

COURSE WORKBOOK



CMI Level 5 in Professional Coaching Practice

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INTRODUCTION TO WORKBOOK

The workbook is designed to complement the material in the online live sessions of the Coaching and Mentoring course (CMI Level 5). It provides some additional detail on some specific issues related to each course topic together with reflective questions.

The reflective questions broadly follow the order of subjects in the training (as they are related to an aspect of each topic) and we recommend that, if possible, you work through the relevant sections after each day of the course.

We also suggest that you revisit the workbook questions a few weeks after the course.

1 –THE DIFFERENCES AND SIMILARITIES BETWEEN COACHING AND MENTORING



During the training, we have emphasised that the quality of your coaching is the quality of your questions. The coach does not necessarily have to be more experienced than the person receiving coaching – their questions help clarify goals, the current reality, the options for improvement and the specific way forward.

A mentor will use some or all of the questioning skills that a coach would use, but some people argue that there are some significant differences in approach between mentoring and coaching. For example, the mentor will usually be more experienced than the mentee.

Sometimes, people find a mentor informally; many organisations have formal mentoring programmes particularly for new recruits or those in new positions. Although a manager can use mentoring skills, formal mentorship programmes usually provide mentors outside the recipient's line management chain so the mentee can feel free to open up about issues that they might not want to share with a line manager.

It is worth noting that some organisations make use of 'reverse mentoring'. This is defined by more junior employees acting as a mentor to senior leaders or executives. This helps the senior leader gain a better perspective of the approach, needs and concerns of those in more junior roles. Sometimes it is used to help the senior leaders better understand a specific area of work, such as new technology.

The extract from an article below gives an interesting perspective on the difference between mentoring and coaching:

'What is the difference between mentoring and coaching?'

by Dr. Michael Wolter

Program Director and Associate Professor of Management and Leadership

Mentoring has some overlap with coaching, but the difference is important. A mentor is a more experienced individual willing to share knowledge with someone less experienced in a relationship of mutual trust" (David Clutterbuck, 2019). Like coaches, mentors provide guidance and support, but focus on the mentee as a whole, rather than on a specific ability or skill. Mentors approach the development their mentees holistically, considering what drives them and what challenges they might face on the path to their mutually agreed upon goals.

"In addition to providing input and education on skill and ability development, mentors help their mentees expand their understanding of the 'culture' of their organization of membership, help to instil attitudes and values that will benefit the mentees, and through teachable moments, provide opportunities for them to grow through self-discovery.

To be successful as a mentor, one must have and develop:

- Commitment to learning and helping others learn
- Strong listening skills
- Empathy
- Rapport building
- Encouragement, especially helping the mentee to share and open up
- Observation and reflection on mentees' actions, as well as their own, for growth purposes
- Ability to provide teachable moments
- Self-awareness, self-reflection, and understanding what motivates and challenges others
- Ability to see life experiences as sources of wisdom and knowledge
- Examining the mentee's perspectives, thinking, and biases
- Understanding of organizational politics
- Willingness to share positive and negative life experiences
- Allowing the mentee to succeed or fail for learning experiences
- Relationship management in addition to the mentee's goals

Simply put, mentors offer their vast knowledge, expertise, experience, and advice to those under their guidance. By leveraging their life experiences and skills, mentors guide mentees in a direction aligned with their goals. Mentors consider all elements of their mentees' lives when observing, assessing, and supporting them. Mentors assist mentees in considering unrecognized opportunities as career growth, confidence development, self-reflection, and interpersonal skills improvement. The support is based on mentors' own life experiences, beliefs, and values.

Extracted from: <https://www.goodwin.edu/enews/faculty-article-coaching-vs-mentoring/>

Question for Reflection

The article extract above has focused on mentoring. Please use the space below to note in detail what you think coaching and mentoring have in common.

2 – THE BUSINESS CASE FOR MANAGEMENT COACHING AND MENTORING



Before considering the reflective questions for this topic, please read the extract below from an article at <https://www.charmhrm.co.uk/current-news/learning-development-news/modern-management-the-business-case-for-introducing-coaching>

Introducing a coaching culture is not a 'nice to have'. It has clear, measurable business outcomes that demonstrate how it will impact positively on achieving the Company's goals and improving its performance. Introducing a coaching culture will [help] employees to:

- Ceaselessly identify better ways of doing things
- Change roles and develop competence more rapidly as the business changes
- Share both new and old knowledge whenever it is needed
- Understand the importance of continuous personal improvement and how to go about it
- Have access to learning from others whenever they need it
- Be completely clear about how what they do makes a difference and contributes to the business strategy
- Be completely clear about what difference means in terms of current and future performance and development
- Challenge their colleagues and themselves to live up to the best they can become
- Feel that they have a long-term future with the Company.

Questions for Reflection

1. What business benefits for coaching would you add to the above list?
2. Which of the above business benefits also apply to mentoring and what else would you add to it (and what you have written in response to question 1) for mentoring?

3 – DIFFERENT APPROACHES TO COACHING AND MENTORING (DIRECTIVE VS NON-DIRECTIVE)



A Key Distinction – Directive Vs Non-Directive

The extract below is from <https://www.vitae.ac.uk/doing-research/leadership-development-for-principal-investigators-pis/developing-individual-researchers/mentoring-and-coaching-researchers/approaches-to-coaching-and-mentoring>

We will explore non-directive approaches in depth on Day 2 of the programme. Generally, coaches are encouraged to be non-directive whereas mentoring may be more likely to include both approaches.

Directive mentoring and coaching

A directive approach involves a transfer of wisdom, where the mentor or coach provides advice or direction, probably based on their experience and expertise. This is a widely-recognised, fairly traditional approach.

Advantages include:

- mentee benefits from shared experience
- mentee benefits from mentors' hindsight
- mentee can be given a solution
- mentor feels rewarded by sharing wisdom.

Disadvantages of directive approach:

- mentee has less ownership of outcomes
- mentee may be less committed to action
- the solution might not be 'right'.

Non-directive mentoring and coaching

A non-directive approach allows the recipient to formulate their own solutions and actions as a result of skilled listening and questioning from the mentor or coach.

Advantages of non-directive approach for the mentor or coach:

- mentor/coach does not need to be an expert in the field
- mentor/coach is open-minded and asks open questions
- mentee/coachee has ownership of the solution
- mentee/coachee has greater commitment to action
- the solution is more likely to be 'right'.

Disadvantages could be:

- longer time to reach an outcome
- missed opportunity to benefit from another's experience
- mentee/coachee may simply want to be given the answer."

Questions for Reflection

Above we have explored non-directive and directive approaches. There are other differences between the various coaching and mentoring approaches.

