

50 Top Tools for Coaching

FIFTH EDITION

50 Top Tools for Coaching

A complete toolkit for developing
and empowering people

Ro Gorell and Gillian Jones



Publisher's note

Every possible effort has been made to ensure that the information contained in this book is accurate at the time of going to press, and the publishers and authors cannot accept responsibility for any errors or omissions, however caused. No responsibility for loss or damage occasioned to any person acting, or refraining from action, as a result of the material in this publication can be accepted by the editor, the publisher or the author.

First published in Great Britain and the United States in 2021 by Kogan Page Limited

Apart from any fair dealing for the purposes of research or private study, or criticism or review, as permitted under the Copyright, Designs and Patents Act 1988, this publication may only be reproduced, stored or transmitted, in any form or by any means, with the prior permission in writing of the publishers, or in the case of reprographic reproduction in accordance with the terms and licences issued by the CLA. Enquiries concerning reproduction outside these terms should be sent to the publishers at the undermentioned addresses:

2nd Floor, 45 Gee Street
London
EC1V 3RS
United Kingdom

122 W 27th St, 10th Floor
New York, NY 10001
USA

4737/23 Ansari Road
Daryaganj
New Delhi 110002
India

www.koganpage.com

Kogan Page books are printed on paper from sustainable forests.

© Ro Gorell and Gillian Jones 2021

The right of Ro Gorell and Gillian Jones to be identified as the author of this work has been asserted by them in accordance with the Copyright, Designs and Patents Act 1988.

ISBNs

Hardback 978 1 78966 657 1
Paperback 978 1 78966 655 7
Ebook 978 1 78966 656 4

British Library Cataloguing-in-Publication Data

A CIP record for this book is available from the British Library.

Library of Congress Cataloging-in-Publication Data

[to follow]

Typeset by Integra Software Services, Pondicherry
Print production managed by Jellyfish
Printed and bound by CPI Group (UK) Ltd, Croydon CR0 4YY

*This book is dedicated to Lawrence and Elly,
for being my reason to live every day!*

Gillian

*I would like to dedicate this book to my dad,
who always used to encourage me to 'go for it!'
and to my husband Ryszard for being there always.*

Ro

CONTENTS

List of Figures xi
List of Tables xiii
Foreword xv
Preface xvii
Acknowledgements xxvii

Introduction 1

01 Setting up the coaching relationship – The tools to create clear expectations and outcomes 9

The coaching process 9
Coaching assessment form 11
Coaching brief and contracting form 13
Coaching self-assessment questionnaire 18
Checklist for establishing contract rules 21
Action plan 25
Coaching evaluation 28

02 Foundation tools – Key tools for managing coaching relationships 33

Listening model 33
Questioning skills and techniques 37
Feedback techniques and examples 42
The ORACLE model 48
Coffee-break coaching 55
Self-coaching 58

03 Goal setting – Tools for gaining clarity on desired outcomes 61

Creating powerful intentions 61
Goal setting 66
Breaking down previous goals 70
Spatial action planning 71

Goal visualization 74
Goal visualization script 76

04 Problem resolution – Tools for exploring solutions and creating positive options 79

Logical levels 79
Positive problem solving (reframing) 83
Problem mapping 86

05 Values and beliefs – Tools for discovering what motivates behaviours 89

Internal conflict negotiation 89
Helping individuals reduce stress 92
Changing negative thought patterns 96
Determining values 99
Prioritizing values 103
Belief assessment 107

06 Confidence strategies – Tools to create confidence and develop personal performance 111

Reprogramming negative language 111
Personal centre of excellence 114

07 Working effectively with others – Tools for analysing and achieving enhanced relationships 117

Behavioural conflict resolution 117
Analysing and resolving conflict 121
360-degree perspective 124

08 Personal impact and influence – Tools for increasing presence and impact 127

Communication skills audit and skills inventory 127
360-degree feedback 134

09 Enhancing leadership style – Tools for developing your strategy and increasing team performance 145

Team climate inventory 145
Improving the delegation process 149

- Planning to delegate 152
- Prioritizing: paired comparison 158
- Prioritizing: importance–urgency grid 162

