

Coaching for Talent Development and Employee Engagement

Overview:

Business success comes from engaged employees who continue to hone their skills. Managers and supervisors are instrumental to unlocking the potential of their employees and coaching is their key.

Effective managers and supervisors coach continuously; they know that coaching must be simple for it to be usable.

Entelechy's Coaching Model is simple, practical, and just one component in a blended management training program that Entelechy customizes for YOUR company.



Entelechy, Inc. "unlocking potential"
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**We make training. Great training.
Your training.**

Entelechy congratulates all 2009 Training 125 winners and thanks its clients on this year's list.

Training 125 winners know that **generic** training produces generic results. Engage employees and develop talent with Entelechy's **customized** training.

Entelechy draws from its proven modules to create truly customized blended training for YOU, embedding YOUR scenarios, policies, and practices and addressing YOUR challenges and goals. We create YOUR training and YOU own it!

Want to make the list next year? Contact Entelechy.

Call us at 800.376.8368 or email Entelechy's president, Terence Traut, at ttraut@unlockit.com to see how Entelechy's customized training can unlock the potential of your leaders and employees.



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Success is not the absence of failure; it is the achievement of objectives.
Success is getting up after the fall, learning from the mistake,
and continuing on better and faster as a result.

Doing runs the risk of failure;
not trying guarantees a legacy of nothing.

Introduction

Session Description

Developmental coaching is THE way to engage and retain talent AND develop even higher levels of performance. Mid-level and front-line managers are key to developing talent and eliciting discretionary performance from employees, and coaching is their tool. In this session you will learn what developmental coaching is and how to implement a coaching initiative in your company. Most importantly, you will learn an effective, simple coaching model that is based on High Performance Training (HPT) concepts.

As a result of participating in this session, you will be able to:

- Describe the benefits of coaching for the employee, the manager or supervisor, and the organization.
- Differentiate coaching from other types of performance management techniques including training, corrective action, counseling, and mentoring.
- Describe an effective coaching model, highlighting the key elements.
- As a group, coach the coach following the coaching model; and assess your own coaching strengths and areas for development.
- Explain how to implement a coaching initiative within your organization.

Michael, if you can't pass, you can't play.

— Coach Dean Smith to Michael Jordan
in his freshman year at UNC

Session Leader Biography



Terence Traut is the President and CEO of Entelechy, Inc., a training design and development company based in New Hampshire. Entelechy is celebrating its 16th year creating customized performance solutions for companies throughout the world. Entelechy's customizable modules have formed the basis for many successful training programs. At Entelechy, Terry is responsible for overall program design, development, and quality assurance. Terry brings over 25 years of training and management experience to Entelechy.

Before joining Entelechy, he worked for nine years at Digital Equipment Corporation and Wang Laboratories as sales training designer and manager. He also instructed for Boston University throughout Europe.

Terry has designed, developed, and delivered hundreds of courses and evaluations in the areas of management, sales, customer service, and training. He has developed training in a variety of media including web-based training, computer-based-training, self-paced instruction, and classroom training.

Terry holds a BS in Education from St. Cloud (Minnesota) University and a MS in Human Services Administration from Boston University. He has completed all coursework for EdD, Human Resource Education from Boston University.

About Entelechy

Entelechy's mission is to *help clients increase productivity, reduce costs, and win more business through business-based needs assessment, performance solution design, and quality implementation.*

We build from 40+ customizable modules in the areas of management/supervision, sales, customer service, and training to create a training program just for you — one that is guaranteed to have impact.

Check out Entelechy's website at www.unlockit.com for free training tips, inexpensive eGuides, and customizable training modules (you can purchase the same source files that Entelechy uses when it customizes training!).

Other ways to contact Entelechy:

Email: info@unlockit.com

Call: 603-424-1237

Fax: 603-424-6361



The Need for Coaching

A Budgeting Imperative

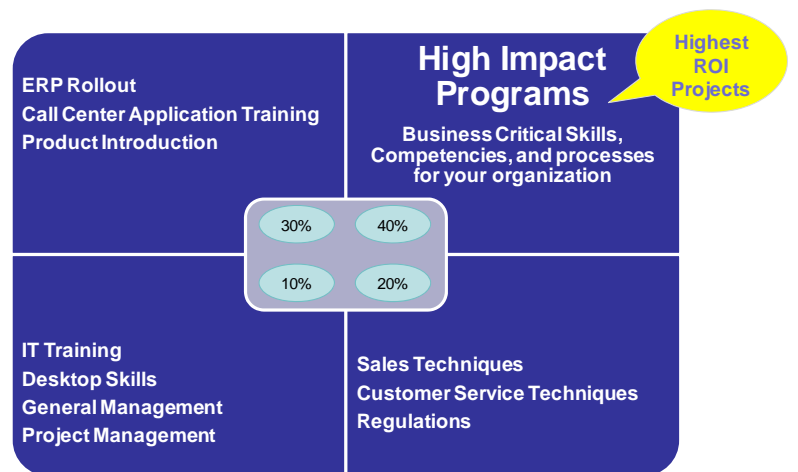
In *Training Efficiency: Optimizing Costs*, a 2008 survey referenced in the Jan 2009 issue of *HR Magazine*, 54% of trainers indicated that they were under “significant” or “intense” pressure to cut costs. Almost half had had budgets cut from the previous year. Bersin & Associates, in their report, *Enterprise Learning, Recruiting and Talent Management 2009*, state that: “Our trend research clearly shows that corporate learning is going to absorb much of the budget cuts in corporate HR. Over the last five years, L&D spending has steadily increased (since the 2000 recession). This naturally results in a proliferation of learning programs being developed and delivered by business units, sales and customer service, manufacturing locations, and corporate HR.” “Organizations,” they believe, “will focus on restructuring HR and L&D to increase efficiency and business alignment.”

Among the suggestions offered in the article comes from Tom Starr, principal at Booz & Co., is to determine what training is essential to the business. Starr suggests, “Build a taxonomy of what is critical and invest disproportionately in those areas. Be more selective in who it is you’re training. For instance, in retail banking, a pivotal role is the branch manager. You want to make sure to provide training for [pivotal employees.]”

Bersin & Associates agree, stating that organizations should invest in those training programs that are strategic AND customized for the company — programs that will give the company a unique competitive advantage.

Furthermore, companies looking to thrive in this challenging economy need to take advantage of the knowledge and relationships that currently exist on the job. “Mentoring, coaching, and shadowing will all likely become more important during the downturn,” suggests Michael Grohs, research analyst for the Institute of Corporate Productivity.

Training Investment Model

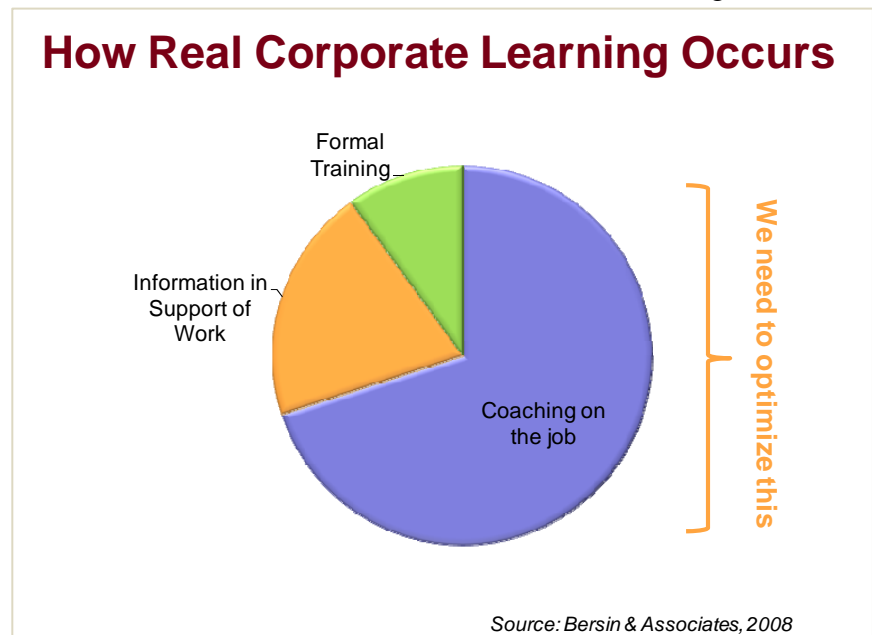


Source: Bersin & Associates, 2008

Bersin & Associates agree stating that, “We all know that formal training may accommodate 10 percent of the development needs of workers. How do we harness the informal and coaching needs of employees without spending millions of dollars on knowledge management projects (most of which fail)? The answer is to unleash the power of collective knowledge within companies. They suggest in their graphic¹ that we need to optimize coaching on the job.

Coaching, it seems, will continue to play an increasingly important role in performance management.

Bersin & Associates state that, “While ranking, rating and calibration sessions continue to be vital parts of [the performance management] process, the real value of performance management is in the coaching and development areas. Approximately 60 percent of organizations tell us that they focus on coaching and development (versus competitive assessment), and **these companies are generating 20 percent to 30 percent higher returns from the process.**”



¹ The information from Bersin & Associate’s report was used with permission from the company. For your free copy of the Bersin & Associates report, Enterprise Learning, Recruiting and Talent Management 2009, please contact us at info@unlockit.com.