Please reflect, research and write your responses to these four questions below:

1. What do the different approaches to coaching have in common?
2. What do the different approaches to mentoring have in common?
3. What are your thoughts on any other distinctions between approaches (besides non-directive and directive)?
4. Which approaches do you favour? How would you describe your style?

4 – DIFFERENT TOOLS AND TECHNIQUES REQUIRED FOR COACHING AND MENTORING



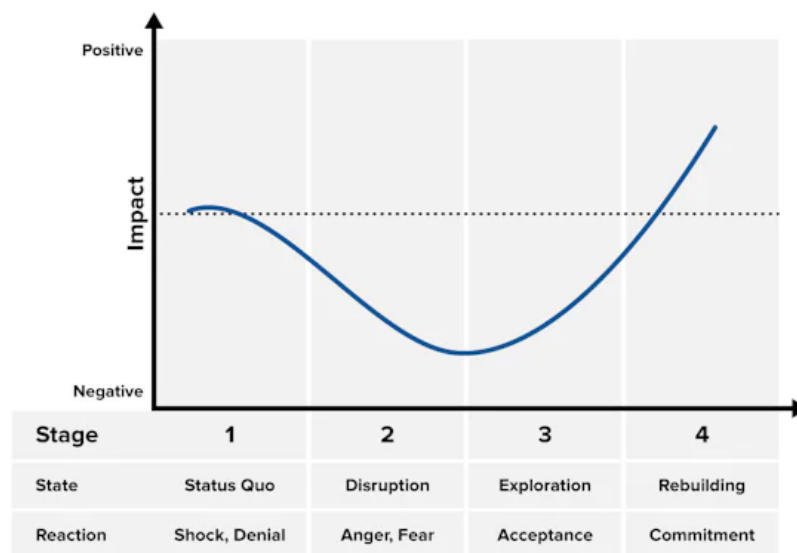
Below is a list of skills mentioned on the course so far (in no particular order)

- Active listening
- Using questions
- Maintaining focus and helping others do so
- Helping people clarify their understanding (context, options, necessary actions etc)
- Helping people overcome self-imposed limits and external challenges
- Helping people to see other interpretations of a situation
- Acting as catalyst for finding solutions
- Giving constructive feedback/ enabling constructive self-assessment/ receiving feedback
- Empathy
- Rapport
- Delegation (e.g., as manager)
- Supporting strategic thinking
- Etc.

Question for Reflection

For each of the skills listed above, please write a specific example of how it might be applied in practice (i.e. a technique for applying the skill)?

5 – SUPPORTING A COACHEE OR MENTEE TRANSITION THROUGH CHANGE



“With knowledge of the Change Curve, you can plan how you'll minimize the negative impact of the change and help people adapt to it more quickly”

(From <https://www.mindtools.com/au03rgg/the-change-curve>)

“Coaching people through change takes time and patience, but it can really pay off in the long run. Coaching can:

- Encourage people to see change as an opportunity rather than a threat.
- Help people understand and embrace change.
- Build a stronger and more communicative team, where everyone knows their role and their value to the organization.
- Identify training needs and develop talent.
- Prevent negative perceptions of change from getting out of control and spreading across a team.”

(From <https://www.mindtools.com/agjj594/coaching-through-change>)

The Kubler-Ross Change Curve

There are various models for mapping how people transition through change, one of the best known is that created by Dr Elisabeth Kubler-Ross in the 1960s. (These models are best used as frameworks to help understand a process that people will experience differently as individuals, remembering the famous quote by Alfred Korzybski – “the map is not the territory”.) Originally developed to demonstrate the stages of grief, it was later applied to

people's reaction to significant change or upheaval (including organisational change). The insights can be applied to individual and team reactions to change. The extract below from www.mindtools.com explains their perspective on the stages of the model in the context of people's reaction to organisational change:

Stage 1: Shock, Denial

When a change is first introduced, people's initial response may be shock or denial, as they react to the challenge to the status quo. This is stage 1 of the Change Curve.

Stage 2: Anger, Fear

Once the reality of the change starts to hit, people tend to react negatively and move to stage 2 of the Change Curve. They may fear the impact, feel angry, and actively resist or protest against the changes. Some will wrongly fear the negative consequences of change. Others will correctly identify real threats to their positions. As a result, the organization experiences disruption which, if not carefully managed, can quickly spiral into chaos.

For as long as people resist the change and remain at stage 2 of the Change Curve, the change will be unsuccessful – at least for the people who react in this way. This is a stressful and unpleasant stage. For everyone, it is much healthier to move to stage 3 of the Change Curve, where pessimism and resistance give way to some optimism and acceptance.

Stage 3: Acceptance

At stage 3 of the Change Curve, people stop focusing on what they've lost. They start to let go and accept the changes. They begin testing and exploring what the changes mean, and so learn the reality of what's good and not so good, and how they must adapt.

Stage 4: Commitment

By stage 4, they not only accept the changes but also start to embrace them: they rebuild their ways of working. Only when people get to this stage can the organization really start to reap the rewards of change.

Applying coaching and mentoring skills, particularly listening, can help people work through their reaction to change. It is important to realise that different skills will work best at different stages – a particular stage might require that you focus on listening and demonstrating empathy. Another stage might involve questions that help people reframe the situation as an opportunity rather than a threat. Yet another stage might involve questions that help the coachee or mentee generate options and solve problems. Questions may also help facilitate action planning in response to the change. Different people will work through the stages in different ways. Some may move through a stage extremely quickly, others may remain in a particular stage for a long time. The reflective questions below invite you to reflect on the approaches you might take at each stage of people's reaction to change using the Kubler-Ross cycle (or if you prefer, a different model).

Questions for Reflection

1. How might you help
 - a. A coachee
 - b. A mentee transition through the different stages of change?
 - c. What might be good questions to ask at each stage?

6 – EFFECTIVELY USING QUESTIONS AND SILENCE



Good coaching (and mentoring) questions achieve the following:

- Generate curiosity in the listener
- Stimulate reflective conversation
- Provoke thought
- Bring to the surface underlying assumptions
- Invite creativity and new possibilities
- Generate energy and forward movement
- Channel attention and focus inquiry
- Stay with participants (do not move too far ahead of where the listener is)
- Evoke more questions

(List edited and adapted from <https://positivepsychology.com/coaching-questions/>)

Questions for Reflection

1. What would you add to the features of good coaching and mentoring questions listed above?
2. From the course discussions, and your own reflection, what should coaches and mentors avoid in how they ask questions?

