

**COACHING FOR COMPETENCIES  
LEADERS' SESSION**

**FACILITATOR'S GUIDE**

**NOVEMBER 2010**

## TABLE OF CONTENTS

How to Use This Guide.....	2
Materials .....	3
Equipment and Facilities.....	4
Agenda .....	5
Welcome, Objectives and Agenda.....	6
Assessing Direct Report Competencies .....	9
Coaching for Competencies .....	16
Activity: Competency Discussion Challenges.....	26
Development Planning.....	27
Preparing for a “Coaching for Competencies” Discussion.....	31
Summary, Wrap-up, and Adjourn.....	33

## HOW TO USE THIS GUIDE

You will be facilitating the *Coaching for Competencies* workshop for all leaders who have director reports. It is designed as a half-day session, approximately 3.5 hours. This Facilitator's Guide will support you in preparing for and delivering this workshop.

The Facilitator's Guide is divided into sections. Each section covers a segment of the training session. The heading for each section indicates the topic that will be covered. On the right-hand side of the page below the heading is the approximate number of minutes required to complete the topic.

Each slide to be discussed appears at the top of the page. Underneath each slide are the information and/or instructions to be conveyed to participants. Possible trigger questions you can ask about the topic to engage participants in discussion may also be included.

**NOTE:** While you want to respect the content outlined, try to convey the messages in your own words as much as possible. This will provide a more enjoyable and meaningful session for the participants.

## MATERIALS

Following is a list of the materials to be used in this workshop:

### Facilitator's Materials:

- Facilitator's Guide (this document)
- Slides on disk for LCD projector
- Tent cards
- Markers
- Masking tape

### Participant Materials/Handouts/Tools:

Provide participants with the following materials – these can be assembled into a binder or pocket folder:

- Copies of the slides** – these can be printed 1 slide per page in Notes page format to give participants room to write notes, or two slides per page.
- Competency Assessment Questionnaire (CAQ) (**Note:** Since the CAQs are customized to the role, ensure you have copies for each role.)
- Competencies Discussion Planner
  - Manager Version
  - Employee Version
- Workshop Evaluation form

### Flipcharts (to prepare prior to the session):

- Objectives** (write the objectives from slide 2 on a piece of flipchart paper so that you can post them and keep them top of mind throughout the session)
- Workshop Expectations** (put this title at the top of a piece of flipchart paper)
- Parking Lot** (put this title at the top of a piece of flipchart paper and post it in the training room so that you or participants can capture questions or issues to be covered at a later point in the session)

## EQUIPMENT AND FACILITIES

Following is a list of the equipment and facilities you will need to deliver the training program:

- LCD projector
- Screen
- Flipchart stands and flipchart paper (a minimum of two; ideally one per group of 4-5 participants)

### **Here are some recommendations for the facilities and how to set them up:**

You will need a main meeting room:

- Set up the main meeting room to accommodate the number of participants – ideally no more than 16-20 per session.
- Write out the workshop objectives on a flipchart, in advance of the session, so that you can post it when you discuss the objectives. The objectives should be visible throughout the training.
- Post the prepared flipcharts on the walls.
- Ensure you have space (if possible, beside the LCD projector) for your facilitator notes. In addition, have a table set up at the side for supplies. At the front of the room, have a screen and ideally two flipcharts.
- In addition, have at least one flipchart per 4-5 participants, or paper if flipchart stands and paper are not available.

## AGENDA

<b>TIME</b>	<b>TOPIC</b>
0:00	Welcome, objectives and agenda
0:15	Assessing direct report competencies
1:25	Coaching for competencies
1:45	<b>BREAK</b>
2:00	Coaching challenges
2:30	Development planning
2:45	Activity: Preparing for a “coaching for competencies” discussion
3:20	Summary and Wrap-up
3:30	<b>ADJOURN</b>



## SHOW OH1 (Coaching for Competencies)

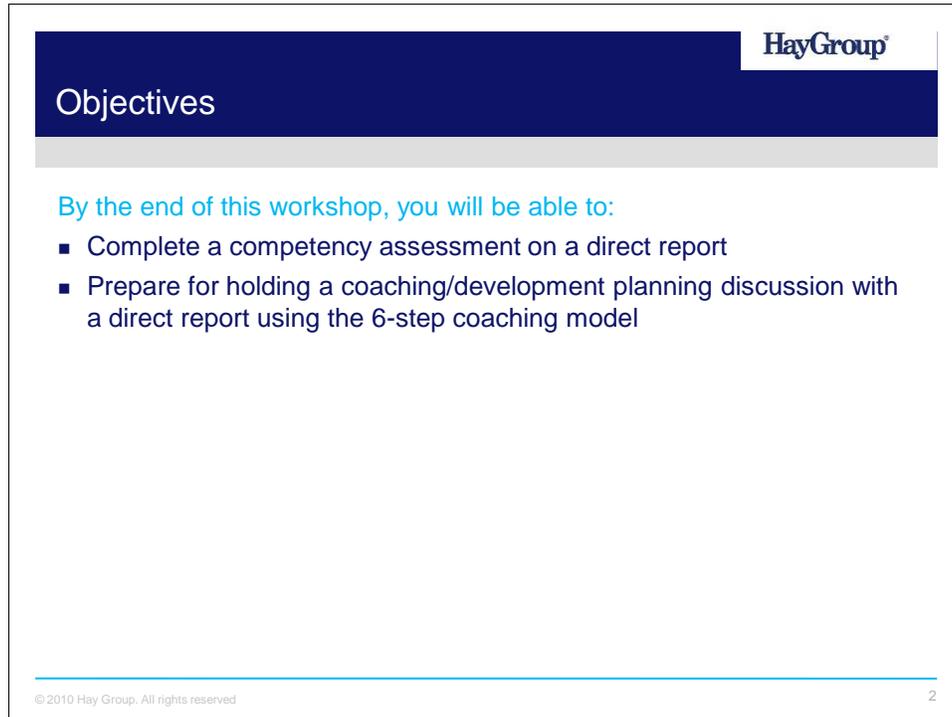
**Welcome** participants to the Coaching for Competencies workshop, which is designed for all managers/leader with direct reports.

**Explain** why this is a separate session for managers/leaders:

- So, why a separate session? As leaders, you play a key role in facilitating the development of your direct reports
- This involves:
  - Accurately assessing direct reports against the core competencies
  - Helping direct reports to create an individual development plan that is aligned with vision, mission and direction of the agency and sector
  - Providing ongoing feedback and coaching
- This session is designed to provide you with the necessary knowledge, experience and tools to be better coaches and mentors for your people and to help you support their development particularly with respect to competencies.
- It will also provide you with a more thorough understanding of competency target levels depending on your level in the organization, and, therefore, allow you to accurately assess a direct report's performance relative to competencies.

## WELCOME, OBJECTIVES AND AGENDA, CONTINUED

Timing: 15 minutes  
0:00 – 0:15



The slide features a dark blue header with the word "Objectives" in white. The HayGroup logo is in the top right corner. Below the header, the text "By the end of this workshop, you will be able to:" is followed by two bullet points. At the bottom left, there is a copyright notice, and at the bottom right, the number "2" is displayed.

Objectives

By the end of this workshop, you will be able to:

- Complete a competency assessment on a direct report
- Prepare for holding a coaching/development planning discussion with a direct report using the 6-step coaching model

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### SHOW OH2 (Objectives)

**Facilitator Note:** If you have not already done so, post the flipchart that you prepared of the workshop objectives on the wall so that they remain “top of mind” for participants.