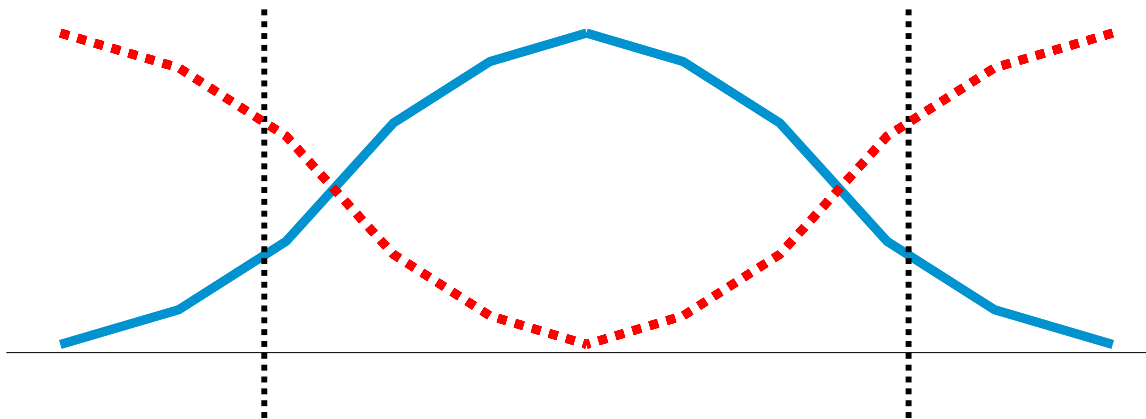
An Employee Imperative

According to a variety of studies, many employees — good employees — don't feel that they receive the coaching they need to improve performance. After surveying 2,600 U.S. workers, New York-based Mercer Human Resource Consulting (April 2003) found that:

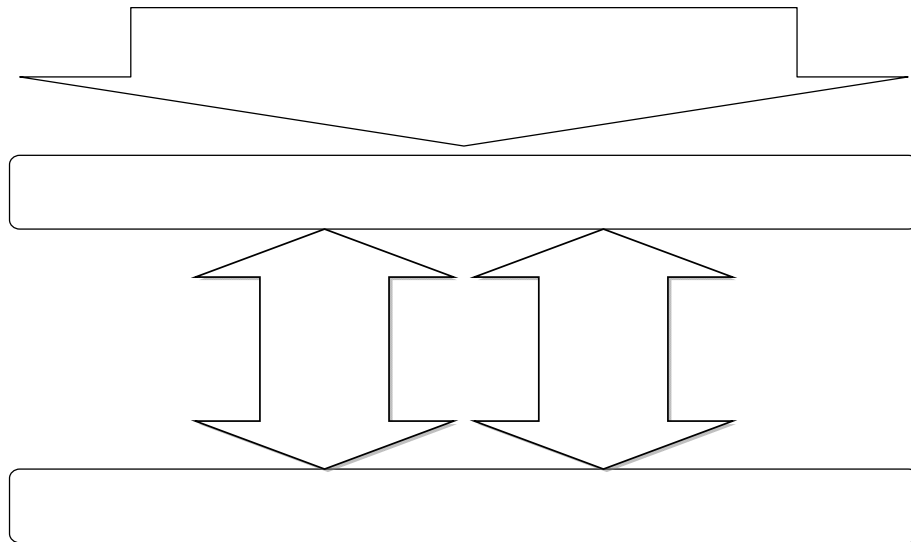
- Only one-fourth of employees indicated that their managers coach them to improve performance.
- Forty-two percent say that their manager gives them regular feedback on their performance.
- Just 29% say that they are rewarded when they do a good job.

Towers Perrin, another New York-based consulting firm, concluded from surveying 35,000 U.S. workers that only one-fifth of workers are highly engaged in their jobs.

80/20 Rule



Analyzing Performance

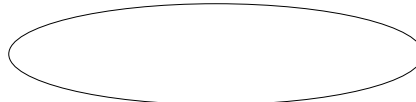


Bottom Line Regarding Human Performance

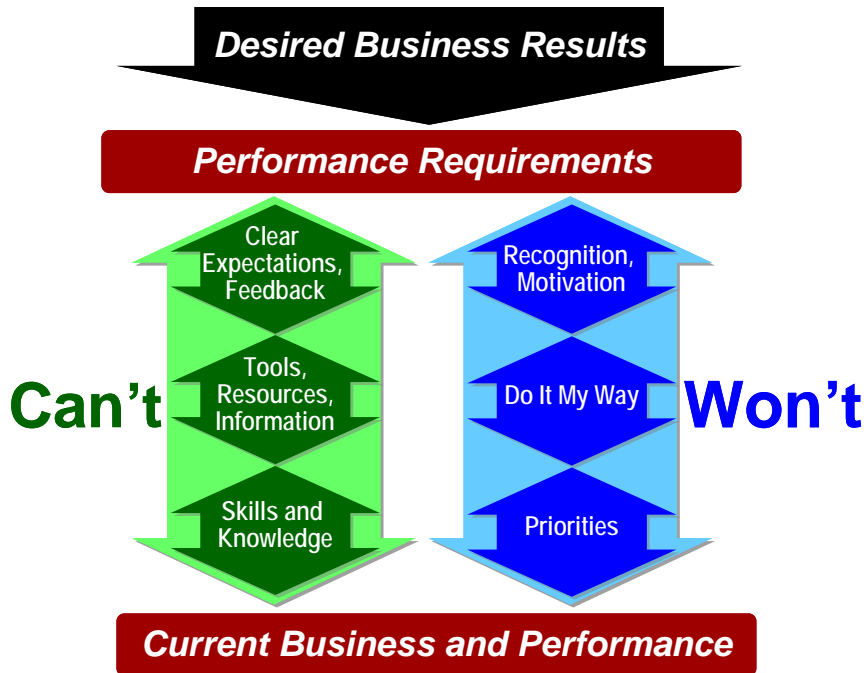
**People don't
perform as you
expect
because they**



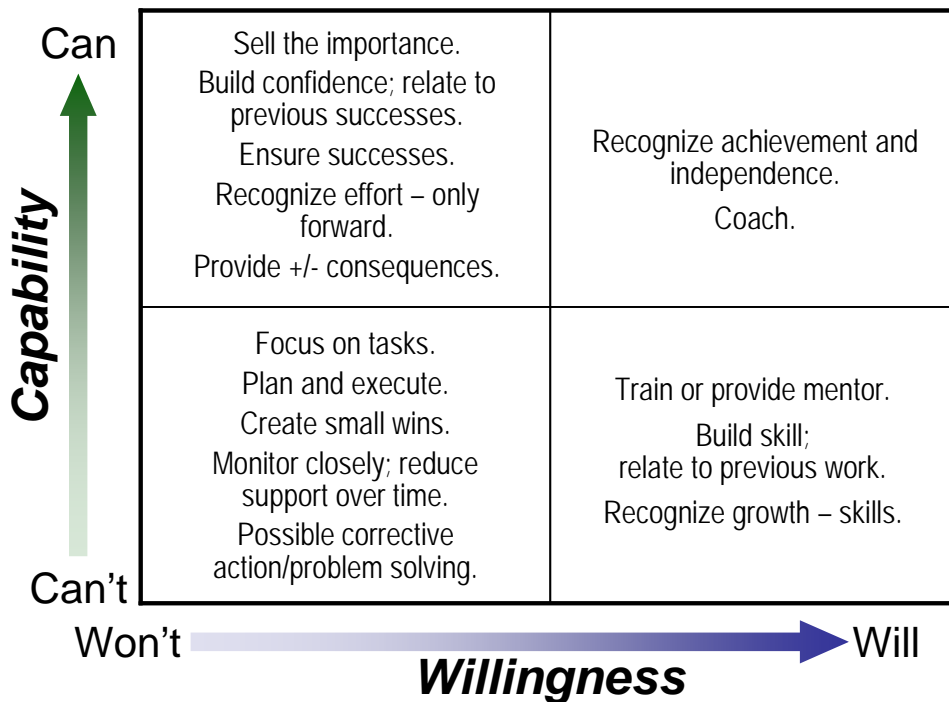
and/or



Analyzing Performance



Situational Performance Management



Coaching is a...

...TWO-WAY INTERACTIVE PROCESS OF COMMUNICATION, FACILITATION, AND DISCOVERY (this is what we're doing)

- Coaching happens between two people.
- Both parties are willing participants.
- The process is safe and predictable; sharing a common terminology and both people learning.

...METHOD OF BUILDING COURAGE, SELF-ESTEEM, RESPONSIBILITY, AND COOPERATION THROUGH SELF-ASSESSMENT, DISCLOSURE, AND FEEDBACK (this is how we're doing it)

- Courage enables people to take known risks.
- Self-esteem — builds on personal strengths — enables people to excel.
- Responsibility encourages decision making and accepting consequences.
- Teamwork recognizes that people succeed through others.
- Self-assessment is an internal evaluation and feedback process to identify and build on strengths and address areas needing improvement.
- Disclosure — revealing a part of self previously unknown to the other — establishes a professional intimacy enabling the relationship to thrive.
- Feedback provides another person's perspective on performance.

...COMMITMENT TO SUPERIOR PERFORMANCE, SUSTAINED IMPROVEMENT, AND POSITIVE RELATIONSHIPS (this is why we're doing it)

- Superior performance is the goal of coaching.
- Sustained, ongoing improvement — we can always improve.
- A commitment to positive relationships underlies the coaching philosophy; people truly are the most valuable asset in the company.

| | Coaching | Counseling | Corrective Action | Mgmt | Feedback |
|--|---|--|--|---|---|
| <i>Emphasis is on...</i> | Job-related skills the employee feels need to be improved | Personal issues the employee feels need to be resolved | Unacceptable behavior or performance the manager feels needs to be resolved | Direction, tools, resources, support, processes, etc. to help employee do the job | Making the employee aware of his/her behavior or the results of his/her actions |
| <i>If this were a sporting event, the employee would be...</i> | On the field, playing | Meeting with a close friend or confidant after the game | On the bench (poor performance) or hitting the showers (unacceptable behavior) | Using the playbook, wearing the uniform, collecting the paycheck, etc. | Listening to team members and colleagues on the sidelines and in the booth |
| <i>...and the manager would be...</i> | On the sidelines, encouraging and providing feedback | The one who suggested the meeting with the confidant | The one who pulled the employee out of the game | The general manager | Providing insight and advice; asking questions |
| <i>These things must be present for this to work...</i> | Willing participants; capable, credible coaches | Participants who are willing to disclose; sympathetic, credible confidants | Clear expectations; clear rules and procedures for addressing performance problems | Business savvy; knowledge of employee needs | Openness for receiving feedback; balanced, objective, specific, supportive statements |

Entelechy's Coaching Model

Coaching is appropriate for developing the skills of employees if the employee is willing to improve. Coaching should not be used as a softer, gentler version of corrective action; if a performance problem occurs, you will want to use Entelechy Problem Solving Model.