7 – BUILDING RAPPORT, SHOWING EMPATHY AND PROBLEM SOLVING



Please read this article extracted from a factsheet at <https://app.croneri.co.uk/topics/coaching-and-mentoring/employer-factsheet-coaching-skills-building-rapport> and then consider the reflective question for this topic:

Rapport is the state of feeling relaxed with and responsive to another person. Building good rapport is essential to an effective coaching or mentoring relationship, as the coachee or mentee can only fully benefit from the relationship when they trust and have rapport with their coach or mentor.

Rapport is built through a number of different factors.

- Trust — the coachee/mentee is confident that the coach/mentor is reliable and will respect confidentiality and is confident that the coach/mentor has the coachee's/mentee's best interests and agenda at heart.
- Focus — attention is concentrated totally on the coachee/mentee and the coach/mentor listens without making judgments.
- Empathy — the coach/mentor understands and respects the coachee/mentee's feelings, perspective and motivations, while placing themselves in the other person's shoes.
- Congruence — the coach/mentor's actions mirror what they say, and there is mutuality of objectives and goal (both coach/mentor and coachee/mentee are united in pursuit of the coachee/mentee's goal).
- Empowerment — the coach/mentor provides positive support and encouragement, which enables the coachee/mentee to build confidence in their own abilities.

Rapport cannot be created artificially, but the coach or mentor can do things to accelerate the process of building a genuine rapport. These include:

- ensuring a positive environment for the meetings — a comfortable space without interruptions, that encourages both people to relax and focus
- demonstrating interest — making eye contact and leaning forward when listening help make the coachee/mentee feel understood
- active listening — playing back and clarifying what has been said, as this demonstrates that the coach/mentor has been listening
- using similar language — creates a mirroring effect that makes the coachee/mentee feel that the coach/mentor is on the same wavelength
- sharing own experiences — the coach/mentor sharing an experience from their past can help build rapport, if it demonstrates a similarity with the coachee/mentee.

Question for Reflection

How might establishing a rapport and demonstrating empathy support problem-solving, as a mentor or coach?

8 – REFLECTION ON PRACTISING THE SKILLS



“Questions hold the power to cause us to think, create answers we believe in, and motivate us to act on our ideas. Asking moves us beyond passive acceptance of what others say, or staying stuck in present circumstances, to ... applying our creative ability to the problem.”
Tony Stoltzfus, ‘Coaching Questions: A Coach's Guide to Powerful Asking Skills’

“Asking the right coaching questions means the difference between a one-way interrogation and a dynamic learning session. Good coaching questions give someone who’s busy and competent the space in which to step back and examine herself. The right question can stop her in her tracks as she finally sees her own actions from a different perspective or envisions a new solution to an old problem. She may indeed learn to question herself so that next time she can catch herself in the act and change her actions in the moment.”

Amy Jen Su, <https://hbr.org/2014/12/the-questions-good-coaches-ask>

“Powerful questions we can define as ones that have a significant, positive impact on the quality and direction of a person’s thinking about issues important to them. Based on analysis of hundreds of powerful questions and observing how coaches and mentors use them, the characteristics of a powerful question include being:

- **Personal** – it is about them, or about how they connect to an issue
- **Resonant** – it has an emotional impact
- **Acute/ Incisive** – it gets to the heart of the issue
- **Reverberating** – it stimulates reflection both in the moment and for some time afterwards
- **Innocent** – the intent of the questioner is not self-interested or derived from an agenda of their own
- **Explicit** – clearly and explicitly expressed

These characteristics make a convenient acronym – PRAIRIE.”

David Clutterbuck <https://davidclutterbuckpartnership.com/what-makes-a-powerful-question/> and video at https://www.youtube.com/watch?v=QXU-tAkz_TY (‘Powerful Questions with Professor David Clutterbuck’)

This part of the workbook invites you to reflect back on the coaching exercises in the course

Questions for Reflection

Reflecting back on the coaching questions exercises:

1. What types of questions worked best in practice and why?
2. What types of questions did not work so well and why?
3. Any other learning from the exercise?

9 - NAVIGATING RELATIONSHIPS AS A MANAGER, COACH AND MENTOR

Mentoring

A mentor can help you to:	Benefits of mentoring include:
• consider new ways of working • see things from a different perspective • gain valuable advice and guidance from a more experienced colleague • develop your knowledge and skills in a specific area • improve your communication skills • build your professional network	• increased self-confidence and motivation • a sounding board to discuss ideas and approaches before you take action • an opportunity to think about things in a different way • having career conversations beyond your line manager

A mentor is often an experienced individual willing to share knowledge with someone less experienced in a relationship of mutual trust. As a mentee you should demonstrate an interest in self-development.

Coaching

A coach can help you to:	Benefits of coaching include :
• Develop in a specific area or overcome a specific issue • Navigate through difficult career decisions • Improve your self awareness • Increase your confidence and resilience • Establish your career path and set realistic goals that enable you to get there • Recognise your professional value, strengths and weaknesses • Be accountable and keep motivated	• Increased creativity and creative ideas • Encouraging you to become more self-reliant • Enabling greater ownership and responsibility

A coach is someone who has been trained in helping other people develop career goals and will determine, with a person, where they would like their career to go and to develop a plan achieve those goals.

Role of coachee

During the coaching:	After the coaching:
● Be yourself ● Focus on getting real value from the coaching - do not think about what the coach is doing (yet) ● Don't try to artificially help the coach. Let them structure the conversation. ● Use a real issue. Either one you prepared or anything else which seems more relevant now.	● Think about what the coach did in relation to the GROW model (do not focus on the content) ● Give feedback highlighting the one biggest strength and the one biggest development area

Role of coach

During the coaching:	After the coaching:
● Stick to using the GROW model... ● AND make adaptations to meet the needs of the coachee ● Be yourself ● If you have a question or want help, raise your hand ● Take risks and try new things (so that you learn)	● Receive feedback ● Take notes on the parts you want to remember

(G):Goal**Objective:**

- Establish the goal. Listen to what the coachee wants to change, and then structure this change as a goal that he/she wants to achieve

Strategy:

- Ask questions to establish what the coachee wants to achieve

(R): Reality**Objective:**

- **Describe the reality of the situation(s) today.** The aim is to get the coachee to articulate the 'here and now' so that s/he can map out the journey ahead

Strategy:

- Encourage objectivity, detachment and description, rather than judgment
- Focus on the impact of the issue on the coachee

Tip: Don't go too deep here!

