From the Annual Review to a Coaching Culture

Why?

Incorporating Goals

Developing the Process

Survey Says
Why?
Why would I want to put our organization through such a major change?

• **Gallup, March 2018, “The Most Expensive Mistake Leaders Can Make”**
  • Only 14% of Employees Strongly Agree that Performance Reviews Inspire Them
  • Gallup analytics suggest that leaders who want to develop their managers into successful leaders must focus on all 3 of the following:
    • Establishing Expectations
    • Continually Coaching
    • Creating Accountability

• **What Do You Think Are Reasons for Making this Change?**
The Most Expensive Mistake Leaders Can Make

by Simon Cooper and Jim Harter

STORY HIGHLIGHTS

- Current performance review processes often hurt organizations
- Today's top talent does not want a boss, they want a coach
- Managers should establish expectations, coach and create accountability
A Coaching Culture is Present When:

• All members of the culture fearlessly engage in candid, respectful coaching conversations, unrestricted by reporting relationships, about how they can improve their working relationships and individual and collective work performance.

• All have learned to value and effectively use feedback as a powerful learning tool to produce personal and professional development, high-trust working relationships, continually-improving job performance, and ever-increasing satisfaction.”
How Do We Know if We Have One?

• Leaders are Positive Role Models
• Every Member is Focused on Feedback
• Learning Occurs, More Effective Decisions are Made & Change Moves Faster
• HR Systems are Aligned and Fully Integrated
• The Organization Has a Common Coaching Practice and Language
• Coaching Flows in All Directions (Up, Down, Laterally)
• Teams Become Passionate and Energized
Organizational Shifts When We Focus on Learning Together—Coaching

FROM
• Focus on Problems
• Build on Individual Weaknesses
• Hiding from Mistakes & Failure
• Look for “What Was”
• Being Given “The” Answer
• Directive or Closed Questions
• Competition

TO
• Focus on Solutions
• Build on Collective Strengths
• Learning from Failure & Success
• Look for “What Can Be”
• Finding Answers Together
• Open-Ended Questions
• Collaboration
How to Start A Cultural Transformation

- Set Goals Tied to Strategic Plan
- Train Managers How to Coach
- Coach & Monitor
- Consider Coaching Results When Evaluating Pay
Identify “Big Rocks” to Establish Priorities

What are your ‘big rock’ priorities? What do you put under the category of important, not just urgent? Top professionals pay attention to those activities that have the greatest potential for payoff. They pay attention to their big rocks. –Jeff Shore
Be an HR Business Partner to Help Identify “Big Rocks”

• “…The role of the Business Partner is to turn strategy into action—to make it happen in reality.”
  –From “HR—The Business Partner, Shaping a New Direction” by Barbara Kenton and Jane Yarnall

• How can you help “turn strategy into action” in your organization?
• What do you think the “Big Rocks” are in your organization?
“Big Rock” Examples

1. **Financial/Budget**
   - Meet or Exceed
   - Proactively Monitor & Adjust

2. **Member Engagement/Customer Service**
   - Increase engagement through service, enhanced value, communication, touch points

3. **Programming**
   - Evaluate market
   - Grow revenue & participation through new and improved programs
We Know What our Big Rocks Are...Now What?

- **Facilitate goals-setting session with managers** to help them write SMART goals specific to their department that tie back to the “Big Rocks.”
- **Help them facilitate a conversation with their staff teams** to identify ways all employees can have an impact on goals. This helps all employees understand how they impact the organization’s strategic plan!
- **Managers report what was identified** during department meetings and create a visual reminder of department goals in their work area.
- **To assure high performance, follow up with individuals** about goals during 1 on 1 coaching sessions and as a group during regular staff meetings.
- **Let’s Walk Through an Example of How the Whole Goals-Setting Process Works....**
Train Managers How to Coach

• **Provide training for managers who supervise staff:**
  
  • 6 Components of Leadership Developmental Coaching Process
  • How to Ask Open-Ended Questions
  • Difference Between Disciplinary Action & Coaching
  • How to Use Coaching Form
    • 15-20 minute sessions
    • “On-the-Fly”, 2-way conversation
  • Establish Coaching Frequency & Rating Guidelines
LEADERSHIP DEVELOPMENTAL COACHING PROCESS

EXPLORE PURPOSE

EXPLORE CURRENT SITUATION

EXPLORE ALTERNATIVE

PLAN

ACT

SUSTAIN

Leading and Coaching Others - Module 3

Participant Guide

©2013 YMCA of the USA, All Rights Reserved
Open-Ended Coaching Questions

• What does it look like when you are doing your job well?
• What has been your biggest contribution to your department?
• What ideas do you have to improve work in your department?
• What is the key behavior or competency you need to develop?
• What is the desired outcome?
• Give an example of how you engaged a customer...
• What are your long-term career goals?
• What are your current “success detractors” at work or personally?
• How can I help you be at your best?
Coaching is NOT Disciplinary Action

**COACH**
- To Develop
- Proactive, Not Reactive
- 2-Way Conversation
- On-Going
- Listen More Than You Talk

**DISCIPLINARY ACTION**
- To Correct & Document
- Reactive, Not Proactive
- 1-Sided, Led by Manager
- Progressive (Verbal, Written, Suspension/Termination)
- Talk More Than You Listen

Tip: Create **separate** tools for managers to use for coaching, verbal counseling and disciplinary action.
Develop a Coaching Form that Takes Out the “Guess Work”

- 1-on-1 Coaching Form Sections:
  - Competences & Behaviors
    - Relationships, Communication, Functional Expertise, Accountability, Innovation... Excel or Improve?
  - Contribution
    - What does it look like when you’re doing your job well?
  - Goals Check-In
    - How’s it going with making progress on our department goals?
  - Career Advancement
    - What are your long-term career goals?
    - How can I help? Who can assist you?

What behaviors do you need to measure? *Think about your “Big Rocks” and Mission, Vision & Values.*
Survey Says...

What is going well with the new coaching process?

• Great process overall, and the staff get the opportunity to "toot their own horn!"

• What I feel is going well with the coaching process is that it sets a positive tone. Sometimes as supervisors we focus on problems we have to solve rather than on all the things that are going right. Having this opportunity to reflect on each person and praise them for their important contribution creates a open and positive culture.
Survey Says…

What you feel we can do to improve the process?

• *The only problem with the Department Goal Questions are that they relate back to when we made the goals as a group. With our turnover, a lot of the staff were not even here when we all made the goals, and went through the steps together. (But I’m glad the questions are there to remind the new staff what our goals are.)*

• *I think we could improve the process by tailoring the coaching form to be specific to department. I love the idea of promoting engagement, the questions could just be more department specific.*
Survey Says...

If you prefer the goals setting and coaching method over the annual review method and why?

• I prefer goals setting and coaching over annual review because it sets aside time regularly for me to have conversations with staff I might not otherwise have. I am able to learn about their long term goals and potentially retain staff because I am able to help support them in reaching those goals within the Y as opposed to them leaving to pursue goals outside the organization.
How to Start A Cultural Transformation

Set Goals Tied to Strategic Plan

Train Managers How to Coach

Coach & Monitor

Consider Coaching Results When Evaluating Pay
Questions?

THANK YOU!
Raquel Nachatilo
Missouri Valley Family YMCA
Human Resources Director
raquel.nachatilo@bismarckymca.org
linkedin.com/in/raquel-nachatilo-
33066111