10 Planning for the future – Tools for defining where and what you want to be 165

- Life events 165
- The discovery model 169
- Ideal work designer 173
- Managing my career 177

11 Developing women – Tools for coaching women 181

- Identifying super powers through strengths-based portraits 181
- Reflected strengths portrait exercise 183
- Improving confidence by changing beliefs: Internal dialogue and managing the ‘voices’ 188
- Questions to change limiting beliefs 189
- Part 2 190
- Confidence building: Defining the inner team 191
- Emotional intelligence through modelling 195
- Managing upwards 198

12 Coaching during change – Tools for co-creating organizational change 201

- Creating a group coaching environment 201
- Creating tools for group coaching 205
- Lean change canvas 210
- Mapping different perspectives 214
- Hot seat coaching 218

13 Ten extra tools from our coaches 223

- Goal setting – ensuring goals are aligned 223
- Targeting what’s important 227
- Guiding others through the change journey 230
- SLOBA model for building credibility 233
- The alignment process 237
- Accountability review 241
- Breaking the gridlock 246

Building resilience 249
Building and using a supportive network 254
Establishing a real purpose, meaning and value for client
progress 258

14 A manager's guide to coaching 261

Coaching to improve performance 261
Coaching to retain talent 265
Coaching people who are in conflict (individuals, groups or whole
team) 271
Coaching upwards: How to manage your manager! 274
Coaching for resistance to change: Dealing with negativity 277

15 Building a coaching practice 279

Your value proposition 279
Creating coaching packages 282
Pricing your coaching services 289
Managing your business process 297
Systems for delivering your coaching services 301
Coach yourself first: A coach's guide to self-reflection *by Mark
Bisson* 307
Tools for supervision *by Mark Bisson* 312

Index 317

LIST OF FIGURES

- FIGURE 2.1** Coaching process questions 38
- FIGURE 2.2** ORACLE model 49
- FIGURE 2.3** Coffee-break coaching 57
- FIGURE 2.4** Self-coaching 60
- FIGURE 3.1** Timeline action planning 73
- FIGURE 4.1** Problem mapping model 88
- FIGURE 11.1** Emotional intelligence 196
- FIGURE 12.1** Lean Change coaching manifesto 204
- FIGURE 12.2** Example tool categories 206
- FIGURE 12.3** Example tool categories 207
- FIGURE 12.4** Limit and limitations 209
- FIGURE 12.5** Strategic Change Canvas 213
- FIGURE 12.6** Example Perspective Map 217
- FIGURE 13.1** The targeting dartboard 228
- FIGURE 13.2** The change journey 232
- FIGURE 13.3** The SLOBA Model of Credibility 236
- FIGURE 13.4** Goals and action review 245
- FIGURE 13.5** Purpose into action 260
- FIGURE 15.1** Client journey 286
- FIGURE 15.2** Thoughts, feelings, emotions 287
- FIGURE 15.3** Sample coaching package 288
- FIGURE 15.4** Coaching package pricing worksheet 294
- FIGURE 15.5** Engaging clients 299