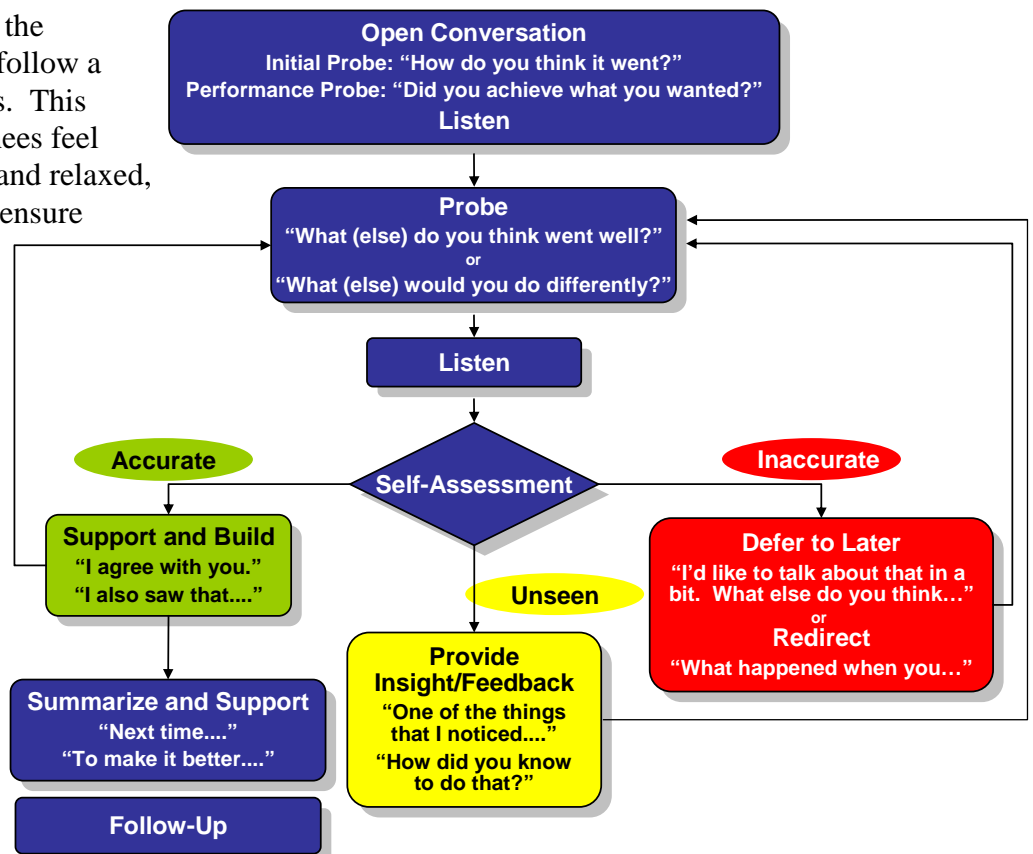
10 Important Principles

Entelechy's Coaching Model is based on several important principles:

1. There are two primary goals to coaching:
 - To improve performance.
 - To help employees gain the ability to self-assess.

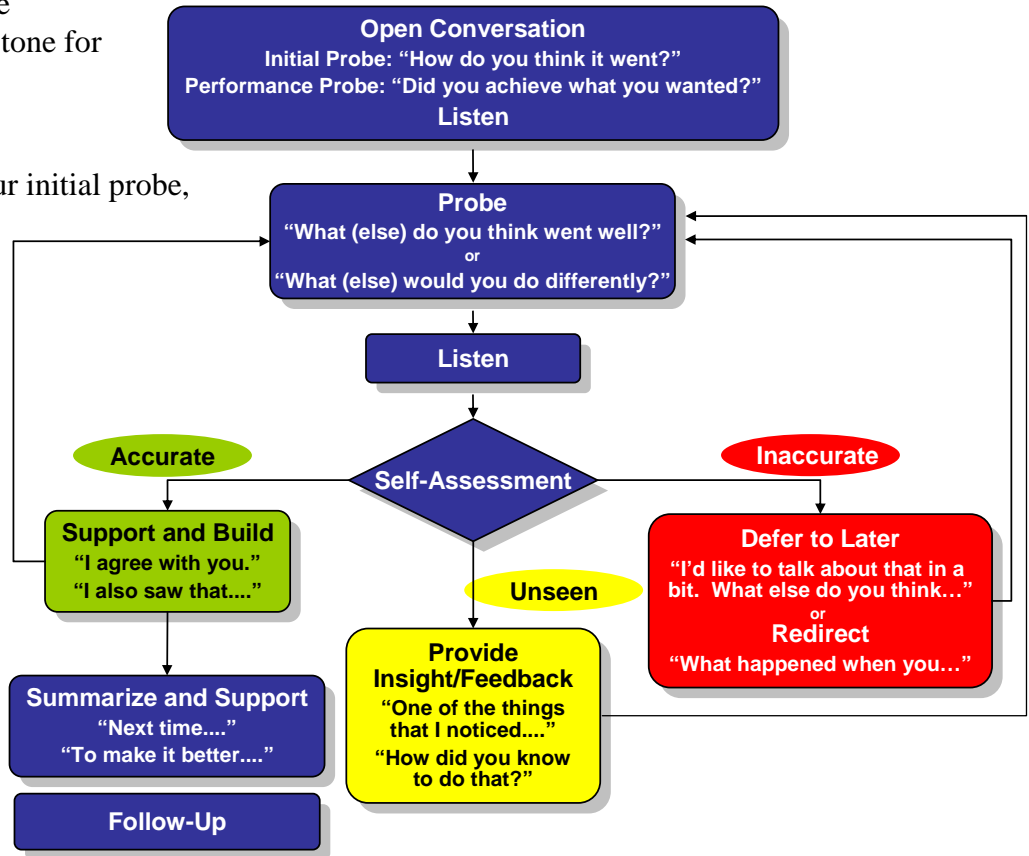
2. It is important that the coaching sessions follow a predictable process. This will help the coachees feel more comfortable and relaxed, which will help to ensure they actively participate in these sessions. It is for this reason that we suggest that you share the coaching model with your employees prior to coaching.

3. Coaching is a planned development process and should not be a surprise.



4. The way you open the conversation sets the tone for what will follow.
5. After we open the conversation using our initial probe, we discuss positives first and areas for improvement last. Beginning with positives first is motivational and accomplishes the following:

- The goal is to have employees increase their performance. If they are not in a positive frame of mind, they will not be open to this change.



- Reinforces good behavior and eases into the coaching session.
- Builds self-esteem.

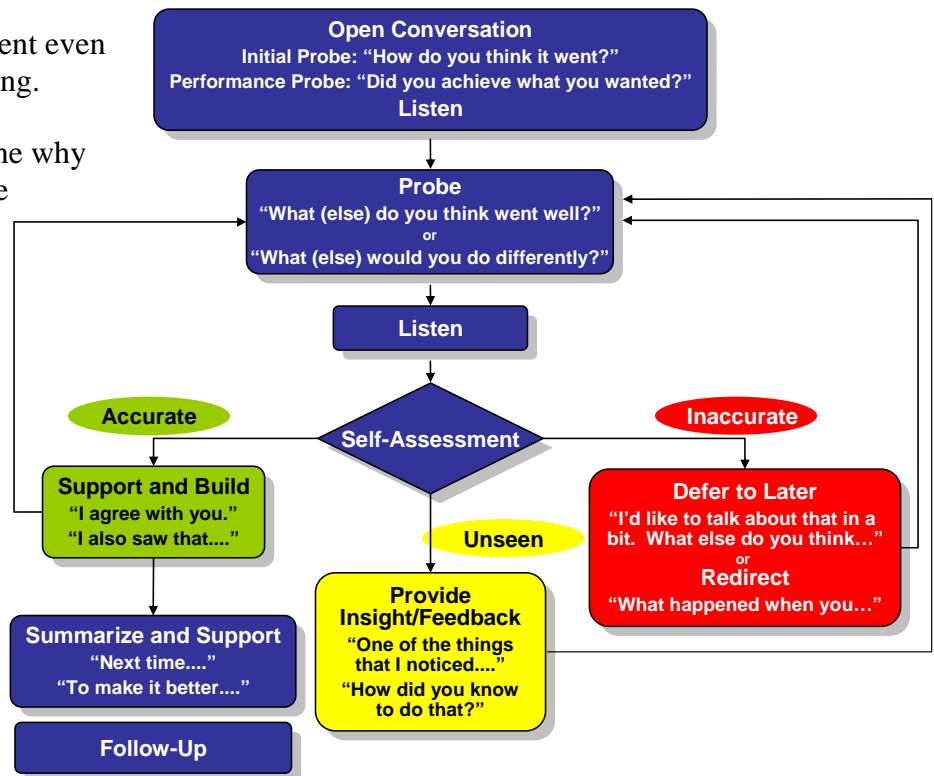
6. Ending the coaching session with a discussion of areas for development ensures that coachees are focusing on those areas.

Wisdom is the reward you get for a lifetime of listening when you'd have preferred to talk.

Today, talk less and listen more.

7. Always give the coachee a chance to self-assess before you offer your insights. Encouraging self-assessment is positive for several reasons:

- It encourages improvement even when you are not coaching.
- It allows you to determine why the employee may not be performing as desired; the employee may not know that he is doing something incorrectly.
- It builds self-esteem.
- It increases the chances that behavior will change.



8. Acknowledge correct self-assessment.

9. Defer or redirect inappropriate or incorrect self-assessment. If an employee is not identifying areas that you identified, use increasingly specific questions to allow the employee to determine the same conclusion that you reached, if possible. This allows you to determine if the employee a) doesn't know what's expected, b) doesn't have the skill, or c) simply chooses not to demonstrate the skill.

10. We focus coaching on only two strengths and two areas for development. Limiting the discussion is important and accomplishes the following:

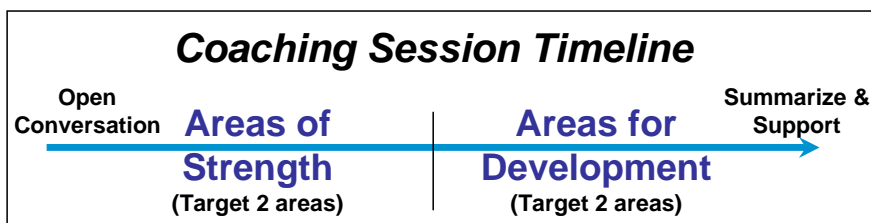
- Increases the coachee's ability to reach proficiency.
- Focuses on the most important issues.
- Other issues can be addressed after some progress has been made on the most important issues first.