Review objectives and explain:

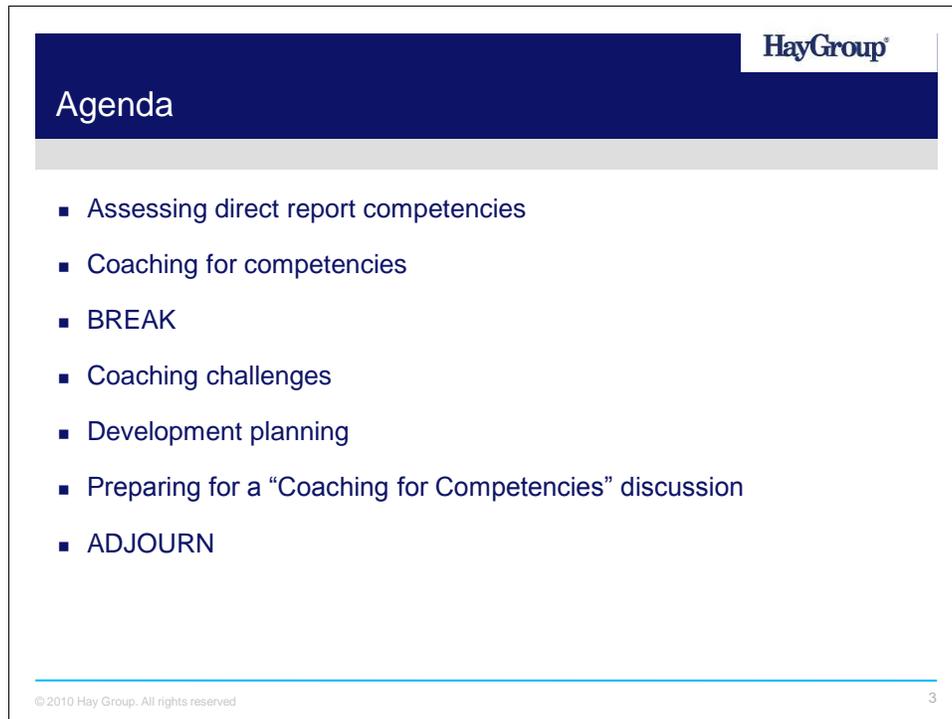
- By the end of today, you will be able to:
  - Complete a competency assessment on a direct report
  - Prepare for holding a coaching for competencies and development planning discussion with a direct report using the 6-step coaching model

**Ask** the group if they have any other expectations/learning goals for the session.

**Facilitator Note:** While participants are sharing their expectations for the session, flipchart their responses and post them on a wall in the training room.

## WELCOME, OBJECTIVES AND AGENDA, CONTINUED

Timing: 15 minutes  
0:00 – 0:15



The slide is titled "Agenda" and features the HayGroup logo in the top right corner. The agenda items are listed as follows:

- Assessing direct report competencies
- Coaching for competencies
- BREAK
- Coaching challenges
- Development planning
- Preparing for a “Coaching for Competencies” discussion
- ADJOURN

At the bottom of the slide, there is a copyright notice: © 2010 Hay Group. All rights reserved. and a small number 3 in the bottom right corner.

### SHOW OH3 (Agenda)

Review the agenda for the workshop with participants.

- The first thing we will be doing today have you complete a CAQ on a direct report.
- We will then focus on your role as manager/leader with respect to coaching for competencies and development planning.

#### Facilitator Notes:

1. Let participants know about the **Parking Lot** flipchart – explain that the Parking Lot flipchart will be used to capture any related issues or unanswered questions that will be followed-up at the end of the workshop (or at a relevant point in the session).
2. **Walk** participants through their participant materials. Explain that a copy of the slides is included in the materials and they can take notes directly on the slides if they wish.



### **SHOW OH4 (Assessing direct report competencies)**

**Transition** to the first component of the workshop – assessing the core competencies of a direct report.

**Explain** that the objectives for this section are to:

- Review the principles and stages of competency assessment
- Complete a paper-based assessment of a direct report to determine their current level of performance relative to each competency, and to identify developmental opportunities



### Principles of competency assessment

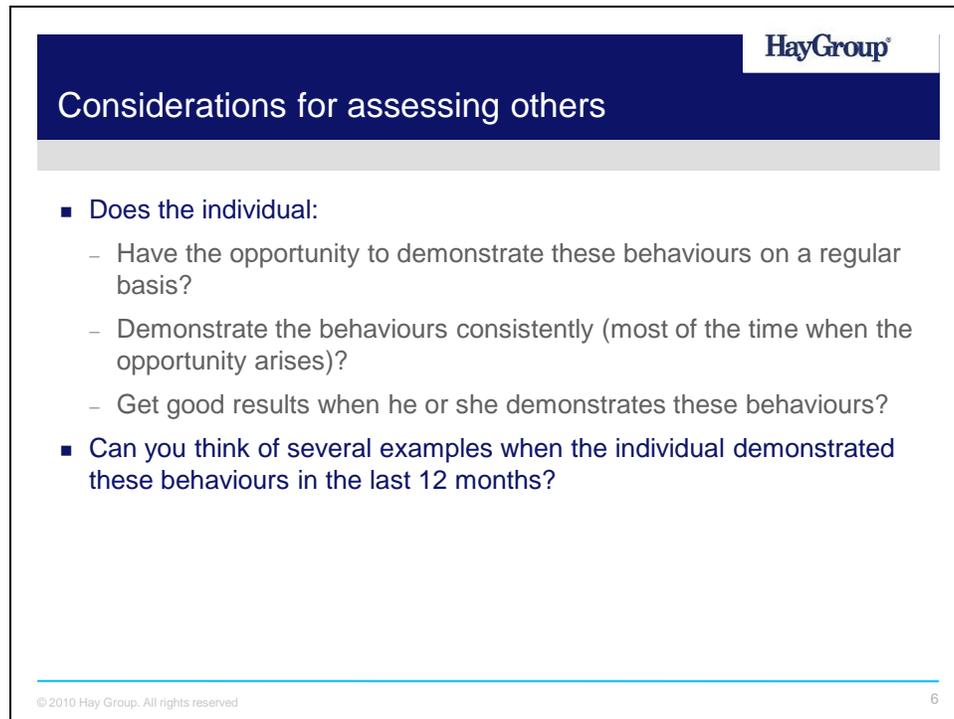
- Use the Competency Assessment Questionnaire (CAQ) to assess direct reports
- Assessment is based on actual behaviour
- Consider (ask) the intent at the time of behaviour
- Base assessments on consistent behavioural patterns, not one-time examples
- Gather information from a variety of sources

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### SHOW OH5 (Principles of competency assessment)

**Review** the principles of assessing competencies.

- We mentioned earlier that you need to keep the following principles in mind when assessing others' competencies:
  - An assessment of behaviour must be based on actual performance that occurred some time in the past and not on what someone might do in the future.
  - You need to consider the person's intent at the time the behaviour took place (i.e., you need to ask the person to describe his/her intention).
  - To identify a behaviour pattern, you must have observed the behaviour on a consistent basis (one-time, isolated examples are not adequate).
  - Typically, validity is increased when the data is gathered from a variety of sources (i.e., data from a manager, peer, a compilation of assessment data from direct reports and a self-assessment is most valid).



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### Considerations for assessing others

- Does the individual:
  - Have the opportunity to demonstrate these behaviours on a regular basis?
  - Demonstrate the behaviours consistently (most of the time when the opportunity arises)?
  - Get good results when he or she demonstrates these behaviours?
- Can you think of several examples when the individual demonstrated these behaviours in the last 12 months?

