each with a different learning style—auditory, visual, and kinesthetic.

3. Reconvene the entire group and ask representatives from the subgroups to form a panel and share how they would approach and coach each style. Moderate the panel discussion.

VI. Closing Activities

A. Giving Questions and Getting Answers (Response Cards; Materials: Index Cards)

1. Hand out an index card to each participant.
2. Ask each participant to complete the following sentence:

I still have a question about ________________________________.

3. Create subgroups and have each subgroup select the most pertinent question from the cards of its members.

4. Ask each subgroup to report the question it has selected. Determine whether anyone in the full group can answer the question. If not, you should respond.

■ B. Obstacle Assessment (Writing Task)

1. Explain to participants your hope that they will apply the skills they have learned in this training program. Recognize that the best of intentions to act differently in the future can go by the wayside as easily as New Year’s resolutions. Indicate that this activity is designed to deal with this reality.

2. Ask participants to predict the obstacles they will have to overcome in applying what they have learned. Have them think about the circumstances of their first moment of “faltering”—a moment when they will revert to previous ways of coaching skill development. Encourage participants to visualize the scene in detail.

3. Then ask participants to make a list of obstacles they might face. Suggest that they separate their lists into two categories—“internal” and “external.” Internal obstacles refer to a person’s own attitudes and actions. External obstacles refer to attitudes and actions created by other people and events that interfere with one’s own resolve. Ask participants to brainstorm ways to overcome these internal and external obstacles.

4. Invite participants to share their plans with others in the group.

5. Express confidence that participants will be able to conquer their obstacles. Thank them for their participation in the training program.
COACHING SKILLS
FORM A

Active Skill Training

When you are demonstrating a skill, it is important not to explain too fully what you are doing. By demonstrating a skill without explanation, you encourage participants to be mentally alert to what you are doing. Instead of your explaining what you are doing, you want the participants to observe, figure out what you are doing, and explain it back to you.

Use the following steps when teaching a skill actively:

1. Ask the participants to watch you perform the skill. Just do it, with little or no explanation or commentary about what you are doing. Give them a visual glimpse of the “big picture.” Do not expect retention. At this point, you are merely establishing readiness for learning and providing an overview.

2. Instruct the participants to form pairs. Demonstrate the skill once more slowly, again with little or no explanation or commentary. Ask pair members to discuss with each other what they observed you doing. Obtain a volunteer to explain what you did. If the participants have difficulty, demonstrate the skill again. Acknowledge correct observations. If you are demonstrating a skill to only one person, follow the same procedure but ask that person to explain what you did directly back to you.

3. Ask for questions! Because participants have been actively involved in the process of observing the skill, they will have more questions (and better ones) than if you had taught the skill in a traditional manner.

4. Direct the pair members to practice the skill with each other. Tell them that you want them to “test themselves.” Encourage them to practice until they have proven to themselves that they have mastered the skill.

Even before using the above technique, consider the possibility of asking participants to attempt the skill before you demonstrate it. By doing this, you will immediately involve participants mentally. Then have them watch you demonstrate the skill.

If some participants master the skill sooner than others, recruit them to silently demonstrate the skill to others and to help them practice it.
Role-Play Design Options

Role playing is a staple in any active trainer’s repertoire. It is the best-known way to help participants both to try out new skills and to practice them. You have many choices when designing role-play exercises. One set of choices has to do with the scripting of the drama.

Scripting

Scripting deals with the content of the role play. Here are some different choices:

1. **Improvisation**
   Give participants a general scenario and ask them to fill in the details themselves. No time is given to prepare what happens.

   Example: “Let’s imagine that you are at a restaurant and that your order arrives overcooked. Mary, please assume the role of the customer and request that the order be redone. Frank, why don’t you assume the role of the waiter and give Mary a hard time. Mary, you will try to persuade the waiter to redo the order. I’d like to see you both use all the skills we’ve been practicing so far.”

2. **Prescribed**
   Give participants a well-prepared set of instructions that states the facts about the roles they are portraying and how they are to behave.

   Example: “You are an accountant for an insurance company. You have been with the company since your graduation from college three years ago. You really like the company, feel you are doing well, and are looking forward to a promotion. You like your work except for writing letters, memos, and notes on your accounting reports. You have never admitted it to anyone, but you have always had difficulty with English. Your manager has just called you in. You’re afraid it might be about your writing. You will admit your deficiency only if your manager seems genuinely interested and concerned; otherwise, you will make up excuses.”

