

COMPETENCIES DISCUSSION PLANNER: MANAGER

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HayGroup

INTRODUCTION TO COACHING FOR COMPETENCIES

Purpose The Competency Discussion Planner will help you to prepare for a discussion with an employee in which you will:

- Come to agreement on the ratings for each core competency
- Identify key strengths and areas for development
- Help the employee begin preparing a plan to develop the employee's competencies

Keys to effective coaching Effective coaching is:

- **Positive and constructive**, to support continuous improvement and growth
- **Participatory** -- employees are involved in all stages of assessment and development planning
- **Self-directed** -- employees assumes primary responsibility for managing their own development
- **Future-oriented** – coaching focuses on future performance, not on past mistakes

Manager's role and responsibilities As a manager, you play a key role as a coach to *support your employees in developing their competencies to help them succeed in their role.*

This involves:

- Demonstrating an interest in, and sharing accountability for, the employee's development
- Providing timely coaching and noting behavioural examples for more formal coaching sessions
- Showing respect and empathy
- Helping the employee gain clarity around his/her role, goals and aspirations
- Monitoring and following up on the employee's progress
- Facilitating coaching discussions (not dominating them)
- Providing encouragement and support for the employee's ongoing development

Employee's role and responsibilities The employee's role is to take primary responsibility for his/her own development.

This involves:

- Soliciting and being open to feedback
- Setting realistic development goals
- Identifying development activities and opportunities, with your input and support
- Identifying challenges to completing development activities
- Following up with you on their progress

COACHING FOR COMPETENCIES – THE PROCESS

Overview of the 6-step coaching for competencies model

Having a process in place to guide your coaching for competencies discussions will help to ensure that:

- The discussion progresses in a logical and focused manner, and
- Both you and the employees know where the discussion is going and what you are trying to accomplish.

The following table outlines the key steps in holding the coaching for competency discussion:

Step	Action
1	Prepare for the session.
2	Create the climate and initiate discussion.
3	Identify areas of strength and opportunities for development.
4	Discuss barriers/challenges.
5	Agree on a development plan.
6	Follow up.

A detailed discussion of each step follows.

Step 1: Prepare for the session

Before the holding the competency discussion, both you and the employee should:

- Independently assess the employee's performance relative to the competencies – using the Competencies Assessment Questionnaire (CAQ) – to identify the employee's:
 - Areas of strength
 - Opportunities for development
 - Gather and note examples of behaviours relative to the employee's competencies to support your assessment and to share with the employee during the discussion
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Step 2: Create the climate and initiate discussion

When the coaching session begins, **create a comfortable climate** to ensure the employee is relaxed and understands the objective of the session, and then initiate the discussion.

To create the climate:

- Ensure the discussion is private and confidential, with no telephone calls or interruptions
- Express support and interest in the employee's development
- Guide the discussion (without dominating it) by asking questions to help the employee assess his/her performance. Coaching is a shared process where the employee is expected to take an active role in identifying competencies to develop and finding solutions; the employee leads, the coach supports

Initiate the discussion using the assessment data as a basis. Where the employee has made progress toward achieving his/her goals, recognize this success to reinforce desired behaviours, help maintain motivation and contribute to job satisfaction.

COACHING FOR COMPETENCIES – THE PROCESS, CONTINUED

Step 3: Identify areas of strength and opportunities for development

The key focus of the session is to identify and agree on the employee's areas of strength and opportunities for development. In identifying areas for development:

- Jointly determine development priorities
 - Agree on 2-3 competencies for development
 - Establish the goal or target level for performance
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Step 4: Discuss barriers/challenges

At this stage, you and the employee should jointly discuss possible challenges to reaching targeted competency level(s). When discussing these challenges:

- Listen actively, which involves restating, in your own words, what the employee is saying, and summarizing key points
 - Probe for details
 - Offer your insights
 - Check for agreement
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Step 5: Agree on a development plan

Once you have come to agreement on areas for development, you and the employee need to discuss development activities and agree on a plan to develop the identified competencies.

Ask the employee the following types of questions:

- What ideas do you have for developing these competencies? (The employee may want to refer to the Core Competency Development Resource Guide (DRG) for ideas to develop the identified competencies.)
- What specific actions will you take?
- What support/assistance do you need from me?
- How will you address the challenges we discussed?
- What is a realistic time frame for completing these development activities?

Then, have the employee prepare his/her development plan based on your discussion.

Step 6: Follow up

At the end of the coaching for competencies discussion, schedule a follow-up meeting to review the employee's progress.

At this meeting:

- The employee's role is to share his/her progress with regard to the development plan and identify any challenges or difficulties he/she may be having
 - Your role, as coach, is to recognize successes where the employee has made progress, and to assist with problem solving and provide additional help and support as required
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COMPETENCIES DISCUSSION PLANNER: MANAGER

Employee's Name:		Date:
Step 1: Prepare for the Session		
<input type="checkbox"/> Schedule an appointment for a competencies coaching session with the employee <input type="checkbox"/> Ask the employee to complete Step 1 of the Competencies Discussion Planner: Employee <input type="checkbox"/> Complete an assessment of the employee's competencies to identify the employee's strengths and development opportunities		
Areas of strength:	Behavioural examples (supporting evidence):	
Areas for development/possible coaching needs:	Behavioural examples (supporting evidence):	
Potential development activities:		

COMPETENCIES DISCUSSION PLANNER: MANAGER, CONTINUED

Step 2: Create the Climate and Initiate the Discussion	
<input type="checkbox"/> Private and confidential <input type="checkbox"/> No interruptions <input type="checkbox"/> Guide the discussion (don't dominate it)	<input type="checkbox"/> Maintain a helpful/constructive tone <input type="checkbox"/> Shared process <input type="checkbox"/> Discuss competencies using the CAQ as a basis
<p>Probe for behavioural examples by asking questions such as: Which competencies did you identify as your key strengths? Which competencies do you see as potential areas for development?</p> <p>Have the employee describe areas for development/possible coaching from his/her perspective. Record areas of agreement and disagreement and discuss them. You will need to draw upon the behavioural examples you noted on the previous page, and have the employee share his/her examples where your assessments differ.</p>	
Step 3: Identify Areas of Strength and Opportunities for Development	
<input type="checkbox"/> Agree on areas of strength <input type="checkbox"/> Jointly determine development priorities <input type="checkbox"/> Identify 2-3 competencies for development	<input type="checkbox"/> Establish the goal or target level for performance <input type="checkbox"/> Remember, it is a shared process <input type="checkbox"/> Check for agreement and understanding
<p>Ask: Which of the areas we discussed do you feel you would work on and why?</p>	<p>Ask: What is your goal in this area?</p>