A good coach will make his players see what they can be rather than what they are.
— Ara Parseghian

Entelechy's Coaching Conversation Timeline

The coaching conversation follows a simple, yet effective and predictable timeline that consists of four main parts:

1. Open the conversation; indicate that this is a coaching conversation.
2. Identify two positives. Focusing on positives builds the coaching relationship AND ensures that these positives are repeated.
3. Identify two areas for improvement. Coaching is, after all, about growth and development.
4. Summarize and support. Reaffirm the strengths, reiterate the areas for improvement, and convey confidence.



Because we are GUIDING the coaching conversation, the timeline sometimes requires us to intervene. The steps in the coaching conversation are outlined on the pages that follow.

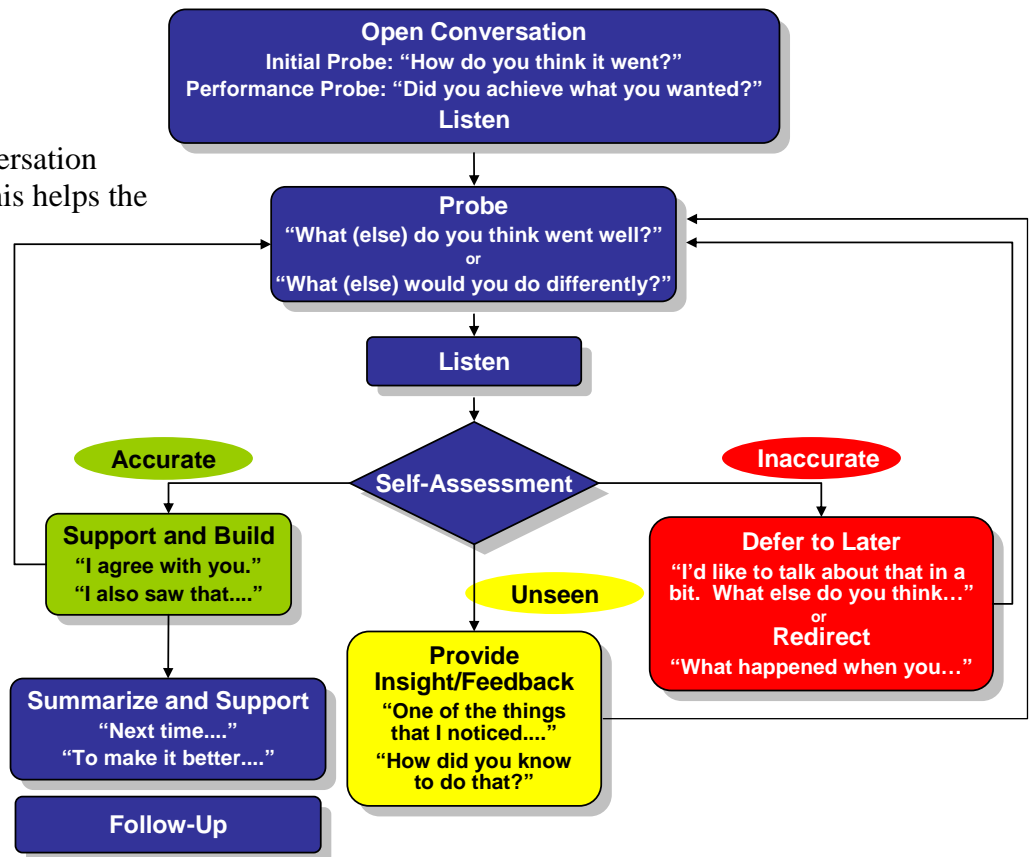
Great things are not done by impulse, but by a series of small things brought together.

— Vincent Van Gogh

Entelechy’s Coaching Conversation

Step 1: Open the Conversation

The coach opens the conversation with a general question; this helps the coach get a sense for the accuracy of the coachee’s self-assessment. If the coachee responds with, “that was the best interview ever” and you thought that the interview was poor, you know that you’ll have to adjust your coaching conversation.



Step 2: Probe for What Went Well

The coach asks the coachee what went particularly well and listens for the responses. By identifying what went well first, a positive tone for the coaching session is set. We want to make sure that the coachee continues doing these things. This also forces the coachee — NOT THE COACH — to identify superior performance.

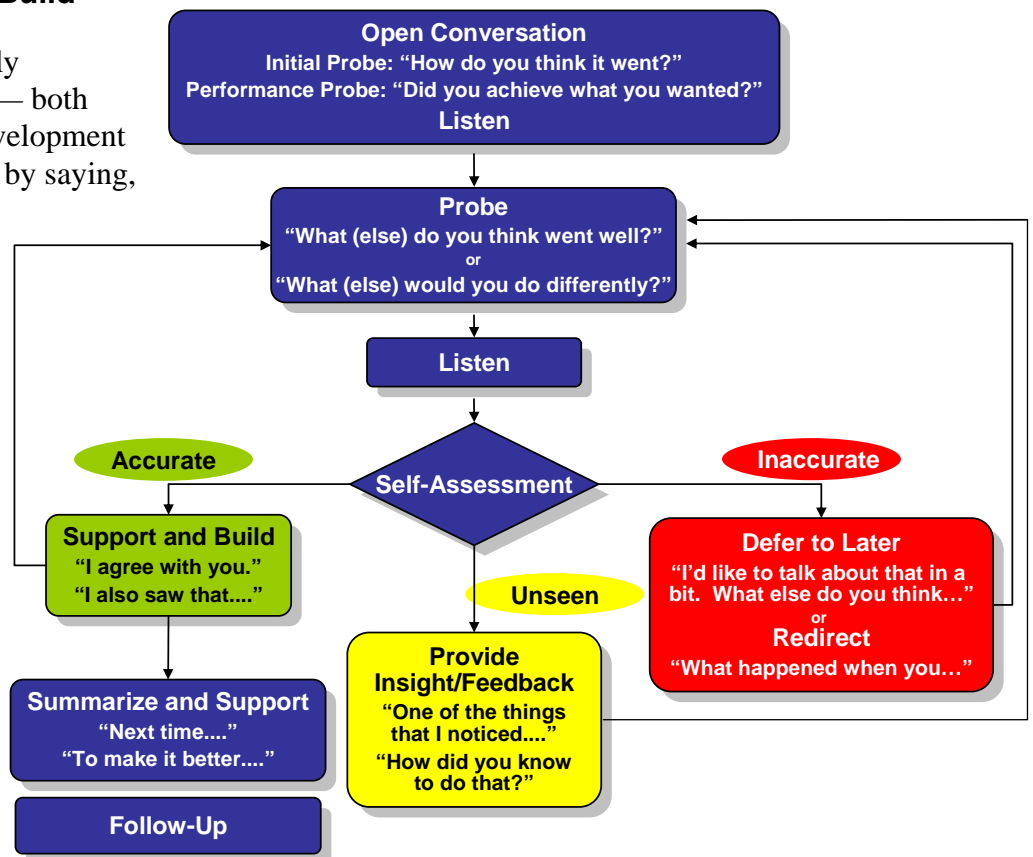
Step 2a: Defer

Sometimes the coachee will bring up a negative when you’re discussing positives. You will want to defer that discussion until later in the coaching conversation by saying, “I’d like to talk about that more later. What else went particularly well?”

Other times, the coachee will claim something as a positive that — in your opinion — was an area that needs development. You will want to redirect the coachee’s perception by pointing out what you saw that helped you conclude that it was less than desirable. “Oh, really? Did you notice the client’s reaction when you made that joke about the old man? That’s right, he seemed a bit embarrassed.”

Step 2b: Support and Build

When the coachee correctly assesses his performance — both strengths and areas for development — support the assessment by saying, “I agree.” Build from the coachee’s conclusion to reinforce the accuracy of his self-assessment. In this way, you are reinforcing one of the most valuable skills anyone can acquire: the ability to assess and improve their own performance.



Step 3: Probe for Areas for Development

The third step is to ask the coachee what he would change if he could do it again. Obviously, if the coachee knows what could be improved and knows how to improve it, he won’t benefit from YOU telling him! And by mentally rehearsing what he will do differently, the likelihood of him actually carrying out the improvement is increased.

You’ll find that you can get anything you want in life
if you will help other people get what they want.

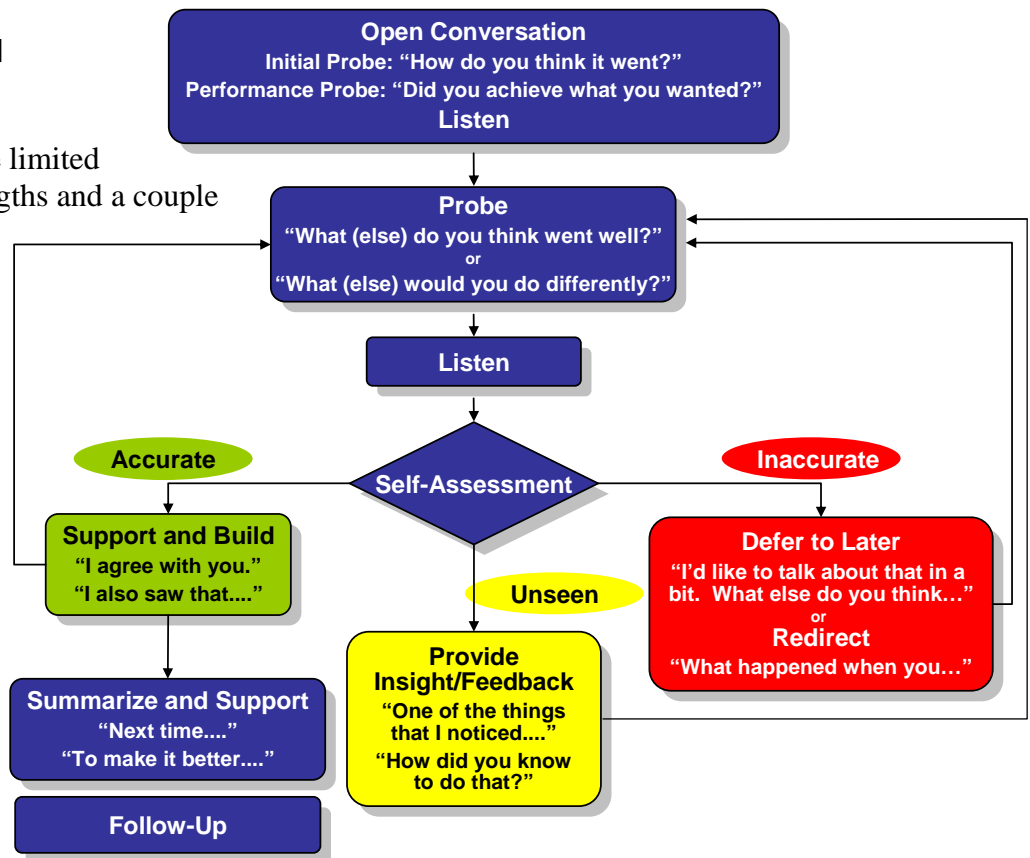
Today, help someone get what they want.