3. **Partially Prescribed**
   Give participants background information about the situation and the characters to be portrayed but do not tell them how to handle the situation.

   Example: “You like your work except for writing up reports. You’ve never admitted it to anyone, but you’ve always had difficulty in this area. Your manager has just called you in. You’re afraid it might be about your writing and spelling difficulties. How would you handle the situation?”

4. **Replay Life**
   Participants can portray themselves in an actual situation they have faced.
Example: “I’d like each of you to think about the last time you gave a performance appraisal. Tell your role-playing partner what generally happened and reenact the situation, the first time keeping to the approach you took when you actually gave the appraisal and the second time altering your approach to include the suggestions I have demonstrated.”

5. Prepared Role Play
Ask participants to develop a role-playing vignette of their own.

Example: “I’d like for you and your partner to take the four kinds of sales questions we’ve just discussed and prepare a role play that shows how a trainee can use SPIN questions in a sales call promoting a product I will assign to you. Take about ten minutes to prepare your role plays. When you’re ready, let me know and we will take a look at what you’ve come up with.”

6. Dramatic Reading
Participants can be given a previously prepared script to act out.

Example: “Here is a script of a hiring interview in which the interviewer does an effective job dealing with a nervous applicant. In your pairs, one will be the interviewer and the other will be the applicant. Read your parts aloud to each other. Do it a few times and then try to do it without the script.”

Another set of choices has to do with format.

**Formatting**

Formatting is concerned with how you stage the role play, regardless of the content.

1. Informal
The role play can evolve informally from a group discussion.

Example: A participant says, “I can’t get this employee to listen carefully to directions.” Wanting to understand the situation better, the trainer spontaneously responds, “In order for me to have a clearer picture of what usually transpires between you and the employee, let me pretend to be him and you tell me about some assignment. I’ll respond the way I think a person who doesn’t listen carefully to directions would, but if I’m not acting like he does, let me know. We don’t have to set this up in any formal way. Stay seated where you are and just start off the conversation.”

2. Simultaneous
All participants are formed into pairs for a two-person drama, trios for a three-person drama, etc., and simultaneously undertake their role plays.

Example: “I’d like you to pair up with the person seated next to you and turn your chairs around to face each other. You should move away from the other pairs so that you have
some privacy. One of you needs to volunteer first to be the receptionist and the other the caller. Each of you will then get to practice how to respond to a telephone call.”

3. **Stage Front**

Volunteers or assigned role players can perform in front of the entire group and the rest of the group can serve as observers.

Example: “I need a volunteer who will portray a doctor who prefers to treat acid-reflux problems with dietary changes rather than medication and another volunteer to portray a trainee who is selling one of our new products in this area. Would someone agree to be the doctor? the trainee?”

4. **Rotational**

Actors in the role play can be rotated, usually by interrupting the role play in progress and substituting for one or more of the actors.

Example: “I’d like to set up a role-playing scene in which an irate customer is calling to complain that her claim check has not yet arrived; the claims adjuster needs to remain courteous under great pressure. This time we’ll do something a little differently. At thirty-second intervals, I’ll tap out the role players and their parts will be picked up by the next people in line.”

5. **Different Actors**

More than one actor can be recruited to role play the same situation in its entirety, allowing the group to observe more than one style.

Example: “I need three people who will, one at a time, establish rapport with an applicant at the beginning of a hiring interview. You three will be asked to leave this room and to decide who will do the role play first, second, and third. While you’re gone, we will set up the scene and then ask the first volunteer to come in the room and meet with the applicant. The other two volunteers will stay outside until their turn arrives. This way none of you will have seen any of the others role play the situation before you do it. I realize that volunteering means taking a big risk, but the rest of the group and I would really appreciate the chance to see three different people handling the same situation.”

6. **Repeated**

The role play can be reenacted.

Example: “Now that you’ve had a chance to try out this situation once, I’d like you to try it a second time. This time make any changes you’d like to improve on your performance. Think of it as a ‘dress rehearsal’ before going out to the real world and actually doing it. Good luck!”

A final set of choices has to do with processing the role play.

**Processing**

Processing refers to the working through of the reactions to the role-play performance.
1. **Self-Assessment**
The role players themselves can discuss their reactions to the experience.