(O): Options

Objective:

- Determine the options. It's time to determine what is possible - meaning all the possible options for reaching the coachee's goal

Strategy:

- Open brainstorming
- Go for QUANTITY of options vs. quality or feasibility first
- (you can evaluate the options later)
- If stuck, go back to Goal or Reality insights

(W): Will

Objective:

- Commit to action. Get the coachee to commit to specific actions in order to move forward towards his/her goal. In doing this, you will help them establish their will and boost their motivation

Strategy:

- Work towards commitments that support the Goal and are specific and measurable
- Coach can offer a challenge to push things further - coachee has the right to say "yes", "no" or "counter-offer"

Listening

Level 1: Empathetic listening (preoccupied) "I haven't time for this"

The listener is concentrating on another activity or thought, and occasionally acknowledges the person speaking. Typically, the listener's eyes wander, they fiddle with things, shuffle feet, glance at a watch etc.

"I'll fix it for you"

The listener interrupts, argues, provides advice and continues providing advice despite resistance from the teller. The listener tries to solve the problem, offers advice, or takes action before asked.

"I have ways of making you talk"

The listener asks question after question. If the questions are closed, the teller is likely to provide one-word answers. Open questions elicit more information. But rapid-fire use of open questions will start to feel like an interrogation. Less information, more resistance and less willingness to return are likely to be displayed

“I’ve met your type before”.

Listener has assessed the teller, prior to the dialogue, or within minutes. Hears and interprets messages to support this listening through distorted filters of personal prejudices and stereotyping.

“I feel your pain”

Rather than aiming for empathy and understanding, the listener over-sympathises. ‘I would have done the same...’ The listener does not explore the whole picture and the possible negative consequences of the behaviour for the teller or others. The limitations of this are poor disclosure and inaccurate information.

“I’m too busy for this”“You will answer my questions”“I know what you are like”**Level 2: Listening to content**

The desired outcome of listening is to hear facts. The listener:

- Is aware of the need to listen
- Limits distractions and finds a private area for discussion
- Prepares, as far as possible, to ensure the environment is conducive to listening, for example arranging the chairs at a 45o angle rather than directly opposite each other. Ensures there are no barriers between the listener and teller, such a screen or a table
- Hears and notes only the facts of what the teller is saying

Level 3: Active listening

The desired outcome is to build on content-listening, to facilitate disclosure, and to gain understanding. The listener:

- Concentrates on what the teller is saying rather than the next question, or on offering solutions or advice
- Unconsciously mirrors some body language, where the teller is willingly and calmly providing information
- Displays similar rhythm in the movements, to the teller, (almost like a dance)
- Becomes expressive and good-humoured, as does the teller, who then wants to provide information freely

Level 4: Empathetic listening

The desired outcome is to build on active listening and gain a clear accurate understanding of **S A M E**

Situations described

Actions

Mental state – thoughts and feelings

Experience of all involved

In addition to hearing what is said the listener notices detailed non-verbal reactions and reflects understanding of these to gain accurate empathy.

They notice:

- Deletions and generalisations made by the teller
- Changes in body movements and posture and rhythms
- Changes in facial expression smiles, frowns, raised eyebrows
- Changes in eyes
- Changes in automatic responses – breathing, blushing, paleness
- Vocal qualities – tone, volume, speed, pauses, silence
- Ambiguity of meaning
- Indications of feelings

Level 5: Listening to develop discrepancies

The desired outcome is to build on the S A M E listening described above, so as to understand core values and beliefs that initially may be unconscious to the teller.

In addition to listening skills the listener reflects the meaning, feeling and discrepancies they have perceived, to check out they have understood correctly.

Listening with your eyes.

Tips for more effective listening

Listening is especially important because it is the quality of that listening that will help the client tell their story. You must understand what it is like to be them in their job and in their life outside of work.

1. Relax briefly before each session, where possible. Clear your mind of current problems and stresses.
2. Have a gap of a few minutes between sessions or between a meeting and a coaching / mentoring session.
3. Look at the notes from previous encounters to focus your mind on that particular client's needs and actions.
4. Take notes so that you can see patterns of behaviour emerging and so that you can recap where necessary.

5. If issues not related to the session come to mind write them down at the top of the page.
6. Constantly ask “How would you feel to be them, going through that?”

See Annex 4 for a list of questions that can help within a coaching and mentoring context.

Over to you

Let's do some self-reflection

- Read the blog ‘Line manager, mentor and coach: managing the conflicts and capitalizing on the opportunities’ <https://davidclutterbuckpartnership.com/line-manager-mentor-and-coach-managing-the-conflicts-and-capitalizing-on-the-opportunities/>
- Make a list of words, phrases and traits that describe you best:
 1. As you see yourself
 - i. I am.....
 2. The view of a superior at work
 - i. You are.....
 3. The view of a relative or partner
 - i. You are.....
- Let's start our listening exercise. The listening ghost exercise in groups of 2. One person tells an emotional story for 3 minutes. The Coach listens and then summarises the story.

Guidelines

- Listen, while your partner talks about an important and emotional experience. Once they are finished coaches should summarise one of two things:
- Name the feeling: e.g.. ‘that sounds like you were really excited’
- Check the facts: e.g.. ‘so you tried to go back three times’
- As a coach you are listening to:
 - What is being said
 - How it is being said
 - What is not being said
- As a coach you are demonstrating:
 - Your attentiveness
 - Your respect for the other's point of view or efforts
 - Your understanding of what is being said

True listening is an active, highly focused activity. You do not come across it much in ordinary life. People are often only half-listening to you and filling the blanks in from

their own preconceptions and prejudices. Many factors stop us listening fully. As a result, we only get half of the picture and the person talking to us feels short changed

Listening exercise

Think of an important and impactful experience you have come through and are prepared to talk about to a partner. Use this page to help collect your thoughts.

What is your story?

What happened?

What were all the feelings you experienced?

How do you feel about it now?

What might you try next time?

Tell each other the story and reverse the role. Use the prompt below to record the main points of the feedback you have received around your coaching practice. This will help you set development goals for your coaching moving forward. Make notes - with specific examples or even the exact words used.

Your reflections as the listener (coach):

What worked?

What worked less well?

What might you try next time?

Your reflections as the storyteller: Make notes - with specific examples or even the exact words used.

How did the coach open the session?

What techniques were used?

What worked?

What worked less well?

What would have been helpful?

10 – SELF AWARENESS OF PSYCHOLOGICAL UNDERPINNINGS OF COACHING & MENTORING

Personality Type Theory

Understanding personality is a key coaching skill. Personality type theories develop self-awareness for both you as a coach / mentor and your coachee's / mentees. In your coaching practice you will work with a variety of people, all of whom are different, all of whom have their own value, strengths, and qualities, and should be treated with respect.

There are many personality type theories, and the more models you understand, the better you can appreciate different behaviours and motivations.

