

Team Coaching eLearning Course | Learning Objectives and Assessment tasks

Area	Module	Learning objectives	Assessment tasks - Accountants
1	Core principles of effective coaching in accounting firms	<ol style="list-style-type: none"> 1. Understand the difference between teaching, coaching and mentoring 2. Identify the key attributes of great coaches in the workplace environment 3. Identify key situations where coaching can be used to improve performance 	<ol style="list-style-type: none"> 1. Identify 3 situations where you should use coaching in preference to teaching or mentoring. 2. Consider the 3 core principles of effective coaching – ask questions, ask for solutions, adapt your style. What are you good at? What could be improved? 3. Identify 3 situations where you can use your coaching skills to improve individual performance. How would you go about doing this? 4. Document up to 3 SMART actions to implement from this session
2	Coaching styles to achieve performance improvement	<ol style="list-style-type: none"> 1. Identify the key changes we're looking for in our people 2. Describe your natural coaching style and how it impacts on performance management 3. Identify how different coaching styles can be used in specific situations 	<ol style="list-style-type: none"> 1. Outline characteristics of different coaching styles. Think of individuals you know that demonstrate each of these styles. How effective are their coaching skills? 2. Identify your natural coaching style. In which situations is this an effective coaching style? In which situations is it ineffective? 3. Identify 3 specific situations in your team that require different coaching styles. Consider how you would provide coaching support in each situation. 4. Document up to 3 SMART actions to implement from this session
3	The use of active listening to drive behavioural change	<ol style="list-style-type: none"> 1. Identify the key reasons why people resist changing behaviour in the workplace. 2. Understand the key principles of active listening and why it's so important for effective coaching. 3. Outline the 9 key questions that effective coaches should ask when driving behavioural change 	<ol style="list-style-type: none"> 1. Describe some key principles of active listening and how they would apply to the coaching conversation. 2. Outline De Bono's model of coaching questions for performance improvement. In what situations could this be a useful technique? 3. Identify a real life performance issue where active listening could be helpful in achieving a result. Put together an outline of the interview process, including questions you would ask to facilitate a productive discussion. 4. Document up to 3 SMART actions to implement from this session

4	Understanding and influencing personal motivational styles	<ol style="list-style-type: none"> 1. Understand personal motivational styles and how they affect performance at work. 2. Use the Merrill-Wilson profiling template to identify the dominant personality profiles of the people in your team. 3. Identify some simple coaching strategies to guide staff to performance improvement based on their personality and motivational profile. 	<ol style="list-style-type: none"> 1. Identify your personality profile based on the Merrill-Wilson profiling template (Driver, Amiable, Influencer, Analytical). 2. Use the Merrill-Wilson profiling template to identify the dominant personality profiles of the people in your team. If you feel confident, ask team members for their own assessment and compare the results. 3. Consider how you could enhance the coaching experience with individual employees based on their personality profile. Outline your conclusions. 4. Document up to 3 SMART actions to implement from this session
5	Overcoming roadblocks and challenges when coaching	<ol style="list-style-type: none"> 1. Identify the top 5 coaching challenges and their solutions 2. Review the key steps involved in an effective coaching conversation. 3. Understand the key steps involved in managing expectations of staff 	<ol style="list-style-type: none"> 1. Identify 3 of the most common challenges you have with coaching your people. Develop and document potential solutions to these roadblocks. 2. Review the 7 step process for a coaching conversation. Develop some open questions around each part of this process. 3. Identify how you can best communicate your expectations of the people around you (if you do not have people management responsibilities, still answer this question). 4. Document up to 3 SMART actions to implement from this session
6	KPI measurement and review for behavioural change	<ol style="list-style-type: none"> 1. Understand the influence of key performance indicators on the behaviour of individuals. 2. Identify those measures of performance that best express the behaviours you would like to see in team members. 3. Develop a process to reinforce the changes you would like to see in team members through KPI review 	<ol style="list-style-type: none"> 1. Review the measures you use to monitor individual performance. How effective are they are encouraging the type of behaviour you would like to see in your people? 2. Identify the core values for your firm or your team. To what extent are those values demonstrated through day to day behaviour of team members? How could this process be improved? 3. Identify up to 5 KPIs that you believe reflect the behaviours you would like to see in your team? How could you measure these KPIS on a regular basis? 4. Document up to 3 SMART actions to implement from this session.

7	Use coaching to direct job budgets and workflow	<ol style="list-style-type: none"> 1. Understand the importance of leveraging workflow where possible. 2. Implement a step by step process for delegating the responsibility for jobs. 3. Identify key 'touch points' for providing ongoing coaching in workflow management. 	<ol style="list-style-type: none"> 1. Identify your key challenges in managing workflow and outline potential solutions incorporating delegation of specific tasks. 2. Provide training and ongoing coaching to staff in the efficient management of workflow. 3. Establish some 'touch points' to collaborate regularly on progress of projects and jobs where appropriate. 4. Document up to 3 SMART actions to implement from this session.
8	Use coaching to enhance client relationships	<ol style="list-style-type: none"> 1. Understand the value and importance of leveraging client relationship management within the business team. 2. Understand the term 'client service excellence' as it applies to accountants and advisors in public practice. 3. Implement a process for making client care a core focus for all team members. 	<ol style="list-style-type: none"> 1. What key elements of client relationship management could be more effectively delegated to the firm's people? Outline the reasons and potential actions. 2. Outline key elements of your firm's client service excellence charter. What should be included? 3. Identify all contact points with the client and allocate to relevant staff. Use this as the basis for discussion on communication standards and behavioural guidelines. 4. Document up to 3 SMART actions to implement from this session.