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### SHOW OH6 (Considerations for assessing others)

Review the following question and answers with participants:

- Similar to completing your self-assessment, when assessing others you again need to consider the following:
  - Does the individual:
    - Have an opportunity to demonstrate these behaviours on a regular basis?
    - Demonstrate the behaviours consistently (most of the time, when the opportunity arises)?
    - Get good results when they demonstrate the behaviours?
  - Can you think of several examples when they demonstrated these behaviours in the last 12 months?

**Evaluation pitfalls**

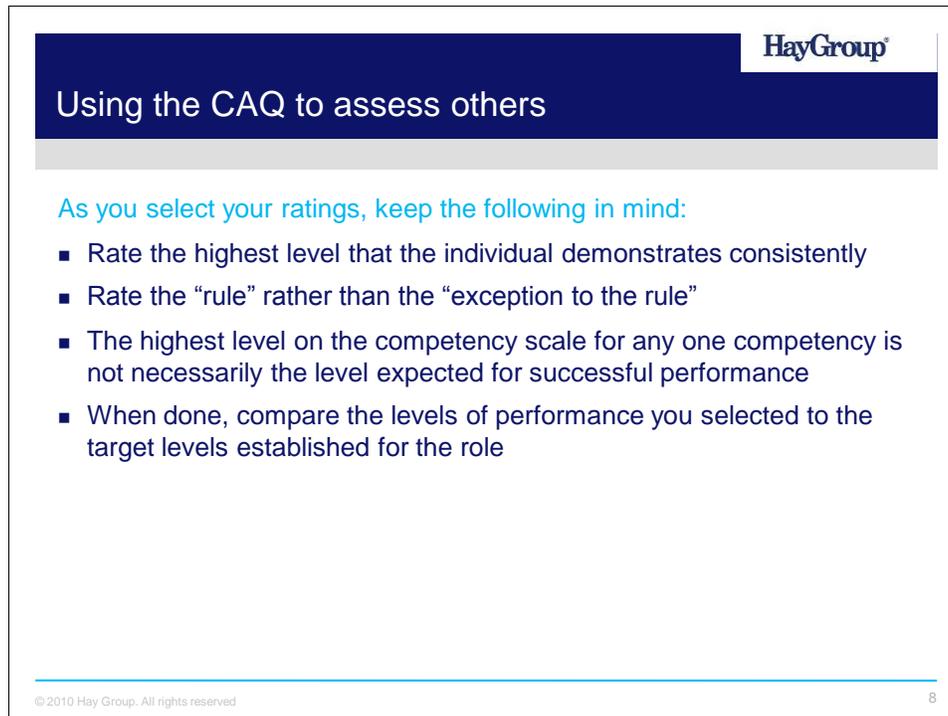
- The Halo Effect
- Stereotyping
- The Central Tendency
- The Recency Effect
- Length of Service Bias
- The Initial Impression
- Lack of documentation

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### SHOW OH7 (Evaluation pitfalls)

**Review** the common errors or pitfalls people often make in assessing others.

- When assessing another individual, it is important to be as objective as possible. While the assessment process in place helps to ensure objectivity, we all may be guilty from time-to-time of any one of the following evaluation pitfalls. Understanding what these common pitfalls and keeping them in mind will help to ensure an objective and accurate assessment:
  - **The Halo Effect:** Allowing one single event (positive or negative) to bias your overall perception or performance.
  - **Stereotyping:** These are pre-supposed assumptions about someone without evidence or grounding.
  - **The Central Tendency:** Lumping all direct reports in the same category to avoid conflict; or “averaging” out a direct report’s performance.
  - **The Recency Effect:** An entire year’s performance can be biased by a major error committed or a major success that occurred just prior to the review.
  - **Length of Service Bias:** A longer term on the job is assumed to mean greater competence or higher performance.
  - **The Initial Impression:** Good or bad initial impressions that just don’t go away.
  - **Lack of documentation:** Not grounding the review with specific examples from throughout the year.



**Using the CAQ to assess others**

As you select your ratings, keep the following in mind:

- Rate the highest level that the individual demonstrates consistently
- Rate the “rule” rather than the “exception to the rule”
- The highest level on the competency scale for any one competency is not necessarily the level expected for successful performance
- When done, compare the levels of performance you selected to the target levels established for the role

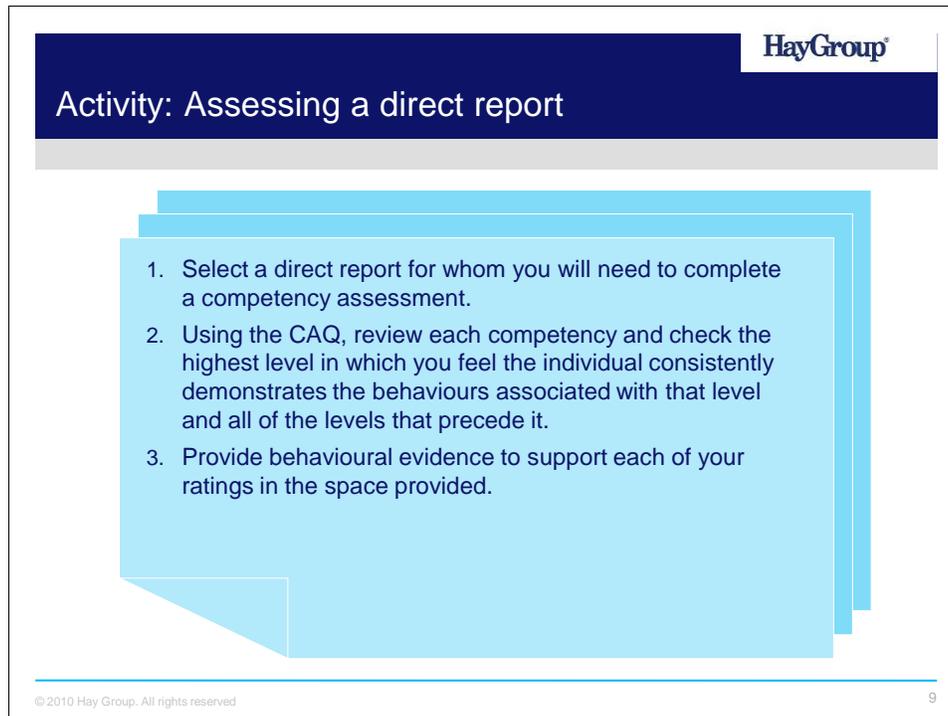
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### SHOW OH8 (Using the CAQ to assess others)

**Review** the important guidelines to follow when completing a CAQ on a direct report.

- Now that you’ve heard about some of the evaluation pitfalls, let’s discuss how to use the CAQ to assess others.
- As you complete the CAQ and indicate your ratings (i.e., determine the level of performance), keep the following in mind:
  - Rate at the highest level that you have observed this individual demonstrate consistently
  - Rate the “rule” rather than the exception to the rule
  - The highest competency level for any one competency is not necessarily the competency level expected for successful performance – target competency levels are based on the nature of the job and role
  - After initial ratings have been made, go back over the ratings and compare the indicated level of performance selected to the behavioural target levels set for the level in the organization
  - Comments made should always be positive

**Facilitator Note:** Remind participants that this kind of assessment process takes practice; like any other new skills, it will take time to develop a comfort level with using this new tool as an evaluation tool of others.