The Big Five

The Big Five Model, also known as the Five-Factor Model, is the most widely accepted personality theory held by psychologists today. The theory states that personality can be boiled down to five core factors, known by the acronym CANOE or OCEAN:

Conscientiousness

impulsive, disorganised vs. disciplined, careful

Agreeableness

suspicious, uncooperative vs. trusting, helpful

Neuroticism

calm, confident vs. anxious, pessimistic

Openness to Experience

prefers routine, practical vs. imaginative, spontaneous

Extraversion

reserved, thoughtful vs. sociable, fun-loving

Unlike other trait theories that sort individuals into binary categories (i.e. introvert or extrovert), the Big Five Model asserts that each personality trait is a spectrum.

Therefore, individuals are ranked on a scale between the two extreme ends.

Myers-Briggs Type Indicator (MBTI)

The MBTI is a tool which enables individuals to identify their psychological preferences: -

- Introversion or Extroversion
- Sensing or Intuition
- Thinking or feeling
- Judging or Perceiving

The MBTI was developed by Katherine Briggs and her daughter Isabel Myers and is based on Carl Jung's work explained in his book "Psychological Types" published in 1923. There is some correlation to four of the Big Five personality traits as outlined above.

Developing a Growth Mindset



A growth mindset, proposed by Stanford Professor Carol Dweck in her book 'Mindset', describes people who believe that their success depends on time and effort. People with a growth mindset feel their skills and intelligence can be improved with effort and persistence.

Having a growth mindset (the belief that you are in control of your own ability and can learn and improve) is the key to success. Hard work, effort, and persistence are important, but not as important as having that underlying belief that you are in control of your own destiny.

How to develop a Growth Mindset?

1. Step 1 – Listen to yourself – when you have a fixed mindset, it will be saying "I don't have the skills for this project/task", "What if I fail, what will others think of me?", "What if I get negative feedback?"
2. Step 2 – Recognise that you have a choice – everyone faces obstacles, challenges, and failures, it's how you respond to them that makes the difference. If you see failure as proof that you are not good, you're in a fixed mindset. If you look at them as opportunities to learn, then you have a growth mindset

3. Step 3 – Challenge your fixed mindset – move from "I'm not sure I can do this. I don't think I'm smart enough," to "I'm not sure if I can do it and I may not get it right the first time, but I can learn with practice."
4. Step 4 – Act – with the growth mindset you can then have a go at doing things differently, knowing that it won't be perfect the first time, but that everything is an opportunity to learn

Negative The first stage is to recognise your own automatic thoughts whenever you feel anxious. In order to identify them, keep these characteristics in mind:

Wrong labels

Anxious people will often say "I was in a complete panic" when in fact they were quite anxious but nowhere near the state of extreme fear which denotes panic.

All or nothing

There is sometimes a tendency to see things as being a total success or total failure, when in fact most situations are somewhere in between. Just because something has gone wrong does not necessarily mean that the whole event is a total disaster. Try to be rational about it

Over generalising

Do not make the mistake of thinking that because you had one bad experience in a situation that all similar situations will be equally bad, or that you will always have a bad experience in similar situations. Just because you got extremely nervous meeting new business contacts recently does not mean that all business meetings will be the same

Exaggerating & catastrophising

- This means blowing things out of all proportion and assuming that the worst possible disaster is bound to happen in a situation you find difficult
- Someone who is self-conscious about blushing might imagine a forthcoming social event in terms of them blushing, everyone else noticing, and then everyone talking about them in a critical or ridiculing manner.

Over to You

- Now let's look at your views in more detail.

Complete each sentence about problems	
1.	My biggest problem is
2.	I'm quite concerned about
3.	Something I do that gives me trouble is
4.	Something I fail to do that gets me into trouble is
5.	The social setting I find most troublesome is
6.	The most frequent negative feelings in my life are
7.	These negative feelings take place when
8.	The person I have most trouble with is
9.	What I find most troublesome in this relationship is
10.	Life would be better if
11.	I don't cope very well with
12.	What sets me most on edge is
13.	I get anxious when
14.	A value I fail to put into practice is
15.	I'm afraid to
16.	I wish I
17.	I wish I didn't

18. What others dislike most about me is
19. What I don't seem to handle well is
20. I don't seem to have the skills I need in order to
21. A problem that keeps coming back is
22. If I could change just one thing about myself, it would be

Turing to the positive

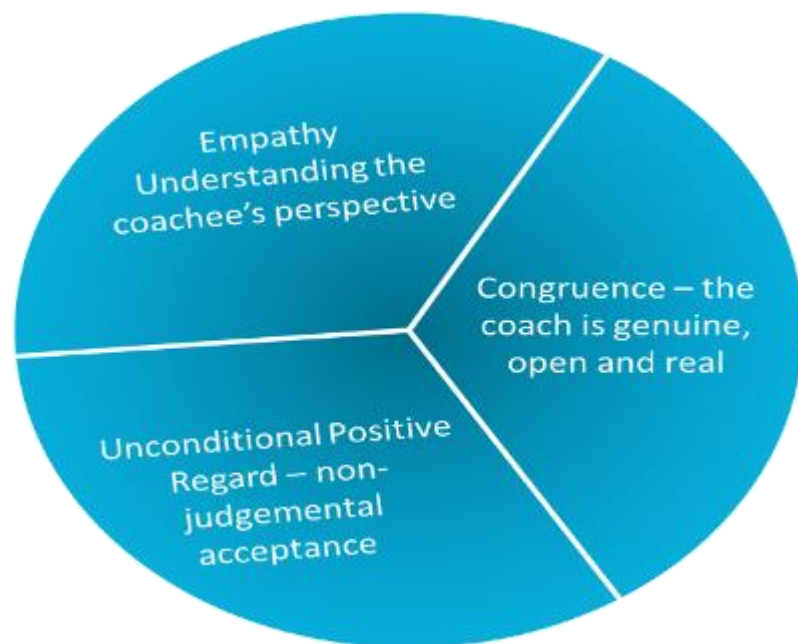
Complete the sentence about your personal strengths
1. One thing I like about myself is
2. One thing others like about me is
3. One thing I do very well is
4. A recent problem I've handled very well is
5. When I'm at my best I
6. I'm glad that I
7. Those who know me are glad that I
8. A compliment that has been paid to me recently is
9. A value that I try hard to put into practice is
10. An example of my caring about others is
11. People can count on me to

12. They said I did a good job when I
13. Something I'm handling better this year than last is
14. One thing that I've overcome is
15. A good example of my ability to manage my life is
16. I'm best with people when
17. One goal I'm presently working towards is
18. A recent temptation that I managed to overcome was
19. I pleasantly surprised myself when I
20. I think that I have the courage to
21. If I had to say one good thing about myself I'd say that I
22. One way I successfully control my emotions is
23. One way in which I am very dependable is
24. One important thing that I intend to do within two months is

11 – DEALING WITH JUDGMENT: CREATING A SAFE SPACE

Unconditional Positive Regard

Carl Rogers was among the founders of the humanistic approach in psychology and this person-centred approach is a key foundation of the coaching relationship.