Most experts agree that two or three areas for development are enough for anyone to work on. Working on a laundry list of things to change is frustrating and futile. Focus on the areas of greatest need.

Like Step 2b, it is important that you Support and Build on the coachee’s self-assessment. For employees to continuously improve, they cannot rely on US to be constantly monitoring and providing feedback. We must encourage self-assessment by supporting accurate self assessments — “I would agree.” “That’s very insightful.” — and building on the implications — “In addition, that would also increase the customer’s loyalty...” or “...and by doing as you suggested, you’ll be serving as a role model for other team members.”

Step 4: Summarize and Support

Even though you may have limited the coaching to a few strengths and a couple areas for development, you will want to briefly summarize the discussion, especially what the coachee will do differently the next time. This recap will cause the most important things to remain fresh in memory. You will also want to support the changes by saying something like, “I think those changes will make your next interview go even better.”



Follow these four steps to develop the talent and performance of your employees and actively engage them in that development!

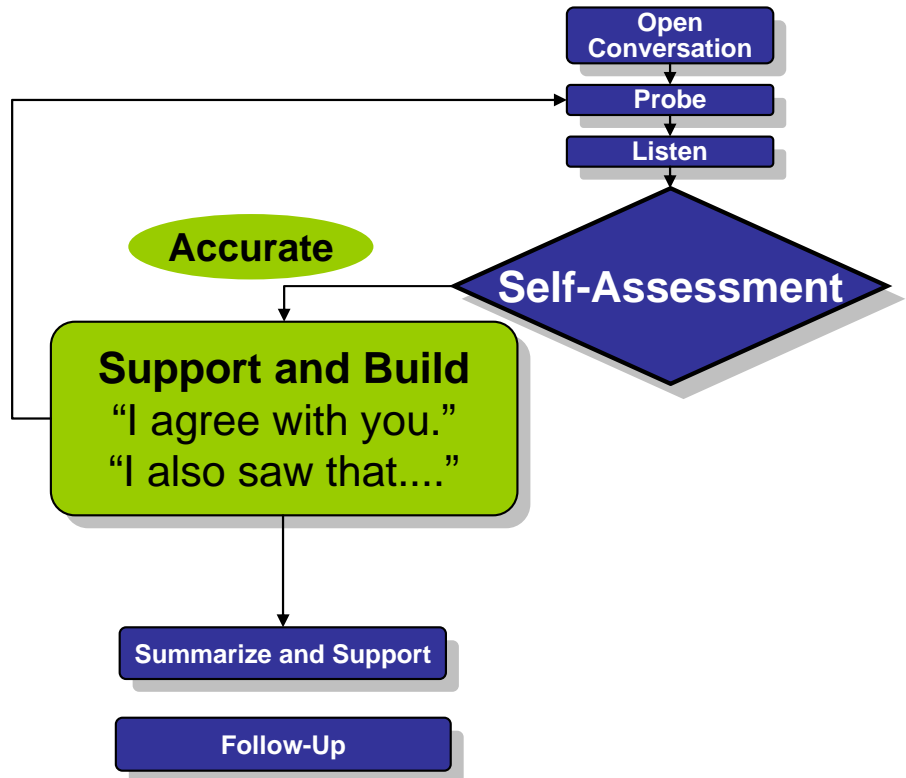
Great challenges are a prerequisite for great achievements.

Accurate Self-Assessment - Demonstration

The PROCESS

What was the probe that helped to open and guide the conversation?

Why do you think the coach asked this question?



What other probing questions did the coach ask to help the coachee self-assess?

What other aspects of the coaching conversation did you find effective?

Accurate Self-Assessment - Demonstration

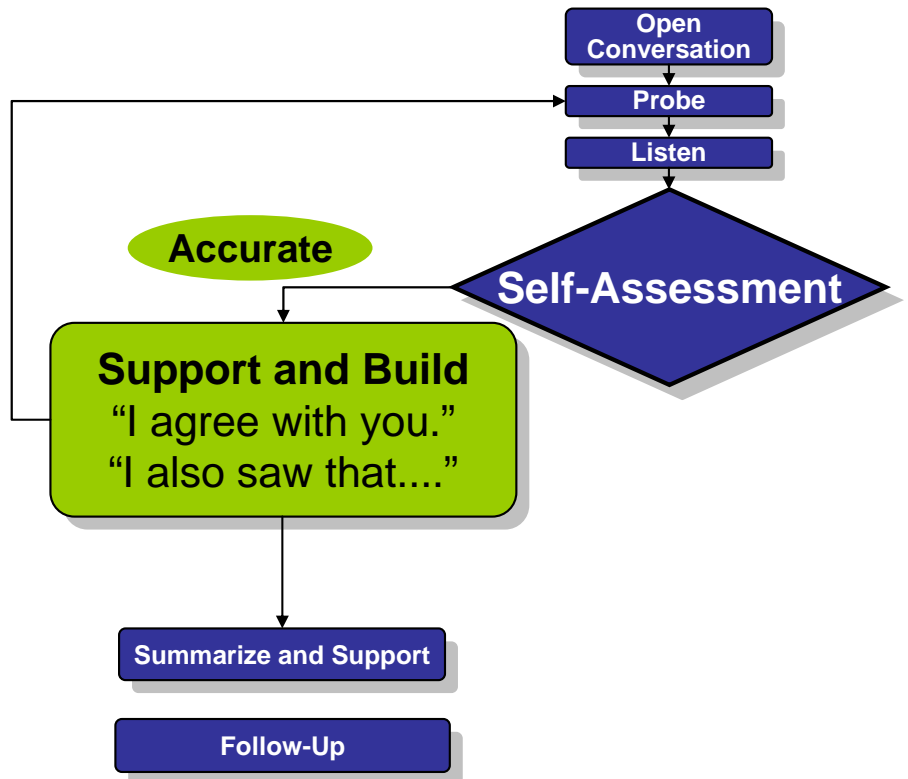
The CONTENT

What areas for improvement were uncovered?

How did the coach help the coachee recognize the necessary improvement without having the coachee become defensive?

How did the coach respond when the coachee accurately assessed his/her performance?

Why do effective coaches acknowledge the correctness of the coachee's assessment?

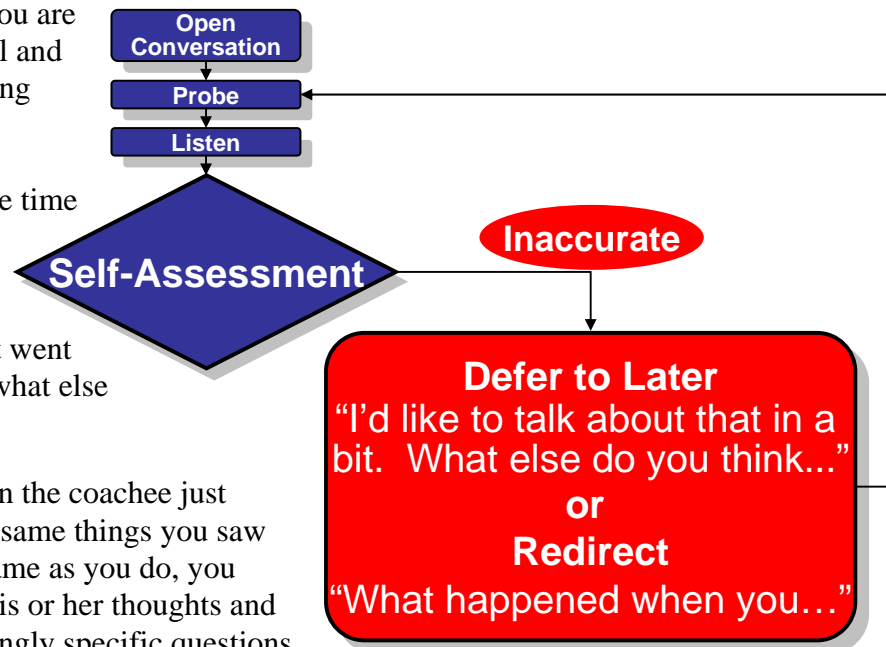


Inaccurate Self-Assessment

There are two primary instances of inaccurate self-assessment and each is handled in a unique way.

Instance #1 - Defer: When you are discussing areas that went well and the coachee brings up something that you think was an area for development, you DEFER the discussion until the appropriate time in the coaching session. You state, “I’d like to talk about that in a bit.” And then you jump right back into areas that went well with another probe, “So what else do you think went well?”

Instance #2 - Redirect: When the coachee just doesn’t seem to have seen the same things you saw or interpret the situation the same as you do, you must REDIRECT or refocus his or her thoughts and perceptions by asking increasingly specific questions. For example, “Did you notice what the customer said when you interrupted?” or “How do people respond when you become impatient?”



The coach could have just stated what needed improvement. Why is it better to get the coachee to figure out what could’ve been improved? Reasons include:

- People buy in more when they identify the problems and solutions themselves.
- People won’t change if they don’t believe there is a need to.
- The employee develops the ability to self-assess.

A candle loses nothing by lighting another candle.