Example: “Let’s take a few minutes first to hear your reactions to the role play. When did you feel effective? What felt uncomfortable? What would you like to do better the next time?”

2. **Designated**
One or more participants can be designated feedback-observers. This is possible in both single-group and multi-group role plays.

Example: “In your trio, each of you will take a turn as a feedback-observer for the other two. When their role play is finished, share with the actors the behaviors you saw that reinforced the benefits of the product.”

3. **Open Audience Reaction**
Invite the audience to give reactions and feedback to an “on-stage” role play.

Example: “Now that we’ve seen how Pat handled the business presentation, who would like to give a reaction? Please state the positive points first and then I’ll ask you for suggestions for how she could do things differently.”

4. **Subgroup Feedback**
Assign a small group from the audience to meet with each one of the role players and discuss what they saw happening.

Example: “Since we had three different actors in this role play, I will ask the audience to count off by threes. The 1’s will meet with actor 1 and discuss his reactions to the role play and the reactions you had to his performance. The 2’s will meet with actor 2 and do the same. The 3’s will meet with actor 3.”

5. **Trainer Feedback**
The trainer can give his or her reactions to the role play for everyone to hear.

Example: “This was terrific. I’m really impressed by the number of techniques weaved into your performance. I especially liked the way you handled his resistance. Your empathy really disarmed him. You might consider, for fine-tuning purposes, pausing a little more to emphasize what you’re saying. Is this feedback helpful?”

6. **Comparison to Standard**
The role players and observers can compare the performance to an “ideal” performance that meets all the standards set by an expert.

Example: “Let’s take a look at a textbook example of this performance appraisal. Look over this script and find things in it you wish you had done. Also identify what you don’t like. After you have read the script, find a partner and discuss your responses. We’ll reconvene in fifteen minutes.”
Facilitating Video Feedback

Prior to Taping
1. Give trainees adequate time to prepare for taping so that they perform well enough to have a positive learning experience.
2. Lighten the mood so that the performance is as natural and relaxed as possible.
3. Consider initially leaving the room in which the videotaping session will take place to allow trainees to experiment and tape each other briefly. Do this to help them become less camera conscious.

During the Taping
4. Don’t make teaching points when participants are recording. Hold off until later.
5. Do make notes of what the trainee is doing well and what needs to be improved. Start to think about what parts of the recording you may want to review carefully with the trainee. (You may want to keep a running time notation system so that you can easily locate critical parts later on.)

After the Taping
6. Give trainees uninterrupted time to make their own judgments of their performances first.
7. Consider creating peer support groups whose members watch one another’s tapes and give feedback.
8. Develop a written checklist of specific behaviors trainees can look for when analyzing their tapes.
9. Review parts of the tape you have selected with each trainee. Use effective feedback techniques, such as being descriptive and specific, focusing on do’s rather than don’ts, and obtaining the trainee’s reactions to your feedback. Invite the trainee to comment on his or her performance and to problem solve as much as possible prior to your giving any advice.
“What’s Wrong with This Picture?”

Scenario: Roberta (or Robert), a pharmaceutical sales trainer, has accompanied a new trainee-representative, Sam (or Samantha), on his (or her) sales calls. The two called on four physicians this morning and five physicians this afternoon. It’s near the end of the day, and the trainer suggests that they stop for coffee and a debriefing session before they call it a day.

Instructions: As the two volunteers read the following role play, please observe carefully and take note of (1) what the trainer does well in providing feedback and (2) in what ways he or she could improve.