Carl Rogers - 1957

Unconditional Positive Regard is the acceptance and support of a person, regardless of what they do or say. Rogers believed that unconditional positive regard is essential for healthy development. Through providing unconditional positive regard, coaches seek to help their clients accept and take responsibility for themselves. Humanistic psychologists believe that by showing the client unconditional positive regard and acceptance, the coach is providing the best possible conditions for personal growth to the client.

Unconditional positive regard is not about liking a client or accepting everything they have done; it's about respecting the client as a human being with his or her own free will and operating under the assumption that he or she is doing the best they can.

Having this attitude toward a coachee can encourage them to share their thoughts, feelings, and behaviours more openly with the coach.

A coachee who is afraid the coach/ mentor will be shocked, offended, or judgmental will likely not be very forthcoming with any information that they feel may be perceived as negative or unacceptable. Any withholding of important information can have a very negative impact on the coaching relationship and, in turn, on any progress and development that the coachee is looking to gain from the coaching relationship.

Personal Values

Our Personal Values are our personal 'bottom line'. These are those things in life which are most important to you. They could be beliefs, people, ways of operating or thinking but, when it comes to making an important decision, these are the things which will be most influential in terms of the choices you make. See a list of values in the table below.

Values

Honesty / integrity	Truth	Dependability
Independence	Intelligence	Recognition
Challenge	Decisiveness	Achievement / success
Competence	Respect	Diversity
Harmony	Security	Autonomy
Simplicity	Courage	Open-mindedness
Effectiveness	Discipline	Teamwork
Creativity	Patience	Variety
Spirituality / faith	Service	Risk taking
Prosperity / wealth	Productivity	Power
Hope	Growth	Freedom
Equality	Flexibility	Beauty

Health	Innovation	Communication
Empathy	Competition	Love / affection
Wisdom	Quality	Curiosity
Family / friendship	Loyalty	Strength

Unconscious Bias

Many of these biases stem from a time when we were living in a primitive, dangerous world. Humans learnt very early on that it was safer to be with similar creatures. In prehistoric times, those who ventured far did not return. Society may have moved on, but the primitive part of our brains (The Limbic System) still gravitate towards people and things that are similar. These instincts are experienced as unconscious biases.

Some of these biases include:

1. **Conformity Bias** – going along with the majority view, commonly known as ‘group think’. Many people are uncomfortable being a lone voice, so we tend to conform to a widely held view, even if we think differently. Consider the fable: “The Emperor’s New Clothes!”
2. **Beauty Bias** – assuming that taller, more physically attractive people are more intelligent or capable. 58% of Fortune 500 CEOs are six feet or taller (compared with 15% of all men) and 30% are 6’2” or taller (compared with 4% of all men).
3. **Affinity Bias** – when someone else has something in common with us, we make lots of other assumptions about how they are similar to us, based purely on this one aspect. Consider how you respond when you find out a stranger is from your hometown, for example.
4. **Halo Bias** – if someone is introduced to you with a positive reputation, or the first thing we see from them is high performance, or something else of which you approve, you are more likely to see their future behaviour through this lens, forgiving poor conduct as a lapse.
5. **Horns Bias** – this is the opposite of the above bias. Consider the child who misbehaves the first time they are in a new class. The teacher will almost certainly conclude that they are ‘trouble’ and will watch them closely!
6. **Similarity Bias** – we also tend to like those who are like us, this could be physically, socially, culturally etc. Conversely, we can fall into the trap of excluding those who are not like us, or not asking those who are different for their perspective.

7. **Contrast Bias** – there is a saying that “in a blind world, the one-eyed man is King”. This exemplifies this bias; our perspective on things can be dramatically altered by the context. How do you sell a £10k Rolex? Put it next to one priced at £100k!
8. **Attribution Bias** – if another person is successful, we might attribute that to circumstances, rather than skill. Whereas, if we were successful in a similar situation, we would be more likely to claim it was due to our innate ability, rather than luck.
9. **Confirmation Bias** – once we have made our minds up about something, we tend to only notice information which confirms what we already think, whilst ignoring anything which challenges our viewpoint.

Over to you

Values

1. Read the list of values above and highlight the personal values that resonate most with you. Use the list of values in the table above to pick your top 5 personal values, and then your top value. Once you have completed the exercise, write down the five values you have chosen below, with your top value in the top box.

My personal values:

My top value:	1.		
2.	4.		
3.	5.		

Let's delve deeper into this topic.

How do your top values support you as a coach / mentor?

Where may your values challenge your ability to be an effective coach /mentor?

How would you deal with a coachee / mentee who has opposite values and beliefs to you?

Which biases do you think you might be most likely to have?

What could you do to make sure that you do not allow these biases to affect your judgement of others?

Can you think of examples of receiving 'expert advice' or 'well-meaning advice'? Did you act on them? Why or why not?

12 - MATCHING INDIVIDUAL LEARNING STYLES TO PERSONALITY TRAITS

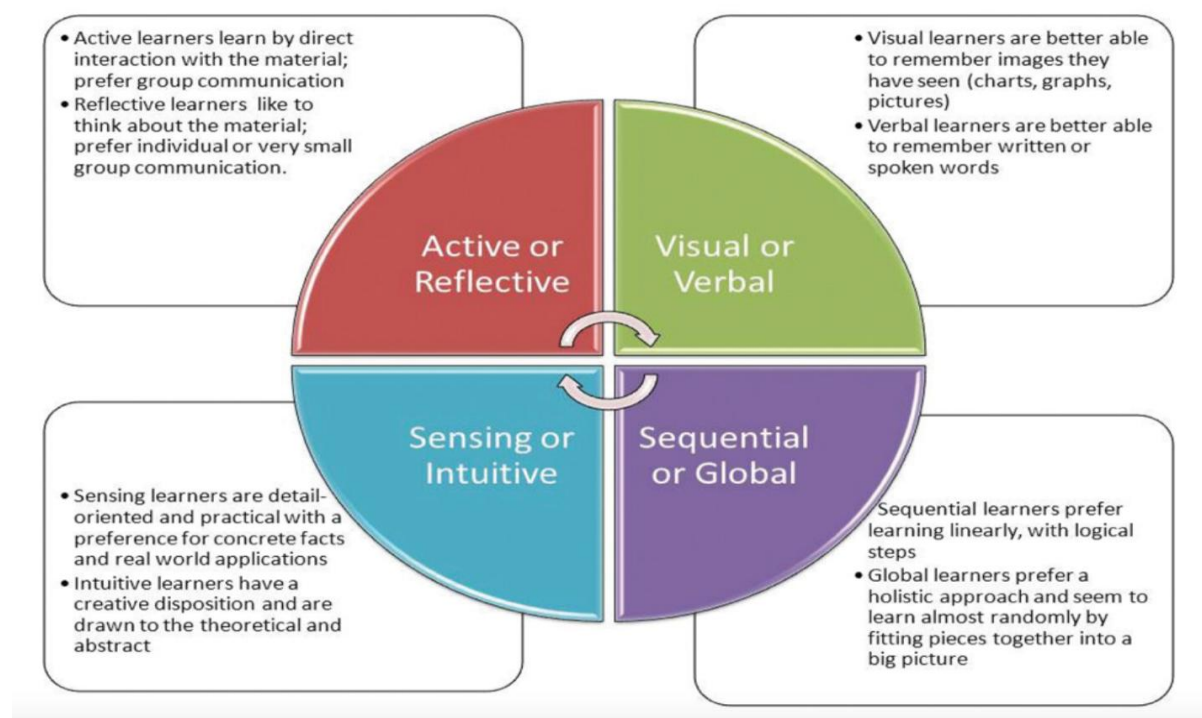
The concept of learning styles refers to consistent differences in how individuals engage with learning content (Adey, Fairbrother, & William, 1999) and is widely used both in education and training.

