**COACHING OR COUNSELLING CHECKLIST**

Before conducting either type of session, answer all of the questions below about the employee and the situation. Doing so will help you focus on whether you need to counsel or coach.

**What is Counselling?**

Employee counselling is defined as a process which is initiated by the responsible manager for providing assistance to employees facing problems. It is conducted to listen, understand problems, and provide guidance, advice and suggest ways to solve them. It is mainly to provide job related, personal and confidential help to those who are facing the problems.

**What is Coaching?**

Workplace coaching is a professional helping relationship, focused on the goals of the employee. It is based on reciprocal actions between the two parties. Information passes two ways: the manager responds to information about the employee’s needs, while the employee receives help, in the form of active listening, thoughtful questioning, or concrete guidance, from the manager.

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| --- | --- | --- | --- | --- |
| **Question** | **Yes** | | **No** | |
| Does the employee know what is supposed to be done and when? |  | |  | |
| Have I defined the job description and skills required to do the job? | |  | |  |
| Does the employee have the skills required to do the job? | |  | |  |
| Has the employee been trained sufficiently in the organizational culture and skills needed to do the job? | |  | |  |
| Do I have the time it will take to sufficiently train and orient this person? | |  | |  |
| Have I adequately defined the ongoing job performance expectations for the employee? | |  | |  |
| If no, can anyone do the job? Is the standard realistic? | |  | |  |
| If no, can I revise the standards? | |  | |  |
| What is the specific difference between the present performance level and the desired performance level? | |  | |  |
| Is the difference important? | |  | |  |
| Define the impact the performance problem has on:  You: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  The Unit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  The Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  The Customer/Client: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  | |  |
| Does the employee want the job? | |  | |  |
| Does the employee have the adequate resources to do the job? | |  | |  |
| If no, what specifically does the employee need? | |  | |  |
| Are obstacles beyond the employee’s control affecting performance? If yes, what specific obstacles? | |  | |  |
| Has the employee raised obstacles? | |  | |  |
| If so, what? | |  | |  |
| Can these obstacles be removed? | |  | |  |
| If yes, what does the employee need from me during this time to help meet minimal performance standards? | |  | |  |
| Are consequences positive for positive performance? | |  | |  |
| Have I been giving high-quality feedback? | |  | |  |
| If no, how can I improve? | |  | |  |
| Have I given immediate reinforcement for improvement? | |  | |  |
| Have I been inadvertently rewarding poor performance by ignoring it rather than coaching to correct it? | |  | |  |
| Does the employee trust me and feel I am here to help him/her be successful in this job? | |  | |  |
| If no, what specifically can I do to build the trust? | |  | |  |
| Do I plan to develop the employee’s skill or motivation? | |  | |  |
| If yes, describe the plan in detail below: | |  | |  |
| If no, develop a plan before conducting a session. Then, during your session, be sure to solicit the employee’s ideas first before adding your own. Seriously consider the employee’s ideas and try to develop a plan that blends your ideas with his or hers. | |  | |  |

**COACHING SHEET**

Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Describe situation or concern that occurred.

Discussion with employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee's reason for situation:

Plan of action (describe any actions necessary by supervisor and/or employee):

Date to review changes or improvement: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Supervisor Signature*

*Employee Signature*