— Erin Majors

Giving Insight/Feedback

Sometimes we need to provide the coachee with our insight or feedback. While it's best to ask questions that lead the coachee to the appropriate assessment, at some point our questioning begins to appear manipulative.

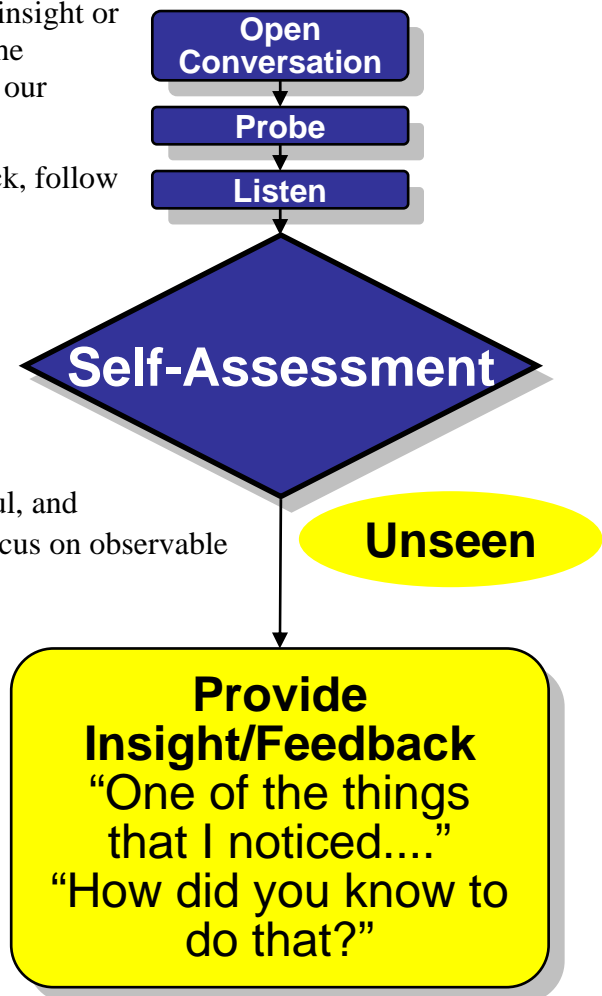
When we provide insights, observations, and feedback, follow the HUBS Model. The HUBS Model is a way to communicate in an encouraging manner.

Helpful - Your communication should be for the intent of supporting the employee's performance. Treat all employees as professionals: With respect and dignity.

Unbiased - Information should be first-hand, truthful, and credible. Don't pass on rumors. Feedback should focus on observable behaviors or results.

Balanced - Information should balance the needs of your company with the needs of the individual. You should communicate with empathy. At the same time, communicate with a firm sense of reality (avoid fluff).

Specific - Information — especially feedback — should be specific. Avoid generalities and references to vague elements. Instead, note specific observable behaviors that you saw and results that occurred as a consequence.



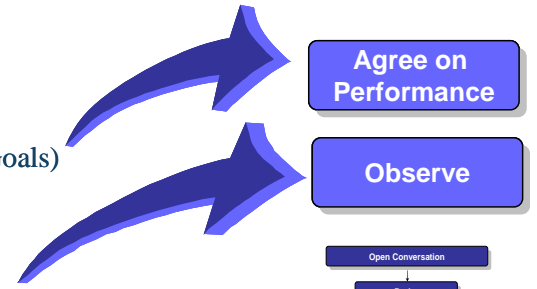
In addition to following the HUBS Model for feedback, it is important to monitor your tone and non-verbals.

Listen actively to all of the coachee's responses.

What to do Before the Coaching Session

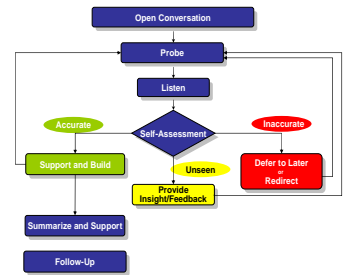
We've covered the actual coaching session — which is the third step in the coaching process. Let's now return to the first and second steps of the coaching process — steps to take BEFORE the coaching session.

- Agree upon performance (Performance Goals)
- Observe performance



It's important that coachees are aware of the coaching process and see the value of that process. It is important to refresh the coachee's memory of the coaching process each time you meet with the coachee — at least initially — to help engrain the model and foster self-assessment.

- Not an interpretation and not a label.
- Observable. *I can see it or hear it.*
- Reliable. *Two observers would agree what happened.*
- Measurable. *I can count how many times I see or hear it.*
- Specific. *The details of the event are pinpointed.*



The first step in the coaching process is to agree upon the specific skills or competencies to be observed and coached before the coaching session. We discussed earlier why this is important.

It is important to identify specific skills to be coaching on before the coaching session and before the observation since you want to observe only those skills and behaviors that are critical to the job and be prepared with observation examples. It is also important to observe performance in order to target your feedback and coaching, and be able to offer insight and recommendations based on actual circumstances.

If you cannot actually view the performance for yourself, consider how the results of the employee's performance exhibit themselves. Can you:

- Listen to recorded calls (for customer service or sales, for example).
- Review documents, reports, meeting minutes, etc.
- Talk to others present.

Of course, the employee should know of these “observation techniques” before you use them. Done without the employee's awareness, these techniques could appear manipulative, spiteful, and — at the very least — in poor judgment.

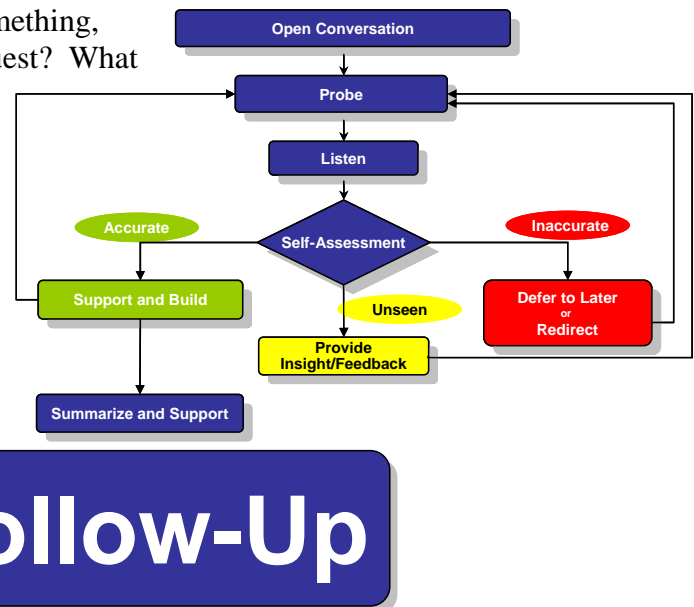
Follow-Up

A critical but often overlooked step is follow-up. Follow-up lets the employee know that what you discussed is important and truly matters. And it lets the employee know that you care enough to follow-up.

Have you ever been asked by your manager to do something, and then the manager never again referenced the request? What did you think? How did you feel? What did you think when your manager made another request?

Follow-up need not be time consuming; it can be a very simple and brief process. It is, however, extremely critical!

Documenting the coaching conversation is useful for your follow-up. One of the most powerful tools you have as coach is your notepad. Take notes as you go through the coaching conversation to help you follow up with specifics. “Joe, how’s it going with using the headphones as a way of reducing distractions?” is a lot more powerful than “Joe, how’s it going?”



Entelechy’s Coaching Model Summary

Coaching is a one-to-one mutual conversation that follows a predictable process. The benefits of using Entelechy’s Coaching Model include:

- Simple to use and time saving.
- Increases employee engagement and reduces tension that often accompanies feedback.
- Develops employee talent and increases the likelihood that the development will stick.

Entelechy’s Coaching Model, when used consistently over time will result in a stronger employee-coach relationship, employees who can self-assess (and even coach themselves!), and increased productivity. While one-fifth of employees may not need coaching since they’re already charged up about their work and confident in all of their abilities AND another fifth of employees are simply not ready for coaching since they’re so disengaged from their work, coaching can be used to improve the productivity and morale of “the massive middle” of your employee base.

The Coaching Silver Bullet

Don't have time for a coaching session? Try the coaching silver bullet.

Recognize Your Winners

Fran Tarkenton, former Minnesota Vikings quarterback, once called a play that required him to block onrushing tacklers. NFL quarterbacks almost never block. They are usually vastly outweighed by defenders, so blocking exposes them to the risk of severe injury.

But the team was behind, and a surprise play was needed. Tarkenton went in to block, and the runner scored a touchdown. The Vikings won the game.

Watching the game films with the team the next day, Tarkenton expected a big pat on the back for what he had done. It never came.

After the meeting, Tarkenton approached Coach Bud Grant and asked, "You saw my block, didn't you, Coach? How come you didn't say anything about it?"

Grant replied, "Sure, I saw the block. It was great. But you are always working hard out there, Fran. I figured I didn't have to tell you."

"Well," Tarkenton replied, "if you ever want me to block again, you do!"

Don Martin, *A Third Serving of Chicken Soup for the Soul* Reprinted with permission, 1998. Health Communications, Inc., Deerfield Beach, FL

***Catch
someone
doing
something
right ...***



... and tell 'em!

They may forget what you said, but they will never forget how you made them feel.

— Carl W. Buechner

What Can You Recognize?

Catching someone doing something right and telling them is VERY powerful. But you don't have to only recognize results!

WHAT can you recognize?