People have different strengths, talents, work styles and interests and learning style and questionnaires can help us determine how a person processes information (Honey & Mumford, 1992). Johnson (1996) became aware of the connection between certain personality traits and learning styles. His research demonstrated that underachievement in academic performance can be in part attributed to educators not fully understanding / using these styles to inform how they developed and delivered their interventions.

In Index of Learning Style, Felder and Silverman (1988) provided four dimensions of learning styles including sensing-intuitive, visual-verbal, active-reflective and sequential-global.

Understanding Learning Styles and Coaching / Mentoring

This in turn potentially enables us as coaches to tailor our coaching session according to the individual's requirement. The idea of learning styles is helpful if used as a conversation starter. It can be extremely useful, as long as we consider it within a holistic enquiry of them as a person. Individuals are complex and there are many factors at play be they biological, socio-economic or psychological. It's therefore most helpful in a coaching situation to present information in as many different and challenging ways as possible (Bailey & Schwartzberg, 2003). The approach to Learning Styles and the type of activities that tend to work best with people who have that style are detailed in the graphic below.



Over to you

Reflect on the questions below and make notes. We're also going to look at how you might approach coaching - your preferences and style.

Read this article 'Why you should incorporate learning styles into coaching sessions'
<https://www.emergeuk.com/implementing-a-coaching-culture/incorporate-learning-styles-coaching-sessions/>

What are your reflections on the issues raised by this article?

Do you know how you learn best? Note down what activities inspire you. Reading blogs, listening to podcasts, reading books, lectures etc

13 – ETHICAL IMPLICATIONS OF COACHING AND MENTORING

What are ethics?

Ethics is a practice that determines what we consider to be good or bad, right or wrong, in social relations. As de Jong (2006) notes this is about the virtue of helping others, keeping the interests of the individual at the heart of the matter, honouring the trust placed in the practitioner and promoting autonomy. All of these are important in the leadership coaching relationship.

Ethics in workplace coaching is about an appreciation of what is right and wrong in certain situations, and how to act in those situations. Often ethics will be expressed in sets of rules or guidelines to help individuals act appropriately. A non-exclusive list is set out in the table below.

Why are ethics important to coaches and mentors?

Being a coach or mentor means that we place ourselves in a position of trust with our clients and we have a responsibility to act in a professional and morally responsible manner. We need to equip ourselves with the tools to resolve any potential ethical or moral conflicts that arise from the consequence of a close interaction with our clients.

Different coaching associations place a different emphasis on certain aspects of ethical behaviour, so it is important to review and understand what your own association or lead body is advocating. These codes share ethical principles that underpin professional practice, including:

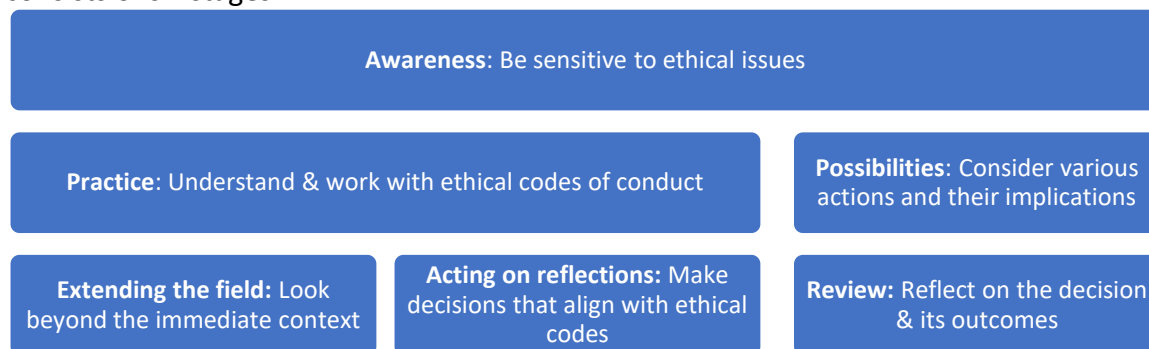
1. Do no harm to yourself or others
2. Adopt a duty of care that promotes the welfare of others
3. Practise within the scope of your competence by knowing your limits
4. Respect your client's interests
5. Respect the relevant law of the countries in which you operate

Confidentiality is a key aspect of the coaching relationship. Coaches must understand the boundaries of their role, the limitations of confidentiality, and the appropriate methods for disclosure. They must also manage digital and written coaching records in a way that respects client privacy and complies with relevant laws and regulations including the Data Protection Act/GDPR UK (2018).