The slide features a dark blue header with the HayGroup logo on the right and the title 'Activity: Assessing a direct report' in white. Below the header is a light blue box containing three numbered steps. At the bottom left of the slide, there is a small copyright notice: '© 2010 Hay Group. All rights reserved'. At the bottom right, there is a small number '9'.

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**Activity: Assessing a direct report**

1. Select a direct report for whom you will need to complete a competency assessment.
2. Using the CAQ, review each competency and check the highest level in which you feel the individual consistently demonstrates the behaviours associated with that level and all of the levels that precede it.
3. Provide behavioural evidence to support each of your ratings in the space provided.

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### **SHOW OH9 (Activity: Assessing a direct report)**

**Review** the instructions for this exercise with participants.

**Facilitator Note:** Prior to the session, ensure you are aware of the various roles reporting to participants are so that you can have the appropriate CAQs on hand.

**Instruct** participants to:

1. Select a direct report on whom you would like to complete a competency assessment.
2. Using the CAQ, review each competency and check the highest level in which you feel the individual consistently demonstrates the behaviours at that level and all of the levels that precede it.
3. Provide behavioural evidence to support each of your ratings in the space provided.

**Facilitator Note:** Suggest to participants that to get the most benefit out of this exercise, they may want to pick someone who will be more challenging to assess.



## Identifying competency strengths and gaps

- If the scored level is on or above the target level, this indicates a competency strength
- If the scored level is below the target level, this indicates a competency gap

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### SHOW OH10 (Identifying competency strengths and gaps)

**Explain** how to identify competency strengths and gaps as follows:

- Once you've completed the CAQ, look for competency strengths and gaps by comparing results to the target levels as follows:
  - If the scored level is *on or above* the target level, this is a *competency strength*
  - If the scored level is *below the target level*, this indicates a *competency gap* -- an area where the individual should focus their development efforts
- Remember, the target level is aspirational, reflecting superior performance, so there will most likely be gaps.

### Q What are some challenges in completing the CAQ?

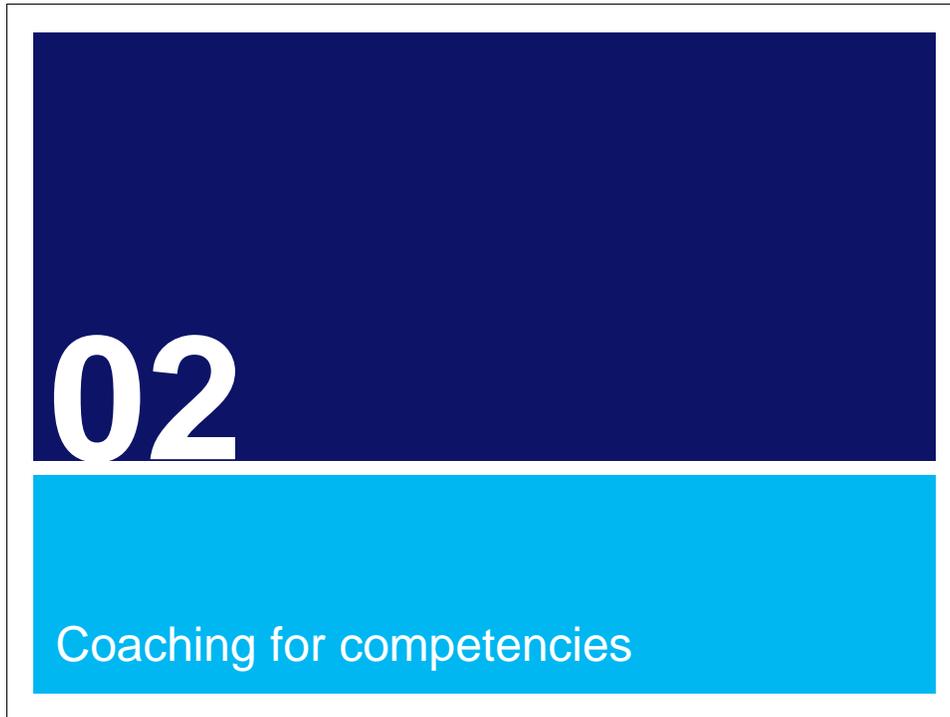
Solicit and flipchart responses.

**Facilitator Note:** Sample responses include: Not enough information; Haven't had the opportunity to observe the individual demonstrating the competency; The role doesn't provide an opportunity to demonstrate the competency, etc.

### Q How can we resolve some of these challenges?

Solicit responses

**Facilitator Note:** Sample responses include: Obtaining information from a variety of sources, Asking the individual to share examples of when they have demonstrated a particular competency, etc.



### SHOW OH11 (Coaching for competencies)

- Once you have assessed your direct report, and your direct report has completed a self-assessment, the next step in the process will be for you to meet with the employee for a coaching for competencies/review discussion.
- The assessment data is designed to be used by both you and the employee as a basis or framework for discussion – it is not, by any means, a final assessment of performance.
- We're now going to spend some time discussing how to hold that coaching for competencies discussion in which you and the employee will come to agreement on the competency levels demonstrated by the direct report.
- In this section of the workshop we'll:
  - Review effective techniques/behaviours for coaching for competencies
  - Provide a framework for holding the competency development discussion
  - Equip you with the necessary knowledge and skills to support your direct reports in their competency development
  - Share and discuss coaching challenges you anticipate



The slide features a dark blue header with the title 'Coaching for competencies' and the HayGroup logo. Below the header, a bulleted list describes coaching as a genuine intent to foster long-term learning and development through formal/informal coaching, motivating, and mentoring. It also states the goal is to fulfill current and future competency and skill requirements for individuals, the team, and World Vision. The slide includes a copyright notice for 2010 Hay Group and the number 12 in the bottom right corner.

**Coaching for competencies**

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- Coaching involves a genuine intent to foster the long-term learning and development of others through:
  - Formal and/or informal coaching
  - Motivating
  - Mentoring

to fulfill the current and future competency and skill requirements of individuals, the team, and World Vision

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### SHOW OH12 (Coaching for competencies)

**Hold** a discussion on what coaching is.

#### **Q** What is coaching?

Solicit responses.

- Coaching involves a genuine intent to foster the long-term learning and development of others through formal and informal coaching, motivating and mentoring direct reports. (Remind participants that this is the focus of the Developing Others competency.)
- Coaching is most effective when done both formally and informally and at the frequency best suited to the person being coached. Formal coaching is most often done in a meeting format and may cover more than one performance area.
- Informal coaching is done typically “on the job” or “in the moment.” It also involves simple things such as answering questions, providing tips or advice, giving brief feedback, providing encouragement, or correcting how an individual is performing a task.

The slide features a dark blue header with the title 'Importance of coaching' in white. The HayGroup logo is in the top right corner. The main content is a list of five bullet points. At the bottom, there is a copyright notice and the number 13.

**Importance of coaching**

- Enables direct reports to perform better
- Helps to guide future performance
- Provides opportunities for surfacing and sharing needs, concerns and expectations
- Refocuses efforts on what's important
- Enhances motivation, commitment and ultimately job satisfaction

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### SHOW OH12 (Importance of coaching)

Discuss the importance of coaching.