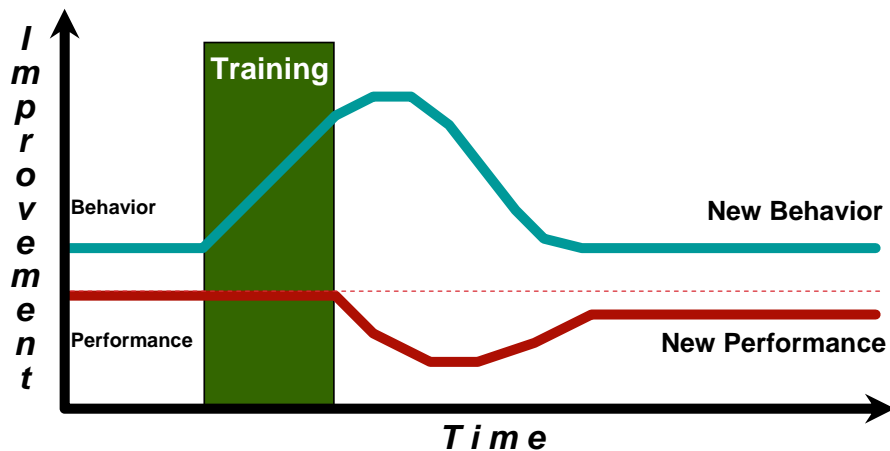
| What Can You Recognize? | | |
|------------------------------|--|--|
| Type | Examples | What to Say |
| Contributions (tangible) | Completion of a project. Perfect attendance. | <i>Thanks, that helped a lot. You're good at _____, could you help me out?</i> |
| Contributions (non-tangible) | Team spirit. Initiative. | <i>It was thoughtful of you. I appreciate your _____.</i> |
| Improvement | While contributions are still not what they should be, the employee has shown improvement. | <i>Look at your progress! You're improving in _____ (be specific).</i> |
| Effort | While improvements may not yet be apparent, the employee is trying hard and doing the right things. | <i>You really worked hard on that! It seems that you took a lot of time thinking things through...</i> |
| Potential | When selecting an employee for a task, recognizing potential can be a tremendous confidence builder. | <i>I know you can do it. You're ready for this.</i> |

HOW Can You Recognize?

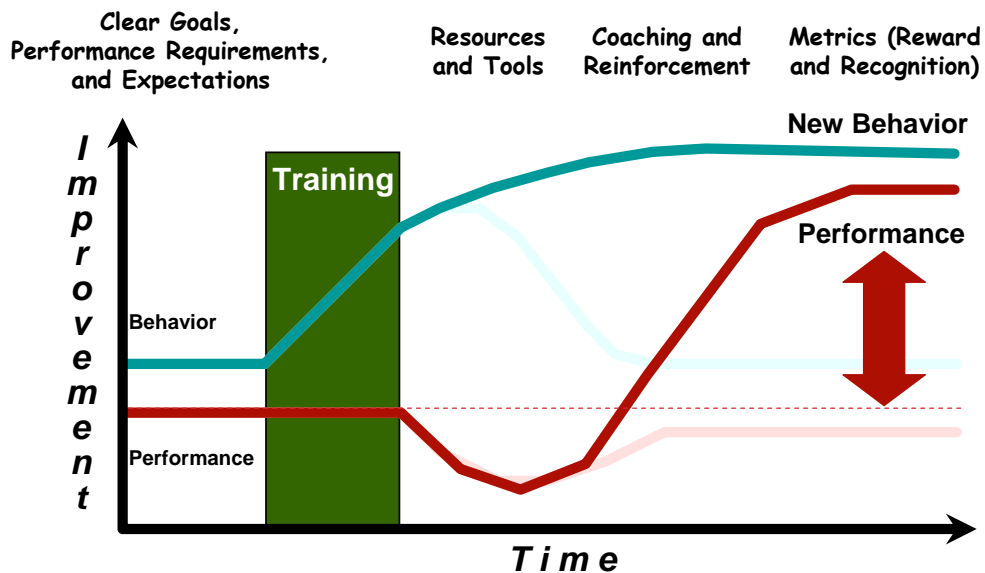
- Pat on the back.
- Recognition at regular meeting.
- Write-up.
- A card.
- A gift certificate.

Talent Development Requires Support

Training Results Without Management Support



Training Results With Management Support



When Coaching is NOT the Best Solution

Coaching is appropriate for employees who are willing — or even eager — to develop a particular skill. If an employee is not willing to develop a skill, that person is not yet a coaching candidate.

Coaching works best when there exists an authentic, supportive relationship between coach and coachee. If the employee perceives the manager as manipulating, lacking in credibility, or otherwise unsupportive, coaching will not work.

Coaching is an inefficient method of sharing information or giving direction. If an employee needs information or direction (because they don't know how to do something), coaching — while sometimes effective — is most often an inefficient way to help the employee in these cases. Coaching helps develop SKILLS. Coaching is predicated on the belief that most employees know many tenets of core business skills. (Most workers, for example, know HOW to effectively communicate with others. They may not actually demonstrate that they know how, but when asked, they usually can rattle off the core behaviors.) Employees need support and guidance in putting what they know into practice. Not surprisingly, these business skills — negotiation, interviewing, problem solving, prioritizing tasks, workload management, time management, delegation, supervision, leadership, etc. — comprise the foundation of what our employees do every day.

Implementing a Coaching Initiative

- Sell the value (articulate the benefits).
- Start where you are.
- Tie coaching to performance metrics.
- Separate coaching from performance management.
- Define YOUR coaching model and process.
- Start with those who want; build to those who need.
- Keep it valuable (broadcast the benefits).

Sell the Value To...

Executive Leadership

- Focus managers and supervisors on key mission-critical behaviors.
- Keep people positively engaged during distracting economic and market conditions.
- Take advantage of the learning that comes when facing challenges that come only during difficult times.

“How do we harness the informal and coaching needs of employees without spending millions of dollars on knowledge management projects (most of which fail)? The answer is to unleash the power of collective knowledge within companies.”

p 15, Enterprise Learning, Recruiting and Talent Management 2009: Predictions for the Coming Year, Bersin & Associates

Human Resources

- Tie day-to-day performance with job competencies.
- Leverage the company’s goal-setting and performance appraisal system.
- Tie rewards and recognition to performance.
- Identify and develop high-potential employees — tomorrow’s organizational leaders.

“...build an integrated approach to talent management, capability development, leadership development and corporate training – which allows an end-to-end system for managing people.

...invest now in collaborative and social networking solutions that save money in travel and empower the workforce during transformations.”

p 4, Enterprise Learning, Recruiting and Talent Management 2009: Predictions for the Coming Year, Bersin & Associates

Operations and Finance

- Take advantage of (and build) the natural teaching/learning relationship that exists between manager and employee.
- Build capabilities on the job while doing real work without additional out-of-pocket time (and expense).
- Invest where the learning and development will have most impact — front-line supervisors and managers.
- Retain — and improve — the infrastructure that will enable the organization to take advantage of the economic rebound (and it WILL rebound).
- Retain — and develop — the talent that will become tomorrow’s leadership.
- (Re)equip managers and supervisors with the skills they need to do job #1: improve the performance of their team members.
- Engage employees. If you’re going to lose employees, lose them by decision, not through perceived apathy and lack of leadership.
- Engage ALL employees regardless of generational mix by focusing on the one thing they all have in common — performance.
- A small investment in coaching training will have a significant and cascading effect to the lowest levels in the organization where the work gets done.
- Reduce travel and training expenses by teaching managers and supervisors how to train employees directly.

“The risks of an indiscriminate cut can be major. If leadership development training, for example, is eliminated or dramatically reduced, you will see a reduction in the productivity and effectiveness of your company’s leaders. During an economic downturn, leadership is more important than ever. Leaders will be asked to:

- *Restructure their departments;*
- *Improve productivity;*
- *Find new ways to drive value; and,*
- *Work even harder to rebuild the business.*

Does it make sense, then, to take away that small amount of money spent on building their skills, capabilities and internal networks?

Our research shows that the “high-impact” organizations do reduce costs – but they do it strategically. They do not cut long-term strategic development programs and they do not eliminate high-value, performance-driven training programs (like onboarding and sales training). Rather, these high-impact organizations focus on improving productivity, and use the downturn as an opportunity to “fix and repair” inefficiencies that inevitably build up in any bureaucracy.

p 2-3, Learning and Development during an Economic Downturn, Bersin & Associates

Entelechy can help you create a case for coaching within your organization; we’ll work with you without charge to help you identify the benefits of coaching within your organization so that you can implement your company’s coaching initiative.

Tie Coaching to Performance Metrics

It is important — especially during economically challenging times — to tie coaching to meaningful operational performance metrics — increased sales, increased margins, reduced errors, increased efficiencies, etc. For example, a key — albeit general — metric used in the customization and delivery of Entelechy’s Coaching for Talent Development and Employee Engagement program from MediaOne was overall employee performance. A year after Entelechy customized and rolled out the program, MediaOne had its biggest quarterly profit in U.S. history when it earned \$26.6 billion in the second quarter of 1998, a record that continues to stand as THE biggest quarter for any U.S. company².

The possible benefits of implementing a coaching initiative can be even more powerful (and irrefutable) when tied to specific performance measures. Entelechy created a customer service program that focused on key upselling skills of MediaOne’s customer service representatives (CSRs). When combined with coaching provided by the CSRs supervisors, the quantifiable results were

staggering. As illustrated on the table to the right, MediaOne expected to gain — conservatively — an estimated **\$16.8M in additional annual revenue** AND increase customer satisfaction at the same time. Moreover, customer service representatives and field installation specialists gained valuable skills.

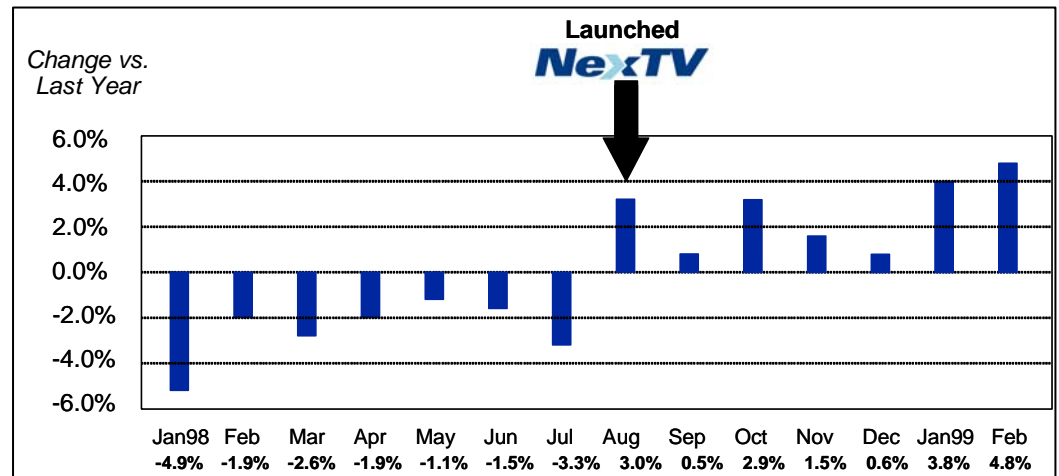
| | | |
|---|--|---------------------|
| A | Average # of calls per day per employee | 80 |
| B | % of calls where no upselling occurs | 80% |
| C | Daily opportunities (# of calls) to upsell (A*B) | 64 |
| D | % Goal to upsell (realistic yet challenging) | +10% |
| E | # of additional daily sales (C*D) | 6 |
| F | Average revenue/sale | \$7 |
| G | Additional daily revenue potential/employee (E*F) | \$42 |
| H | Additional annual revenue/employee (G*200 days) | \$8400 |
| I | Approximate number of employees company wide | 2000 |
| J | Anticipated Results (H*I) | \$16,800,000 |

² Ford Motor Co. had the second-biggest profit in U.S. history when it earned \$17.6 billion in the first quarter of 1998. AT&T’s \$11.4 billion profit in the third quarter of 2001 was No. 3 on U.S. record. Exxon Mobil ranks No. 4 and No. 5 with earnings of \$8.42 billion in 2004’s fourth quarter and \$7.86 billion in 2005’s first quarter.

