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| **EMPLOYEE QUESTIONNAIRE  (for the coach)** |

To help your employee make the most of her strengths and shore up her weaknesses, you need to get to know her as a whole person. Use this structured interview to take a comprehensive “personal history of work” during your first coaching session.

Ideally, your employee will have reflected on these questions before the session (see **Employee Questionnaire**). Before you start, help her feel comfortable and safe by reiterating the purpose of this discussion: to develop together a coaching plan tailored to her particular experiences and goals.

Use the opening script to begin the meeting, and then dive into the questionnaire. Your role here is to **listen**. Take notes in the spaces provided as you go. Ask clarifying questions if necessary, but do so in moderation, and try to frame questions so that the interview doesn’t feel like an interrogation.

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| SUGGESTED SCRIPT  “Since we are both just starting the coaching process, I want to begin by learning more about how you see your work—what you like, what you want, how you’re looking to grow.  “As you know, this isn’t part of a formal evaluation process. The point of these conversations is to create an informal space where we can set goals and problem-solve together. My aim right now is to get to know you better as an employee and a person, so that I can make this experience useful to you.  “You already looked at the questions we’re going to be talking through today when you did your coaching prep. It’s my hope that we can talk pretty frankly, and that you’ll tell me what you really think about these topics. I’m mostly going to be listening, though I’ll probably ask some clarifying questions.  “Do you have any questions for me before we start?” |

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| INTERESTS AND VALUES |
| 1. What are your professional interests and values? What types of projects do you enjoy? Are you motivated by compensation? By increased responsibility? By a sense of mission? |
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| 1. What are your lifestyle needs? For example, you might want a set work schedule, limited or no travel, and so on. |
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| SKILLS: STRENGTHS AND GAPS |
| 1. What are your top five skills (i.e., those in which you have the most proficiency and/or those you enjoy using the most)? |
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| 1. What do you believe are the top two or three skills you need to learn to grow in your job, advance to the next level, or seek a new job? |
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| 1. What are your key transferrable skills—the skills that are not just job-specific but that can be applied to work in many positions (i.e., negotiation, financial analysis, collaboration)? |
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| 1. Do you think you are currently performing up to your potential? Why or why not? |
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| JOB SATISFACTION |
| 1. What is your overall level of satisfaction with your current position? |
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| 1. What parts of your work would you like to continue doing? |
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| 1. What new work activities or positions would you like to try? |
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| CAREER GOALS AND NEXT STEPS |
| 1. How do you define success? |
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| 1. What would you like to be doing six to 12 months from now? |
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| 1. What do you need to do to get there? For example, what types of projects would you need to work on? What type of training and experience would you need? |
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| 1. What would you like to be doing three to five years from now? What is your dream job? |
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| CAREER GOALS AND NEXT STEPS |
| 1. What do you need to do to get there? For example, what types of projects would you need to work on? What type of training and experience would you need? |
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| 1. Are there any other big-picture, personal development goals that you’d like to make me aware of? |
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| 1. Do you know people inside and outside the organization who are aware of your strengths and aspirations and can help you achieve your goals? |
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