LIST OF TABLES

TABLE 1.1	Coaching process 10
TABLE 1.2	Coaching assessment form 12
TABLE 1.3	Coaching brief and contract 15
TABLE 1.4	Aims of meetings and schedule 17
TABLE 1.5	Coaching self-assessment questionnaire 19
TABLE 1.6	Checklist for establishing contract rules 23
TABLE 1.7	Action plan 27
TABLE 1.8	Reflection and evaluation 29
TABLE 1.9	Coaching session evaluation 32
TABLE 2.1	Listening levels 35
TABLE 2.2	Listening model: the four Rs of effective listening 36
TABLE 2.3	Questioning techniques 41
TABLE 2.4	ORACLE model 51
TABLE 2.5	ORACLE overview 52
TABLE 2.6	Questions for the different steps of the ORACLE model 54
TABLE 3.1	Creating powerful intentions: template 65
TABLE 3.2	Goal-setting framework 68
TABLE 4.1	Logical levels 82
TABLE 4.2	Positive problem solving 85
TABLE 5.1	Reducing stress 95
TABLE 5.2	Changing negative thought patterns 98
TABLE 5.3	Values 102
TABLE 5.4	Prioritizing values 105
TABLE 5.5	Example of prioritizing values 106
TABLE 5.6	Belief assessment 109
TABLE 6.1	Negative language indicators 113
TABLE 7.1	Behavioural conflict resolution 120
TABLE 7.2	Analysing and resolving conflict 123
TABLE 8.1	Communication skills audit: feedback sheet 130
TABLE 8.2	Communication skills audit: overall results 132
TABLE 8.3	360-degree feedback questionnaire 136
TABLE 8.4	360-degree feedback: overall results 139
TABLE 9.1	Team climate inventory 148
TABLE 9.2	Improving the delegation process 151

TABLE 9.3	Delegation planning 155
TABLE 9.4	Delegation framework 156
TABLE 9.5	Effective delegation checklist 157
TABLE 9.6	Example prioritizing grid 160
TABLE 9.7	Prioritizing grid 161
TABLE 9.8	Importance–urgency grid 163
TABLE 10.1	Life events chart: part one 167
TABLE 10.2	Life events chart: part two 168
TABLE 10.3	Discovery model 172
TABLE 10.4	Ideal work designer: part one 175
TABLE 10.5	Ideal work designer: part two 176
TABLE 10.6	Managing my career 179
TABLE 11.1	Strengths feedback example 184
TABLE 11.2	Strengths portrait example 184
TABLE 11.3	My strengths 185
TABLE 11.4	Strengths feedback 186
TABLE 11.5	My strengths 187
TABLE 11.6	Defining the inner team 193
TABLE 11.7	Emotional intelligence through modelling 197
TABLE 11.8	Emotional intelligence through modelling 200
TABLE 13.1	How much do I want it? 225
TABLE 13.2	Short-form assessment of current strength of resilience characteristics 251
TABLE 14.1	Self-reflection tool: Why is the person under performing? 263
TABLE 14.2	Preparation for talent discussion 266
TABLE 14.3	Job characteristics 1 267
TABLE 14.4	Job characteristics 2 269
TABLE 14.5	Coaching upwards 276
TABLE 15.1	Coaching package topics 284
TABLE 15.2	Calculating sales leads 291
TABLE 15.3	Worksheet: Getting systems to work for you 305

FOREWORD

This coaching toolkit contains a selection of forms, models and exercises, and an explanation of how and when to use them. We have also included a chapter on setting up the coaching relationship, which provides valuable resources on managing the coaching relationship and supports your own continuous development.

The toolkit is designed to be used like a reference document so that you can dip into the topic you need when you need it. Each tool contains an overview and model diagram to provide both the words and the big picture.

If you want to download the tools, you will find all the templates on the Kogan Page website. Please feel free to use these forms, but we do ask that you give us credit when you use them.

To help you get the most out of your toolkit, as an added bonus we have recorded some samples of the tools so that you can watch them on the Kogan Page website. Watching the tools in action demonstrated by the authors will add considerably to the experience, as you will see some of the questions that enhance the use of the tools. Enjoy our 50 top coaching tools. To access both the templates and the demonstrations go to: **www.koganpage.com/50tt5**

If you would like to buy the DVD with 10 of the key tools demonstrated in full, or to find out what other coaching resources we offer, go to our websites **www.emergeuk.com** and **www.growtalentro.com**.

PREFACE

Gillian

We have no idea what the world is going to look like when we come out of the Covid-19 pandemic, and we can only hope that there will be a business world and that the economy will manage to hold up. As always writing with my co-author Ro, who is based in Australia, has been a great experience – fortunately we are used to remote working which is the way the whole world is working now. Ro has also authored some other excellent books on group coaching and talent management which are really useful to read in conjunction with this.

