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| **PREPARING FOR THE FIRST MEETING** |

Good coaches come prepared. Use this worksheet in advance of your first meeting for a thoughtful and focused discussion.

## Preparing Your Employee

Set expectations.

If this is your employee’s first experience with coaching, have a brief conversation or send a short email explaining the purpose of your meeting. Make sure he understands both the **goals** and the **format** of your time together.

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| SUGGESTED SCRIPT“James, I want to let you know what to expect from our coaching session next week. The purpose of these sessions is to support your growth, not to give you directions. It’s not part of any formal review process, but it’s an informal space to set goals and solve problems together. Think of it as a dedicated half hour when I can serve as a sounding board and a resource.” |

Email the Employee Questionnaire to your employee at least 24 hours before you meet.

Giving him questions ahead of time allows him to come to the meeting prepared with thoughtful answers. Ask him to fill them out before your first meeting. The questions on this worksheet are personal, so make sure your employee understands that the sole purpose of the exercise is to help you coach him as effectively as possible.

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| SUGGESTED SCRIPT“We’ll be talking in wide-ranging detail about your work experience, and I want to give you the opportunity to reflect on that experience before we meet. This worksheet summarizes some of the topics we’ll be talking about, so please take some time to think about your answers. These questions aren’t part of a formal review process: The point is really to make this process relevant and useful for you.” |

## Preparing Yourself

THINK ABOUT WHY YOU’RE COACHING

What is your agenda for a coaching relationship? Is there a specific performance issue you want to address with this employee? An opportunity you want to prepare him for? It’s best to clarify your expectations ahead of time so that you’re ready to support the goals that you and your employee identify together in your first meeting. The more clearly you understand your own expectations, the better you will be able to align your goals for this process with his goals.

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| Reasons for Coaching |
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THINK ABOUT *WHOM* YOU’RE COACHING

The best employees add value to an organization by doing what they enjoy and what they excel at. What would peak performance look like for this person? To assess what you do know and don’t know about how he works, fill in the blank column in the following table *before* you meet with your employee.

| SKILLS | What is he good at? |  |
| --- | --- | --- |
| INTERESTS | What does he like to do? |  |
| MOTIVATION | What matters to him? What motivates him to perform? |  |
| CONTRIBUTION | How does he add value in the organization? |  |
| NETWORK | What do his work relationships look like? |  |
| GOALS | What are his long-term and short-term career goals? |  |

LOOK FOR SYNERGIES

Now consider how your goals for this employee align with what you already know about how he works.

| SKILLS | How do your goals develop what he’s good at? |  |
| --- | --- | --- |
| INTERESTS | How do they speak to what he likes to do? |  |
| MOTIVATION | How do they engage his deeper motivations? |  |
| CONTRIBUTION | How do they increase his contribution? |  |
| NETWORK | How do they enhance his work relationships? |  |
| GOALS | How do they connect to his ambitions? |  |

RECOGNIZE YOUR OWN BIASES

Your job is to help your employee become the best version of himself—not another version of you. How do your work styles differ? Can you predict from past experience where friction is most likely to develop? Take a moment to reflect on the idiosyncrasies of your work styles so that they don’t derail you later, and jot them down in the following table.

| SKILLS | How do your skills align or differ? |  |
| --- | --- | --- |
| INTERESTS | How do your interests align or differ? |  |
| MOTIVATION | How does your motivation align or differ? |  |
| CONTRIBUTION | How does your contribution to the organization align or differ? |  |
| NETWORK | How do your work networks align or differ? |  |
| GOALS | How do your professional goals align or differ? |  |

TEE UP YOUR QUESTIONS

Good coaching is about asking good questions. What do you need to learn about your employee to finalize your coaching goals? Take notes in the chart below, and check out the relevant questions in the interview you’ll be conducting with the **Employee Questionnaire.** You can also employ the general discussion questions from **Preparing for Follow-Up Meetings.**

| SKILLS | What do you want to learn about his skills? |  |
| --- | --- | --- |
| INTERESTS | What do you want to learn about his interests? |  |
| MOTIVATION | What do you want to learn about his motivation? |  |
| CONTRIBUTION | What do you want to learn about how he sees his contribution? |  |
| NETWORK | What do you want to learn about his network? |  |
| GOALS | What do you want to learn about his goals? |  |

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CLEAR YOUR DESK

Before the coaching session, wrap up your most urgent work tasks. If you’re distracted during the session, you won’t ask good questions or thoroughly process the answers. Your full engagement sends a powerful message about how seriously you take this work. You can also consult **Getting in the Coach’s Mind-Set** to help you get into the right frame of mind for coaching.