### Q Why do we coach – why is it an important part of your role as a manager/leader?

Solicit responses

- Coaching is important for a number of key reasons. It:
  - Links individual performance to business strategy so employees are doing the right things relative to their roles and business needs
  - Helps to guide present and future performance by providing feedback, encouragement and support
  - Provides opportunities for employees to express their needs, concerns, expectations so these can be addressed and accommodated as appropriate
  - Refocuses efforts by engaging the employee in dialogue about what is being done and how it is being done
  - Enhances motivation, commitment and ultimately job satisfaction by engaging the employee directly in his/her own performance assessment and development
- Coaching is not a short-term solution; but instead a long-term strategy.
- Let's talk about the differences between effective and ineffective coaching.

## COACHING FOR COMPETENCIES, CONTINUED

Timing: 20 minutes  
1:25 – 1:45

**Q Think about the “best coach” you have ever worked with. What went well? What did they do effectively? How did you feel?**

Flipchart responses. Sample responses include

- *Demonstrate good listening skills*
- *Be supportive*
- *Give specific feedback, both positive and negative*
- *Provide encouragement and support*
- *Be patient and show respect*

**Q Think about the “worst coach” you have ever worked with, a situation where this person didn’t do well as a coach. What didn’t go well and why? How did you feel?**

Sample responses:

- *Did most of the talking or didn’t receive any coaching at all*
- *Provided negative feedback that was not constructive*
- *Didn’t ask open questions or what the employee thought/felt*
- *Impatient*
- *Judgmental*
- What we’ve done here is develop a behavioural coaching profile that shows, by our own definition, what we need to do to be effective coaches.
- Now, think of your “best coach” scenario again:

**Q What impact did this coach have on your performance and development? How did the coach influence your feelings about your role and the organization?**

Solicit responses and record on a flip chart page.

- Now think about your “worst coach” scenario:

**Q What impact did this coach have on your performance and development? How did this coach make you feel about your role and the organization?**

Solicit responses and record on a flip chart page.

- What this tells us is the impact that effective coaching – and ineffective coaching – has on performance and its value to individuals and the organization. This is why coaching is an important aspect of your role as a manager/leader.

The slide features a dark blue header with the title 'Keys to effective coaching' in white. The HayGroup logo is in the top right corner. Below the header, four bullet points are listed in blue text. At the bottom left, there is a small copyright notice, and at the bottom right, the number '14' is displayed.

**Keys to effective coaching**

- Positive and constructive, to support continuous improvement and growth
- Participatory – employees are involved in all stages of decision making
- Self-directed – employees assume primary responsibility for managing their own improvement and development
- Future-oriented, focusing on future performance, not on past mistakes

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### **SHOW OH 14 (Keys to effective coaching)**

**Review** the keys to effective coaching:

- Coaching should be positive and constructive, to support continuous improvement and growth.
- It should also be participatory, where both managers and direct reports are involved in all stages of decision making relative to assessment and development.
- Employee development needs to be self-directed. Employees need to assume primary responsibility for managing their own growth, learning and development.
- Coaching also needs to be future-oriented, focusing on future performance, not on past mistakes.

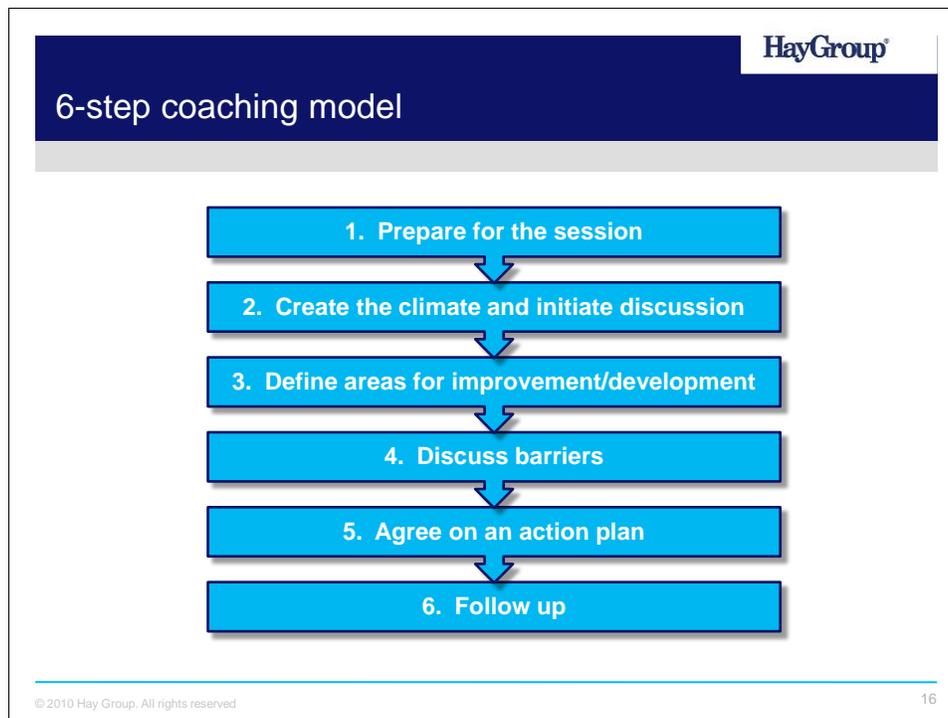
**Purpose of the coaching for competencies discussion**

- Gain a clear picture of the person's strengths and development opportunities – employee and manager must reach agreement on these
- Identify a maximum of two to three competencies for development
- Prepare a development plan for the employee with your support

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### **SHOW OH15 (Purpose of the coaching for competencies discussion)**

- We've talked about the importance of coaching and the keys to effective coaching. We're now going to focus on the coaching for competencies discussion.
- To be an effective coach, you must be able to get a clear picture of your direct report's strengths and areas for development. The CAQ you complete for your direct report, and the direct report's CAQ self-assessment, and the shared discussion to come to agreement with the employee, will help you identify this information.
- You must also successfully establish an effective and ongoing coaching process, which will allow you to give regular and ongoing feedback to your direct report.



## SHOW OH16 (6-Step coaching model)

- The purpose of coaching is to help everyone develop and become the best they can be. Let's look at a coaching model that you can use in your competency discussions with direct reports.
- **Step 1:** To prepare for the discussion, you and your direct report will need to:
  - Independently assess the employee's performance and identify areas of strength and areas for development
  - Review the employee's performance and progress against his/her plan for development (if one is already in place; if not, this is the time to start thinking about what will go into a development plan for the individual)
  - Gather and document examples of behaviours to support the progress
- **Step 2:** The coaching discussion is a shared process, a mutual exchange, and one in which the employee must actively participate and even lead. Your role as manager/leader is to:
  - Ensure privacy and confidentiality
  - Ensure there are no interruptions
  - Maintain a constructive tone
  - Guide the discussion without taking it over
  - Discuss the assessment of competencies, using the completed CAQ assessment as a framework to guide the discussion

## COACHING FOR COMPETENCIES, CONTINUED

Timing: 20 minutes  
1:25 – 1:45

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- **Step 3:** At this step of the discussion, you and the employee will:
  - Jointly determine priorities for development based on your discussion in step 2 (the employee's overall core competency strengths and areas for development)
- **Step 4:** At this stage, you and the employee should discuss possible challenges to completing specific development activities.
- **Step 5:** Based on the competencies agreed on for development, you and the employee need to agree on and finalize a plan to develop the competencies, including activities, time frames, support required (if any). Once the final plan is in place, it is up to the employee to follow through on the plan.
- **Step 6:** The final step of the coaching discussion is to schedule a follow-up meeting to review the employee's progress on his/her development plan.

### **Summarize:**

- Both employees and coaches have a role in this process. You need to remember, however, that not all employees will be ready to assume this role and will guidance and/or encouragement. Your role will be to create an environment in which the employee will be encouraged to take ownership for their own development.