However, even though we cannot predict the shape of the business landscape to come, what we do know is that coaching is, and will still be, a massive part of our world. During the last two weeks I have had to really review my style as a leader so I can support my staff through these difficult times and coaching has been more important than ever to keep up morale. There is so little that can be done to practically help them to cope with isolation that allowing them to talk and listening at the highest level are imperative. And for any managers during this period and afterwards coaching will be absolutely critical to keeping their team together, productive and able to cope.

Ironically, we had already decided to include a chapter on coaching for managers in this edition and these tools will be vital to anyone who has people who report to them, whether directly or indirectly. In the training that we deliver to managers we spend huge amounts of time discussing how to manage performance, how to develop talent and how to coach people through conflict or through change so we are delighted to use this edition to introduce some tools to support these areas.

In 2017 when we published the fourth edition, I felt that the world of coaching had changed beyond recognition, both in the way coaches perform and in the way organizations utilized external coaching. And in 2021 it has changed even further. There are thousands more coaches available and organizations use them very differently, for personal coaching, career coaching and business coaching. However, while clients are much better at selecting external coaching, using effective processes and working with external coaching organizations, I still see them struggling with measuring the impact of coaching and truly realising value from the process, particularly at a very

senior level. There is progress and we should congratulate those clients who are truly managing the process and their investment and share this good practice with others. However, we cannot take our eye off the ball in continuously looking for ways to demonstrate that coaching is working in organizations

As I reflect on my coaching journey in the last ten years, I have been lucky enough to coach CEOs and Managing Directors from a whole variety of disciplines, finance, media, music, engineering, defence, construction and many others and, as they grow and develop, so do I. As one of the earliest adopters of coaching over 20 years ago, I have watched the philosophy of coaching evolve and take shape and in our business we have applied many different tools to work on major contracts with clients.

As a female Managing Director and owner of my own business consultancy for the past 20 years, I have always been keen to support women's development and have been fortunate enough to coach senior women in a whole range of positions. I particularly enjoyed working with females from every walk of life and, in doing this, have learned a lot about the challenges women are facing in the workplace, both internally and externally. This led me to take on the challenge of designing a women's development programme that we now run internationally called RISE. We run this in the Middle East and also in Saudi which has given us great insight into how to shape the coaching offering for women.

In our last edition we included a new chapter on coaching women in development. It feels like that it is only the past eight years that diversity and inclusion has upped its game and now is high on everyone's agenda – but is it something that organizations really want to solve or is it just lip service? Some organizations truly seem dedicated to growing their female talent but in some situations, it is difficult to tell. Sadly, research seems to suggest that if we continue to increase our attention on women's development at the current rate it will be 100 years before we get true gender parity. Not soon enough!

There has been a huge shift in the last three years on gender parity and how organizations are supporting their female population to get to board level, or just to feel that they are being fairly treated so we are glad that we have included a chapter on women's development. However, a big problem is that women feel uncomfortable about sharing their strengths, and often, when I am coaching women, they tell me that the visibility and networking part of business is truly difficult for them. They consider it 'politicking' or feel they are showing off and are extremely uncomfortable. Yet research has clearly shown that it is simply not good enough for us to do a great job nowadays.

This message does not always sit comfortably with women. Doing a great job may get you a pay rise but won't necessarily get that promotion. To be

highly promoted you need to pay attention to your performance, your image and also your visibility, gaining exposure to a broad range of stakeholders.

Combine this with the research from neuroscience that helps us to understand the true differences between the way men and women's brains operate, in particular the fact that women are far more risk-averse than men and we are beginning to bring some of the important issues into focus.

So this is where we need to focus our attention when coaching women – helping them to understand what they bring to the table, to feel comfortable about discussing their strengths, promoting themselves and talking about their achievements.

This, coupled with the very prevalent condition we call 'imposter syndrome', forms a big part of coaching conversations with women. It still never ceases to amaze me when I start to coach senior women holding down very important positions in huge corporations and as we gain rapport they say to me 'I keep waiting for someone to catch me out!' Even though they have worked tremendously hard to gain qualifications, knowledge and experience, and have beaten many others to achieve great promotions they often still don't feel that they are worthy and believe that others in similar positions are more talented, better qualified, or more connected. Therefore, when coaching women, we are helping them deal with both internal and external challenges.