Source: *Exxon Mobil 2nd-Qtr Profit Climbs as Oil Prices Soar*, [Bloomberg Online](http://quote.bloomberg.com/apps/news?pid=10000006&sid=azeCEwgSU0Tc&refer=home) July 28, 2005
<http://quote.bloomberg.com/apps/news?pid=10000006&sid=azeCEwgSU0Tc&refer=home>

Additional Results:

Based on the success of the general customer service training program, MediaOne asked Entelechy to create training for its nationwide rollout of new cable product offerings (MediaOne — like all cable companies — offered various packages of cable channels that would appeal to current and new subscribers.). The program — called NexTV — was MediaOne's first effort at including skills training and coaching as part of a product launch. Entelechy created a training program that combined NexTV product features and benefits with upselling skills and supervisor coaching/reinforcement skills.



As a result of the NexTV training, over \$300,000 of incremental revenue was realized.

When looking at monthly income from one year to the next, it was clear that the NexTV campaign — with Entelechy-designed training and supervisor coaching — resulted in significant revenue increases.

Tie the implementation of your organizational coaching initiative to a key corporate initiative to focus the coaching and to measure the impact of the initiative. Do this BEFORE implementing the initiative (or as part of the initial steps of the implementation) to isolate the metrics and the variables — in addition to coaching — that may impact the metric.

Entelechy's Coaching Self-Assessment

Read each of the following statements. Rate yourself to determine your area(s) of greatest need for development in developmental coaching. Evaluate your ability in this skill from low (1) to high (4). Then rate how important this skill is to your success. Make notes or comments as you go along.

| <i>Developmental Coaching Skill</i> | <i>Ability</i> | | | | <i>Importance</i> | | | |
|---|----------------|---|-------------|---|-------------------|---|-------------|---|
| | <i>Low</i> | | <i>High</i> | | <i>Low</i> | | <i>High</i> | |
| 1. I effectively present concepts and ideas. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 2. I listen actively, demonstrating an understanding of others' views and needs. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 3. I adapt my style of interacting to meet the unique needs of the other person. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 4. I establish clear expectations for performance. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 5. I give candid and constructive feedback. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 6. I tailor my coaching sessions to individual development needs. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 7. I give people as much responsibility as they can handle. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 8. I recognize and reward others for attaining their highest potential. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 9. I am able to distinguish possible reasons why people aren't performing as expected. These reasons could be lack of clear expectations, lack of resources, lack of skills and knowledge, etc. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 10. I am able to describe how incentives are intended to motivate people to achieve desired business goals. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 11. I understand the compensation system in place in the organization. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |

Continued on the next page.

| <i>Developmental Coaching Skill</i> | <i>Ability</i> | | | | <i>Importance</i> | | | |
|---|----------------|---|---|-------------|-------------------|---|---|-------------|
| | <i>Low</i> | | | <i>High</i> | <i>Low</i> | | | <i>High</i> |
| 12. I clearly articulate — and continuously share information regarding — the vision and strategies of the company. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 13. I translate <i>big picture</i> concepts into goals and objectives that can be implemented. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 14. I help each employee understand how his/her role supports the business. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 15. I create an environment where people take calculated risks. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 16. I assign clear authority and accountability. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 17. I hold myself and others accountable for performance and meeting commitments. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 18. I work with others to set priorities based on what is most important to the business. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
| 19. I create an environment that encourages continuous learning and improvement. | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |

My coaching strengths: _____

My areas for priority development: _____

In order to be successful, you must be willing to do the things today others won't do, in order to have the things tomorrow others won't have.

What Entelechy's Clients Say

Americas Headquarters
Operations

November 15, 2008

Terence Traut, President
Entelechy, Inc.
PO Box 878
Merrimack, NH 03054



KONE Inc.
Americas Headquarters
4225 Naperville Rd., Suite
400
Lisle, IL 60532
www.kone.com

Dear Terry:

On behalf of KONE Americas, I want to thank you and your team for the design, development, and delivery of KONE's Supervisor Development Program (SDP), a key element in our Must-Win Battle for people leadership.

From the early stages of the design of SDP, when you interviewed KONE's leadership to identify the specific supervisor needs and challenges to the 24th delivery of the program, signaling the completion of the SDP rollout throughout the Americas, it was apparent that you were truly KONE's partner concerned about our success. It was clear to me and my team that our SDP was not simply a generic off-the-shelf product.

At KONE, our employees represent an opportunity for us to improve our performance. Largely union based, employee engagement and development can be a challenge. However, KONE is fully committed to continue to grow our business and to capture market share. For this to happen, we realize that it must happen through our employees. That puts KONE's supervisors and manager's front and center in this battle for people leadership and places the responsibility for communicating with, motivating, managing the performance of, and coaching employees squarely on the shoulders of our supervisors.

Many KONE supervisors and managers had not previously participated in this caliber of formal management and leadership training, so it was important that our SDP focus on key skills and present those skills in a way that was straightforward yet engaging, and immediately applicable. The exercises, videos, and KONE scenarios you built into the training made SDP a program that exceeded my expectations.

Additionally, the extra attention Entelechy paid to building management communication and reinforcement tools — the Management Reinforcement Toolkit and the E-Learning Refresher — will ensure that the skills covered in SDP become engrained in our supervisors and managers.

While it is too early to determine the long-range impact of SDP, I am confident that our supervisors and managers now have the skills they need to attract, retain, and develop the top talent that will continue to propel KONE to new heights in the industry.

Thank you and thanks to the rest of the Entelechy team. Yours truly,

A handwritten signature in black ink, appearing to read "David McFadden". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

David McFadden
Senior Vice President, Service Business

About Entelechy, Inc.

Entelechy was formed in 1992 to address the increased sophistication of today’s management in expecting — and demanding — high levels of performance from their teams and individuals.

Calling Entelechy a training company belies the true essence of the work we do. While we do design, develop, and deliver some of the most effective training in the industry, what we do before we design training sets us apart from other “training companies.”

We consult with you, your managers and supervisors, and your employees to determine three things:

- What performance is required? What are you looking for people to do? And how does this performance help you achieve your business goals?
- What is the current performance?
- Why isn’t current performance at the required performance level?

Our business-focused approach ensures that we design, develop, and deliver the most effective performance change possible, one that will change your company and positively impact your bottom line. Whether it’s world-class training, job aids, documentation, coaching, consulting, web-based training, or user help, the solution you get from Entelechy is guaranteed to help you achieve your business goals.

Begin unlocking the potential of your individuals and teams by contacting Entelechy at 800.3.POTENTIAL or 603-424-1237 or emailing info@unlockit.com. Or, visit our websites:

- *Coaching for Talent Development and Employee Engagement* (focuses completely on Entelechy’s Coaching Programs): www.coachyouremployees.com
- *Entelechy Home* (outlines Entelechy’s complete line of customizable training programs and services): www.unlockit.com

We make training. Great training. Your training.

Entelechy congratulates all 2009 Training 125 winners and thanks its clients on this year's list.

Training 125 winners know that **generic** training produces generic results. Engage employees and develop talent with Entelechy's **customized** training.

Entelechy draws from its proven modules to create truly customized blended training for YOU, embedding YOUR scenarios, policies, and practices and addressing YOUR challenges and goals. We create YOUR training and YOU own it!

Want to make the list next year? Contact Entelechy.

Call us at 800.376.8368 or email Entelechy's president, Terence Traut, at ttraut@unlockit.com to see how Entelechy's customized training can unlock the potential of your leaders and employees.

en-tel-e-chy
unlocking potential
www.unlockit.com

Contact Entelechy:
800.3POTENTIAL
(800.376.8368)

General information is available at our website:
www.unlockit.com
or via email at info@unlockit.com

Coaching for Talent Development
Unlocking Employee Engagement

Coaching is THE KEY to Unlocking Employee Performance

Do your Managers and Supervisors have these coaching skills?

Coaching is the Key
• All new products
• All new support materials
• Available in multiple languages
• You can be ready single coaching

How It All Fits Together
• Customized
• Customized
• Customized
• Customized

Articles and Announcements

en-tel-e-chy
unlocking potential

Welcome to Entelechy
unlocking Potential™

Better Performance Through Better Training

Need new Entelechy programs updated quickly at these critical moments?

Since 1992, Entelechy™ has been helping hundreds of companies across the globe to unlock the potential of their managers and employees through our unique approach to training and development — an approach that offers the advantages of customized training at public service prices.

We believe that great management, sales, customer service, and facilitation skills are essential. It is the application of those skills that separates exceptional performing leaders and business environments. We work with you to identify your business and performance goals, then draw from our 20+ years of experience to design, develop, and deliver customized training solutions that drive your business and create a performance level of excellence that will exceed your expectations.

Because the training is created for your company, Entelechy subscribers can use the training as one tool to address your company — without adding another charge to the bill.

In this challenging economy, you need to unlock the full potential of your managers and employees. Entelechy's customized training is the solution you need.

Logos for DIRECTV, WELLPOINT, and KONE are visible.