**Effective coaching behaviours**

- Ask probing questions to help others reflect on their thinking, experiences, to clarify information, etc.
- Actively listen – paraphrase, summarize, reflect back others' feelings, concerns, emotions
- Help others clarify their career goals/aspirations
- Encourage others to consider new approaches
- Tailor your approach to the individual

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### SHOW OH17 (Effective coaching behaviours)

#### Review effective coaching behaviours:

- During the discussion, keep the following key coaching behaviours in mind:
  - Ask probing questions to help the other person reflect on their thinking, experiences, to clarify information, etc.
  - Actively listen - paraphrase, summarize, reflect back the other person's feelings, concerns, emotions
  - Help employees clarify their career goals/aspirations
  - Encourage employees to consider new approaches when a particular approach is not working for them
  - Tailor your approach to the individual – a one-size-fits-all approach does not work – you will have to tailor your coaching approach to fit the individual needs of each of your direct reports and the particular situation.



### Tips when meeting with the employee

- Don't expect it to be easy the first time
- Expect questions or disagreement with some of the assessments; however, most discussions will not be contentious
- Help the employee recognize that the value of the assessment lies in improving self-awareness and engaging in developmental activities
- Use supporting evidence
- Have some of your own development ideas in mind – offer alternatives and leave choices (e.g., developmental activities)

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### SHOW OH18 (Tips when meeting with the employee)

Review the tips for holding the coaching for competencies discussion:

- Here are some tips to keep in mind when holding a coaching for competencies discussion, particularly for your first few discussions:
  - Don't expect it to be easy the first time – it takes practice
  - Expect questions or disagreement with some of the assessments; however, most discussions will not be contentious
  - Help the employee recognize that the value of the assessment lies in improving self-awareness and engaging in developmental activities
  - Use supporting evidence – note your examples to support your competency ratings so that you can share these with your direct report when discussion areas of disagreement
  - Have some of your own development ideas in mind – offer alternatives and leave choices (e.g. developmental activities)

**BREAK**  
**(15 minutes: 1:45 – 2:00)**

## ACTIVITY: COMPETENCY DISCUSSION CHALLENGES

Timing: 30 minutes  
2:00 – 2:30

Activity: Competency discussion challenges

1. Individually, list the challenges you anticipate in holding discussions with your employees about their competencies.
2. In your small group, take turns sharing your coaching challenges with one another and flipchart. Note any key themes surfacing from the discussion.
3. Discuss tips for resolving each challenge.
4. Be prepared to share your challenges and ideas for resolution with the large group.

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### SHOW OH19 (Competency discussion challenges)

**Introduce** an activity in which participants will have an opportunity to discuss challenges they anticipate in holding the coaching for competencies discussion with direct reports:

- Now that we have explored what coaching for competencies involves and what effective coaching looks like; we're now going to discuss some of the challenges you anticipate in holding a coaching for competency discussion.

**Refer** participants to the Competency Discussion Challenges worksheet in their participant guide.

Divide participants into small groups and task them to do the following:

1. Individually, list the challenges you anticipate in holding discussions with your employees about their competencies.
2. In your group, take turns sharing your coaching challenges with one another and flipchart. Note any key themes surfacing from the discussion.
3. Discuss tips for resolving each challenge.
4. Be prepared to share your challenges and ideas for resolution with the large group.

### Debrief:

Ask each group to report out their coaching challenges. Capture and discuss themes with the group.



**SHOW OH20 (Development planning)**

**Explain** that the objectives for this section are to review the principles and stages of competency development as well as provide some information about effective development plans.



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### Principles of competency development

A person must have:

- A reason to change
- Data about self
- A personal development plan
- Time and practice
- Ongoing support from manager

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### SHOW OH21 (Principles of competency development)

**Review** the principles of competency assessment:

- There are certain factors that cause a person to want to develop personally and to put their development plans into action. A person must have:
  - A reason to change
  - Data about self
  - A personal development plan
  - Time and practice
  - Ongoing support from manager



### Good development plans are...

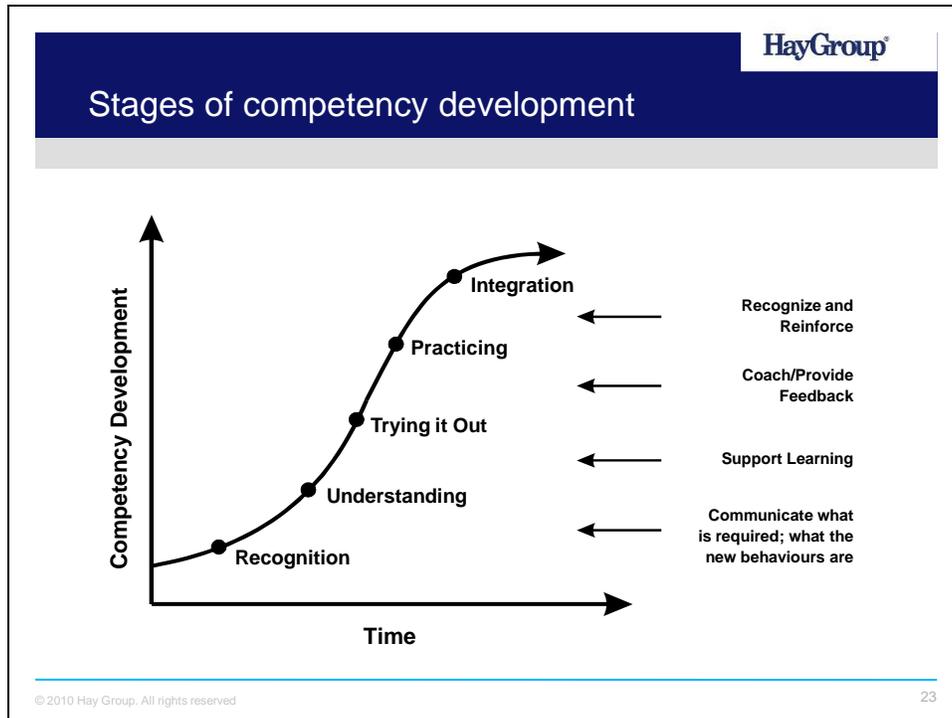
- Jointly developed by the manager and direct report
- Include, where possible, on-the-job experiences that provide real-life experience as this is where the greatest learning typically takes place
- Specific, detailing support required, if any, and target completion dates
- Focused, selecting no more than 2-3 competencies for development, and approximately development activities for each competency
- Implemented by the employee with regular follow-up discussions between the manager and employee to discuss progress

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### SHOW OH22 (Good development plans are...)

**Provide** participants with some key tips to keep in mind when it comes time to creating a development plan with their direct reports:

- Effective development plans are developed jointly by you and your direct report.
- They should include, where possible, on-the-job experiences that provide real-life experiences, as this is where the greatest learning typically takes place.
- They should outline the specifics, including detailing the support required, if any, and target completion dates.
- Development plans should be focused. One to three development activities should be identified for no more than 2-3 areas of development.
- Remember to follow up with the direct report on a regular basis regarding his/her progress with respect to their development.



### SHOW OH23 (Stages of competency development)

**Explain** the stages of competency development:

- This slide shows the stages of competency development, and the actions a manager should take to support their direct reports at each stage of competency development.
- The first stage is recognition, followed by understanding. To move from recognition to understanding, as the manager, you should communicate what is required, including what the new behaviours are.
- The next stage is trying it out. At this stage, your role is to support the individual's learning in a non-critical setting where mistakes are viewed as learning opportunities.
- The next stage is the practicing stage. This is where you should be coaching and providing feedback to the employee.
- At the final stage – Integration – your role is to recognize and reinforce demonstration of the desired behaviours.
- Today's workshop is really focused on getting you past the first stage: recognition.