Our tools for developing women will help you to coach females through many issues – yes, of course, they would be relevant to men as well but they were particularly designed for a female audience so we will leave it to you to try them out and to decide who they work best!

And finally, for any of you in the coaching profession, you will recognize the importance of supervision in coaching. So we are delighted that in this edition we can include two chapters from an incredibly talented supervisor, Mark Bisson. Mark has been my supervisor for many years and his challenge and support has helped me through many situations. Mark is an international credentialed coach (PCC) and coach supervisor and author of *Coach Yourself First – A coach's guide to self-reflection* and I sure that you will find those techniques useful in improving your coaching practice.

I hope you enjoy this new edition, continue to develop your practice and find the extended tools helpful to you in this new world.

Ro

Gillian and I first collaborated on *50 Top Tools for Coaching* in 2008. That was over 10 years ago and the world has changed – a lot. Back in 2012

I emigrated from the UK to Western Australia to one of the most isolated cities in the world, Perth. Coming to Australia meant I experienced change at a personal level. I had to relearn what I knew and discover how to navigate a different culture. I have realized that organizations are not just a collection of individuals they also take on a life of their own outside the sphere of the individual. So even when people leave the organization, the culture continues.

When we began this edition in 2020, it was a challenging start to the year for us in Australia. We've had bush fires that ravaged landscape, caused loss of life and destroyed livelihoods. Covid-19 is affecting everyone across the globe. Never has there been a more important time to collaborate and coach both ourselves and others.

The advent of Agile

Coaching people one on one makes a huge difference to the individual; the benefits for the organization will be less, particularly where they are seeking systemic change in the organization. Group coaching is fast becoming popular here in Australia through the advent of Agile practices – even though Agile has been around since 2001, borrowing much from Lean and organizational development.

Team and group coaching has always been something I've enjoyed and coaching self-organizing or self-managed teams is a great by-product of the Agile movement. It's top of mind for many, along with virtual coaching and learning. Going virtual is proving a key turning point for coaches as the effects of the pandemic are likely to change our working practices for years to come. Many of the tools in this book can be adapted to a virtual environment and provide inspiration and ideas for how to work with groups and teams. Being able to flex and adapt are at the heart of Agile.

So what is Agile? Agile is an iterative approach for developing software which is being adopted more widely for other types of organizational change. There are four core values and twelve principles within Agile and these have spawned over 40 methods, practices and processes and others that are no doubt being used but not yet popularised. Many of these tools and methods are borrowed from other disciplines like continuous improvement and organizational development.

This move to work more Agile provides both challenges and opportunities. The challenges – keeping the essence of coaching without overly directing individuals on a set course. The opportunities arise from the natural development of coaching practices that create a coaching climate. The organization has the potential to change their culture through coaching

without stating that as their intent. At the heart of Agile is the notion of servant-leadership which fits well with the notion of ego-free coaching that is dear to my heart.

My inspiration for coaching

My coaching journey started in 2002 when I learnt first-hand what it meant to be coached. I owe much to my first coach, who inspired me to train as a coach. From those early days of my coaching training in 2004 I realized I had already been ‘doing’ coaching. It was just the start of a discovery process that fed my love of learning and personal growth. Back then I reignited my reading bug and read so many books, articles and magazines about coaching that my head was full to bursting. From the feedback about this book over the past 11 years I realize that it has helped many other coaches at the start of their coaching journey. We are grateful to all the people who have purchased this book and hope it has helped in some small way their coaching practice. We have now been translated into Korean and Czech with other translations in the pipeline as well as an audio version. Spreading the word about coaching is something we both feel strongly about and are humbled and in awe of the level of engagement from the coaching community. We thank you.

