PERFORMANCE COACHING WORKSHEET

For: ______________________________ **By:** ____________________ **Date:** ___________

TOPIC/ISSUE	F/U?	EMPLOYEE COMMENTS	SUGGESTION(S)/ SOLUTION(S)/ACTION	√	F/U DATE/TIME

HOW TO USE THE COACHING WORKSHEET

Purpose — To plan and follow up on a staff matter where action for change is required. The context could be a status meeting, regularly scheduled one-on-one discussion, coaching session, problem-solving session, or more urgent performance issue.

Topic/Issue—List the topics or issues you want to discuss with the individual in this first column, e.g., “Improve project planning,” “budget memos,” “personnel issues,” “meeting deadlines,” a new job expectation, or other issues that need to be addressed — whether for coaching or improvement. The individual may also want to raise a topic/issue for you to respond to where s/he has a question, needs help, wants to try something, etc.

F/U—This stands for “follow-up.” If the topic is a follow-up to a previous discussion or discussions, put the date of the last meeting or discussion on the topic into this column. It then serves as a reference back to a previous worksheet or other notes you may have filed. If the topic was discussed on more than one occasion, enter all the relevant dates here. *This is a key data item when tracking discussions of performance issues which if not corrected may lead to suspension or termination*. If there is a performance issue, clearly describe the issue as well as consequences if not improved.

Staff Comments—This column is for noting the reasons, explanations or concerns given by the individual whether in response to your specific feedback (e.g., an explanation) or to a request or announcement of change (e.g., a concern). Capturing this information in writing documents the individual’s point of view and demonstrates that it matters to you.

Suggestion(s)/Solution/Action—This column records suggestions, ideas, possible solutions and/or needed action(s) to resolve a problem or issue. Seek and record the individual’s ideas and solutions before offering your own suggestions. Focusing on the individual’s ideas for solving the problem or resolving an issue makes it clear that s/he is responsible and makes it more likely that s/he will take ownership of the solution.

√—A check mark signals buy-in by both parties on whatever solution/action is agreed upon. The column is present as a reminder to the manager to ASK for the individual’s agreement/commitment.

F/U Date/Time— This follow-up date and time will remind you to plan for the next coaching session, identifies issues that need to be followed-up on at the next meeting (monitored), and signals closure when the item is resolved. Every topic on the worksheet should have a specific agreed-upon date/time for follow up. Use this space also to note when the item has been brought to satisfactory closure—e.g., when a one-time problem has been solved, a task was completed, information was communicated that needed to be communicated, or some other completion was achieved.

The completed worksheet from the previous session serves as a source document for planning the next session. As information is updated, followed up on, and reviewed from meeting to meeting, the worksheets also serve as shared references to use during subsequent discussion(s).