## PREPARING FOR A “COACHING FOR COMPETENCIES” DISCUSSION

Timing: 35 minutes  
2:45 – 3:20

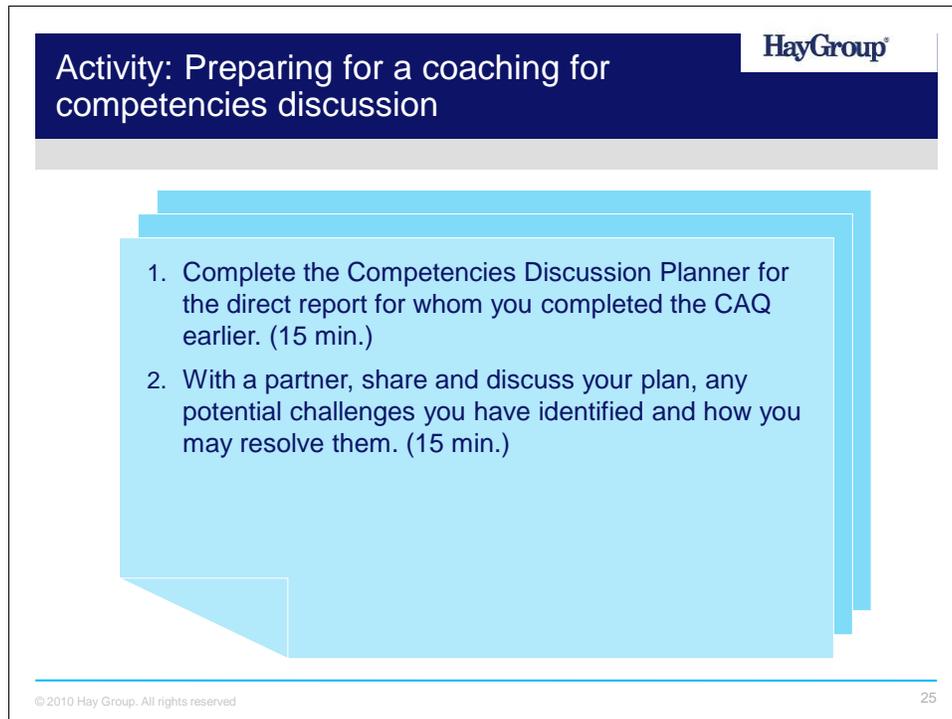


### **SHOW OH24 (Preparing for a “coaching for competencies: discussion)**

**Explain** that the objectives for this section are to prepare for a coaching for competencies discussion with a direct report by completing the Competencies Discussion Planner and using the Development Resource Guide to identify potential development ideas and activities.

## PREPARING FOR A COACHING FOR COMPETENCIES DISCUSSION

Timing: 35 minutes  
2:45 – 3:20



Activity: Preparing for a coaching for competencies discussion

1. Complete the Competencies Discussion Planner for the direct report for whom you completed the CAQ earlier. (15 min.)
2. With a partner, share and discuss your plan, any potential challenges you have identified and how you may resolve them. (15 min.)

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### SHOW OH25 (Preparing for a coaching for competencies)

**Review** with participants the instructions for preparing for a coaching for competencies discussion with a direct report:

**Refer** participants to the Competencies Discussion Planner – Manager Version in their participant binder. Let them know there is also an employee version to be completed by their direct report in preparation for the discussion.

1. Complete the Competencies Discussion Planner for the direct report for whom you completed the CAQ earlier. (15 min.)
2. With a partner, share and discuss your plan and any potential challenges you identified. (15 min.)

**Debrief:**

**Q Did you find the Competencies Discussion Planner helpful?**

Solicit responses.

**Q Would anyone like to volunteer to share any of their coaching situations/plans?**

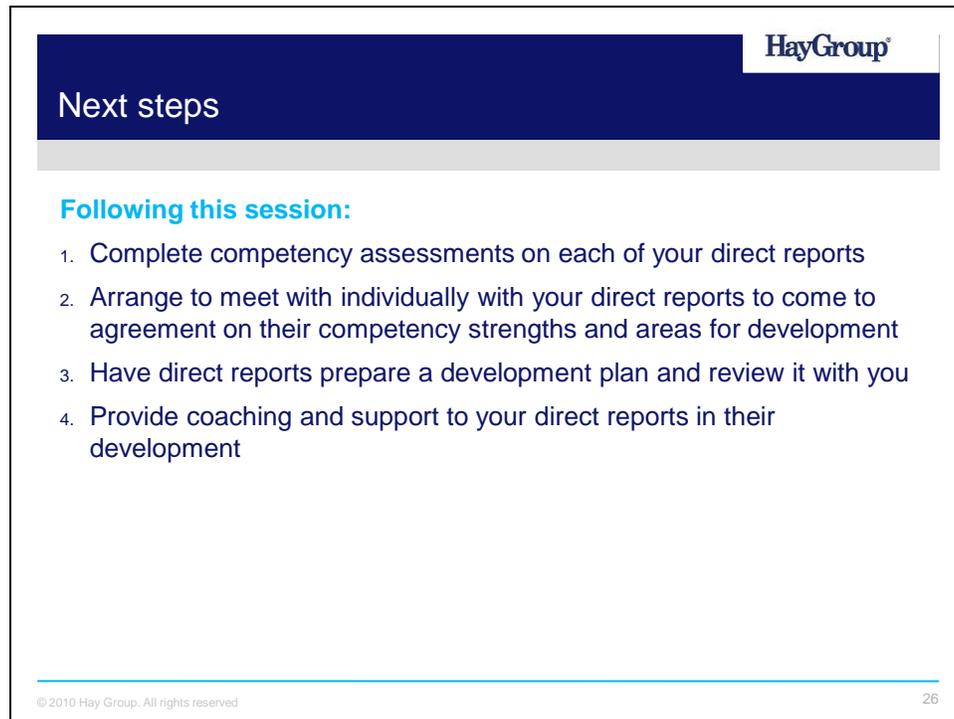
Solicit responses.

**Q What are some of the potential challenges? How will you resolve them?**

Solicit responses.

## SUMMARY, WRAP-UP, AND ADJOURN

Timing: 10 minutes  
3:20 – 3:30



The slide features a dark blue header with the HayGroup logo in the top right corner. Below the header, the title 'Next steps' is displayed in white. The main content area is white and contains a blue heading 'Following this session:' followed by a numbered list of four items. At the bottom left, there is a small copyright notice, and at the bottom right, the number '26' is visible.

**Next steps**

**Following this session:**

1. Complete competency assessments on each of your direct reports
2. Arrange to meet with individually with your direct reports to come to agreement on their competency strengths and areas for development
3. Have direct reports prepare a development plan and review it with you
4. Provide coaching and support to your direct reports in their development

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### SHOW OH26 (Next steps)

**Review** the next steps in the roll-out of competencies:

1. Following this session, you will need to complete a competency assessment for each of your direct reports. Each direct report will also complete a self-assessment (using the CAQ).
2. You will then need to arrange a time to meet individually with each direct report to discuss the results of the assessment and come to agreement on his/her competency strengths and areas for development.
3. The direct report will then need to prepare a plan to develop their competencies, focusing on a maximum of 2-3 competencies, and then review their plan with you.
4. With a plan in place, your role is to provide ongoing coaching and support to direct reports.