Remembering our roots helps us understand how we arrived at our current position. In the first edition, I talked about the concept of coaching and how it has been around since ancient times. Perhaps most famously in ancient Athens. Having studied Classics, I am of course biased. Ancient Greek philosophers still inspire my coaching today and Socratic dialogue shows us that Socrates, as described by Plato, was the first true coach. His questioning style was designed to examine self-awareness and in doing so allow the person being questioned to discover the truth about themselves. Coaching is about developing a self-awareness and from there taking action to improve.

We are also seeing a move towards coaching people in groups as organizations realize individuals operate within the organizational system. Those organizations leveraging the power of groups, taking a more systemic and strategic approach to coaching, are showing the greatest results.

Organizations are even more complex

Organizational complexity requires a different set of skills to those that had utility in the dawn of the industrial age. Many organizational models now focus on working in complex systems. Since first writing about coaching I have also added Lean Change to my toolkit. In essence this captures

continuous improvement, start-up approaches and behavioural economics around an iterative learning process. This has added to and informed my coaching philosophy and led to the development of one of the tools included in this fourth edition – Coaching Manifesto.

Needless to say, there are still three core skills I use to train managers in coaching skills and keep front and centre when I am coaching – either individuals or groups. Those three skills are: listening, questioning and feedback. On the surface, they seem simple. As you read through these tools you will realize that there are different levels of mastery. I call these levels transactional, transitional, and transformational. The more you move towards transformational the less you will be practicing the skill and the more the skill will become part of how you naturally coach.

In my experience of working with clients they usually present you with task-based or transactional-type outcomes first. When the client starts to trust the process more they gradually open up and self-awareness leads to more transformational type conversations. At this deeper level of conversation, the dynamic of the coaching relationship changes. One aspect of using tools is that the tool itself is merely a vehicle to enable the client to achieve what it is they are seeking from the coaching. If you find that you are becoming too attached to the tool itself or tend to use the same tool over and again, perhaps it's time to change, so mix it up with something different.

Coaching people during change is something we've added to this edition along with coaching women in leadership. Gillian and I were spotting some key trends in the work that we do and felt we wanted to develop the breadth of the tools offered. We have therefore removed some tools from this edition of the printed book and put them online. In reality, you have access to some 70 tools both in the print and online edition of the tools.

Gillian mentioned my other books on group coaching and talent. We've included some of the tools in this fourth edition with changes to formatting to fit the style of this book. *Group Coaching: A Practical guide to optimizing talent in any organization* explores the role of the group coach and how to create your own group coaching processes and tools. Many of the tools in this book can be adapted to suit your specific requirements and we've included a tool to help you with just that.

In *Are they on the Right Bus: The 55-minute guide to talent management* I explore the nature of talent and how organizations miss out on some of the core strengths of their people by focusing on too few 'talented' individuals. The underpinning concept of coaching is that we all have potential. Our role as coaches is to help those who want to improve and optimize their career, life and relationships.

In our book on *How to Create a Coaching Culture* Gillian and I build on many of the underlying principles of coaching and apply them to an organizational setting. We both believe engaged employees will not only perform better at work but they'll also have a healthier view on life in general. This foundation creates a working environment where everyone can be at their best, feel valued, and acknowledge their contribution to the organization regardless of their role.

We hope you enjoy discovering new tools, reacquainting yourself with some old favourites and experimenting with creating some tools yourself. Let us know your stories of using the tools and what you've created yourself.

Have fun!

ACKNOWLEDGEMENTS

With thanks to all the coaches who have contributed to this edition. We would like to acknowledge Lisa Gray, Diane Herbert, Debbie Mitchell, Rob Bartlett, Bruce Hoverd, Julie Standfield, Kate Burton and Gayl Long for contributions towards the book. Also thanks to Jason Little for sharing his Lean Change tools and for Ro's colleague and partner in change, Charlotte Mawle, for co-creating perspective mapping and being willing to experiment with group coaching and to Lisa Wood, who inspired Ro to create a Coaching Manifesto.

Most importantly, a huge thank you to Dawn Newson for her tireless formatting of the book – we couldn't have done it without you.

Gillian and Ro