R: It’s been a pretty exhausting afternoon, hasn’t it?
S: Boy, I’ll say! Some of these doctors can be really tough to sell.
R: Well, that’s what I want to talk to you about. I thought this would be a good opportunity to give you some feedback on what I observed and also give you some suggestions to help your calls go more smoothly. After all, both your goal and mine is to help you make more sales. Right?
S: Absolutely. Okay, let me have it.
R: Let me start by saying that I think one of your biggest assets is that you are very warm and friendly. That really helps in establishing rapport with the customer. You have a great personality, and you do a great job of creating rapport with the doctors.
S: That’s good to know. I’ve been told that I have the gift of gab and can sell anything to anybody.
R: You certainly have the talent. All we need to do now is to fine-tune your selling skills. One of the things you have going for you is that you seem to know the products well. It’s obvious that you’re well versed on the features and benefits of each product. You do a good job of getting the main points across in a very limited amount of time. Do you agree?
S: Absolutely. I’m really confident that I know the products.
R: Since product knowledge is not a problem, we need to take a look at what is getting in the way of a really successful sales call. The biggest thing I notice is that in your eagerness and enthusiasm, you aren’t taking enough time to plan your sales call. As a result, you come across as disorganized and unprepared. That’s one thing. The second problem I see is that you seem to be a little too eager to close the sale based on one or two of the physician’s needs instead of taking the time to identify and prioritize the physician’s major needs. Do you know what I mean?
S: I’m not sure I do.
R: For one thing, you don’t ask enough open-ended questions to uncover what the physician’s most important needs really are. Because you know the products so well, you seem to focus on just telling the doctor about the products. I also think that you need to do a better job of really listening to what the doctor is telling you. I don’t think you’re picking up on the nonverbal cues. What I would recommend for your next set of calls is to do a better job of pre-planning, including the preparation of some open probes. During the call, concentrate on asking open-ended questions and really listening to the doctor’s responses; that includes body language as well. Other than those few things, I think you’re doing a good job. So, do you think you can work on those things I just mentioned?
S: Well...okay.
R: Good. I’m sure you’ll see a big difference the next time out.
COACHING SKILLS
FORM E

Giving Feedback

Useful feedback is . . .

✔ Descriptive rather than evaluative.

✔ Detailed and specific.

✔ Constructive (it informs and enlightens).

✔ Directed toward behavior that can be changed.

✔ Well-timed.

✔ Checked to ensure clear communication.
Active Listening

PARAPHRASE the message.
  • As I understand it, what you’re saying is. . .
  • What I hear you saying is. . .

Reflect underlying FEELINGS.
  • You sound concerned about this situation. . .
  • I suppose that must make you feel. . .
  • I can imagine that you feel. . .
  • I know it’s tough to sell when someone is watching. . .

INVITE further contribution.
  • Tell me more about. . .
  • I would like to hear your thoughts about. . .

Attend to NONVERBAL signals.
  • If possible, sit side by side
  • Be aware of defensive posture, e.g., folded arms
  • Maintain eye contact

CLARIFY and PROBE by asking open-ended questions.
  • What prompted you to. . .?
  • How can I help you to. . .?
  • Where do you think we need to focus. . .?
  • When would be the best time to. . .?
  • Why do you think he/she responded. . .?
COACHING SKILLS
FORM G

Performance-Support Development Plan

✔ Conduct pre-session meeting to determine goals for performance observation.

✔ Observe performance; focus on specific behaviors.

✔ Determine priorities for coaching.

✔ Meet and give feedback, both solicited and unsolicited.

✔ Follow guidelines for giving feedback.

  • Use “I” messages.

  • Ask for trainee’s own assessment first.

  • Give opinions, solicit reactions.

✔ Establish an action plan and set a time for the next meeting.
## COACHING SKILLS
### FORM H

### Learning-Style Profiles

What each modality likes:

<table>
<thead>
<tr>
<th>Modality</th>
<th>Visual</th>
<th>Auditory</th>
<th>Kinesthetic</th>
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<tbody>
<tr>
<td></td>
<td>Overheads</td>
<td>Demonstrations</td>
<td>Question time</td>
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<td></td>
<td>Pictures</td>
<td>Broad overviews</td>
<td>Hands-on activities</td>
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<td>Analogies</td>
<td>To see your enthusiasm</td>
<td>Pushing buttons</td>
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<td></td>
<td>Metaphors</td>
<td>To see materials</td>
<td>To touch things</td>
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<td></td>
<td>Stories and examples</td>
<td>Videotapes</td>
<td>To do activities in groups</td>
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<td>that create a picture</td>
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<td>or pairs</td>
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<td>Auditory</td>
<td>Varied and well-modulated</td>
<td>Statistics and facts</td>
<td>Objection time</td>
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<td>voice</td>
<td>Clear, loud voice</td>
<td>Small quiz done in pairs</td>
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<tr>
<td></td>
<td>Detailed descriptions</td>
<td>Audiotapes</td>
<td>To feel your enthusiasm</td>
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<td>Calm and organized talk</td>
<td>Voice with emotional</td>
<td>To take stretch breaks</td>
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<td></td>
<td>To hear your enthusiasm</td>
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<td>To do things while someone is</td>
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<td>To talk out loud so they</td>
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<td>can process what you say</td>
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*The Best of Active Training*