**Tools for holding the coaching for competencies discussion and development planning**

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- **Competencies Discussion Planner**
  - There is an employee and a manager version – ensure you provide your employees with the employee version to help them prepare for the competencies discussion with you around their competency strengths and areas for development
  - The employee version includes a template to prepare a development plan
- **Development Resource Guide**
  - A compendium of development activities, books and videos to support you in your development planning, organized by competency

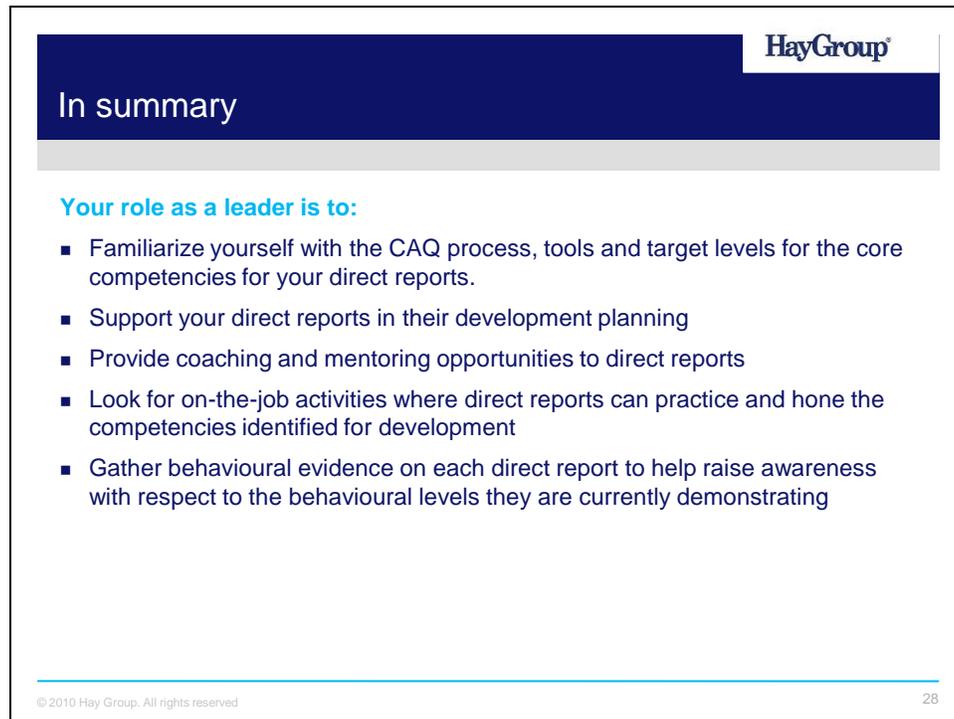
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### SHOW OH27 (Tools for holding the coaching for competencies discussion and development planning)

- Two tools have been developed to support you and your employees in preparing for the competencies discussion and preparing a development plan:
  - You're already familiar with the first tool – the **Competencies Discussion Planner**. As mentioned, provide the employee version of this tool to your direct reports to help them prepare for the competencies discussion with you. In addition, the employee version includes a development plan template to document their development plan.
  - The second tool – the **Core Competency Development Resource Guide** (or DRG) is a resource of developmental advice that includes, for each core competency, a list of:
    - On-the-job development activities/tips
    - Books/readings
    - DVDs/movies to watch
- The DRG is a valuable resource to support you and your employees in development planning. Note, however, that you and your direct reports may come up with other development activities, so do not feel like you have to limit yourself to what is in the DRG.

## SUMMARY, WRAP-UP, AND ADJOURN, CONTINUED

Timing: 10 minutes  
3:20 – 3:30



The slide features a dark blue header with the text 'In summary' in white. The HayGroup logo is positioned in the top right corner. Below the header, the text 'Your role as a leader is to:' is followed by a bulleted list of five items. At the bottom left, there is a small copyright notice, and at the bottom right, the number '28' is displayed.

**In summary**

**Your role as a leader is to:**

- Familiarize yourself with the CAQ process, tools and target levels for the core competencies for your direct reports.
- Support your direct reports in their development planning
- Provide coaching and mentoring opportunities to direct reports
- Look for on-the-job activities where direct reports can practice and hone the competencies identified for development
- Gather behavioural evidence on each direct report to help raise awareness with respect to the behavioural levels they are currently demonstrating

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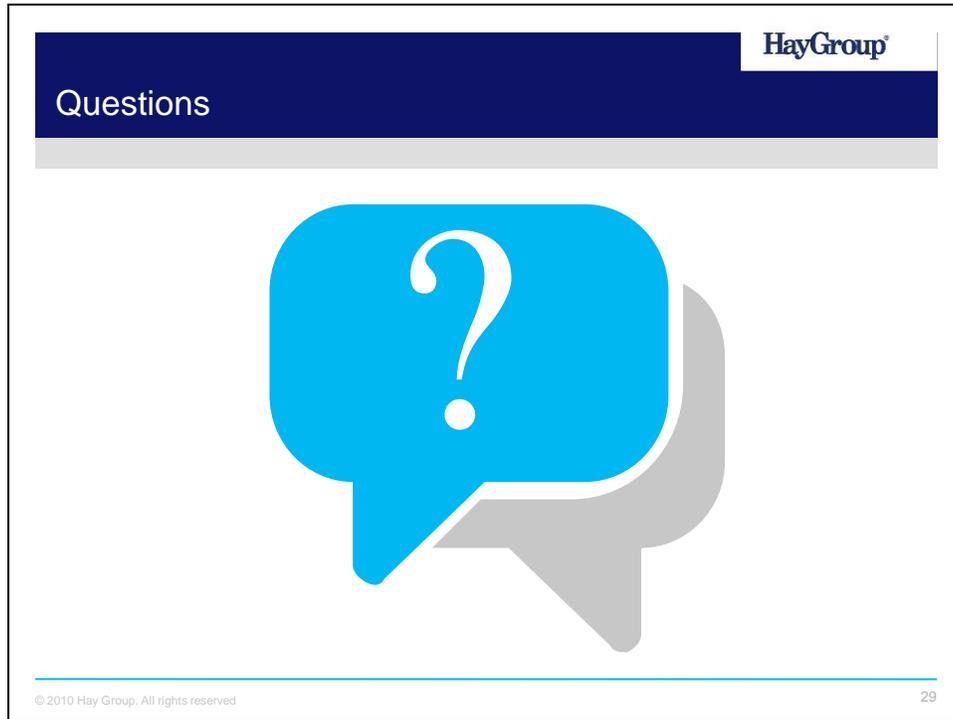
### SHOW OH28 (In Summary)

**Conclude** the session by summarizing/highlighting the manager's/leader's roles and responsibilities relative to coaching for competencies:

- Familiarize yourselves with the new CAQ process and tools
- Support your direct reports in the development planning processes
- Provide coaching and mentoring opportunities to direct reports
- Align coaching behaviours with real-life, on-the-job activities
- Document behavioural evidence for each direct report to help develop their awareness with respect to the current competency levels they are demonstrating.

## SUMMARY, WRAP-UP, AND ADJOURN, CONTINUED

Timing: 10 minutes  
3:20 – 3:30



**SHOW OH29 (?)**

**Q Does anyone have any questions?**

**Answer** any questions participants may have.

**Thank** everyone for their participation and hard work.

**Hand out** a workshop evaluation and ask participants to complete the evaluation prior to leaving.