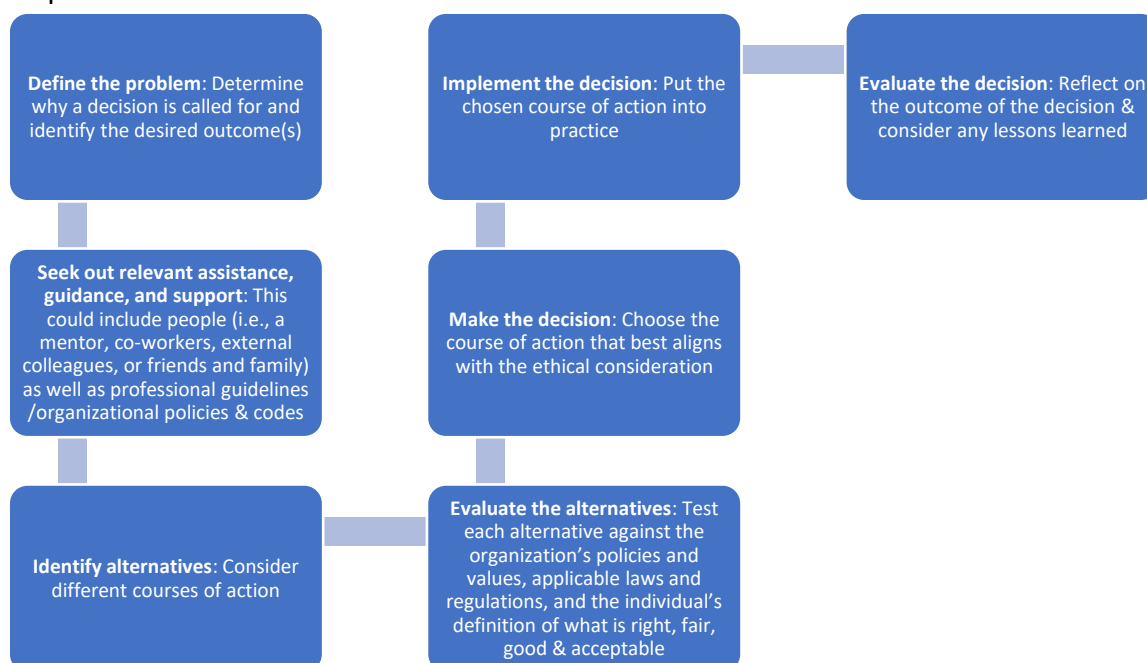
Ethical Decision Making

Models such as **APPEAR** (Passmore and Turner, 2018) and **PLUS** (Ethics Resource Centre) provide structured approaches to making decisions. These models guide coaches through the process of identifying ethical issues, considering the implications of various actions, and making decisions that align with their ethical codes.

The **APPEAR model**¹ is a practical, ethical decision-making framework developed by Jonathan Passmore and Eve Turner. It's designed to guide coaches and their supervisors through ethical dilemmas in their work and to develop ethical awareness. The model consists of six stages:



The **PLUS model**² is a structured approach to ethical decision-making. It consists of seven steps:



¹ <https://www.coaching-at-work.com/2018/02/23/reflections-on-integrity-the-appear-model/>

² <https://www.ethics.org/resources/free-toolkit/decision-making-model/>
https://www.burtbertram.com/teaching/ethics/Article_02-PLUS_DecisionMakingModel.pdf

Codes of Ethics / Conduct

The membership bodies have created professional standards for coaching and mentoring.

These include:

The Global Code of Ethics produced by the Association for Coaching and The European Mentoring and Coaching Council (EMCC), The Association for Coaching and the International Coach Federation (ICF)³ Global-Code-of-Ethics-v2-2.pdf (emccuk.org)

The International Coaching Federation ICF Code of Ethics - International Coaching Federation (coachfederation.org)

The International Regulator of Coaching and Mentoring CIC (IRCM) is the sole regulatory body for the professions in the UK.

Association for Professional Coaching and Supervision

Codes cannot cover all situations. Some additional guidance is provided to help coaches / mentors reflect on what they would do when faced with situations. See the websites of the professional bodies such as the Association for Coaching

Over to you

Reflect on the questions below and make notes.

Take a look at one or more of the Codes of Ethics / Practice detailed in the table above

Note down your understanding of ethics surrounding coaching / mentoring and the nature of confidentiality

³ They are the only membership body in the UK that covers both coaching and mentoring. It has been established to promote best practice and ensure that the highest possible standards are maintained in the coach/mentoring relationship.

How would you resolve an ethical dilemma which occurred during coaching / mentoring?

14 – GUIDELINES, PROTOCOLS AND CONTRACTS FOR INTERVENTION

It is important to establish expectations in a coaching or mentoring relationship. As a mentor or coach, you need to give some thought to what you will and won't do and what you will and won't cover with your mentee/coachee, in the sessions. This is usually agreed as part of a coaching/mentoring contract.

Contracting

Contracting is important to an effective partnership because it aligns expectations, makes explicit ground rules, builds and creating a solid foundation for the work that is to come. It provides an opportunity to:

- Set a sense of direction and purpose for the assignment
- Ensure that expectations are aligned (outcomes, process, responsibilities, behaviours)
- Provide a practical basis for relationship review and assessment of progress.

It also gives a starting point to both people about the purpose and possible outcomes of the work you will do together and, where appropriate takes account of what the organisation needs are. Foy talks about the process as an “designed alliance”, where a contract is developed with the client and their agenda at the centre and where the power resides in the relationship, not resting with the coach. Approaching contracting in this way means coaching is beginning and ending in partnership where clients can explore their work and life in a safe alliance built around the way they think, learn and work.

Professional organisations advocate a clear contract and some clear rules and boundaries for the coaching process. This will ensure that all involved can focus on achieving results.

There are a number of different elements to contracting.

If you're working with an organisation, its common to contract with them as well as the individual receiving coaching /mentoring. This is known as ‘three-way coaching’

Three-way Contracting

When line managers are supportive of the coaching/ mentoring process and take an active role in helping coachee's transfer their learning effectively to the workplace, then the changes resulting from working with a coach are more likely to stick. Where possible and practical, it is beneficial for line managers to be involved in three-way conversations with coach and coachee or mentor and mentee at the beginning and end of the coaching/ mentoring programme. This adds value to the coaching or mentoring for the employee and their team and the organisation. Other benefits can include:

- More relevant and focussed goals
- Shared understanding about the process and purpose of coaching
- Encouraging a flow of feedback between coach and line manager

Occasionally, someone may express reservations about the involvement of their line manager. Under these circumstances the coach/mentor needs to make a judgment as to whether a three-way conversation will add more than it subtracts from the quality and effectiveness.

Typically, a line manager will be involved at the beginning and end of the coaching programme.

Supervision

In coaching enhances ethical behaviour of coaches. Supervision leads to reflective awareness through different lenses about one's process in the practice of coaching, disconnected from how well one performs in competencies. A good supervisor holds the mirror to a coach as the coach does to the client. A good part of what the mirror says is about ethics.

Guidelines

There are many issues that Diversity and Inclusion. The European Mentoring and Coaching Council have guidelines for how coaches, mentors and supervisors can include Diversity and Inclusion in their practices.

15 – OVERCOMING RESISTANCE TO COACHING AND MENTORING

There are barriers to effective coaching and mentoring. The literature suggests that these stem from:

1. Issues of organisational culture where the prevailing culture is not sympathetic to mentoring and coaching, or does not fully understand it
2. Personality issues between those involved in mentoring and coaching programmes.

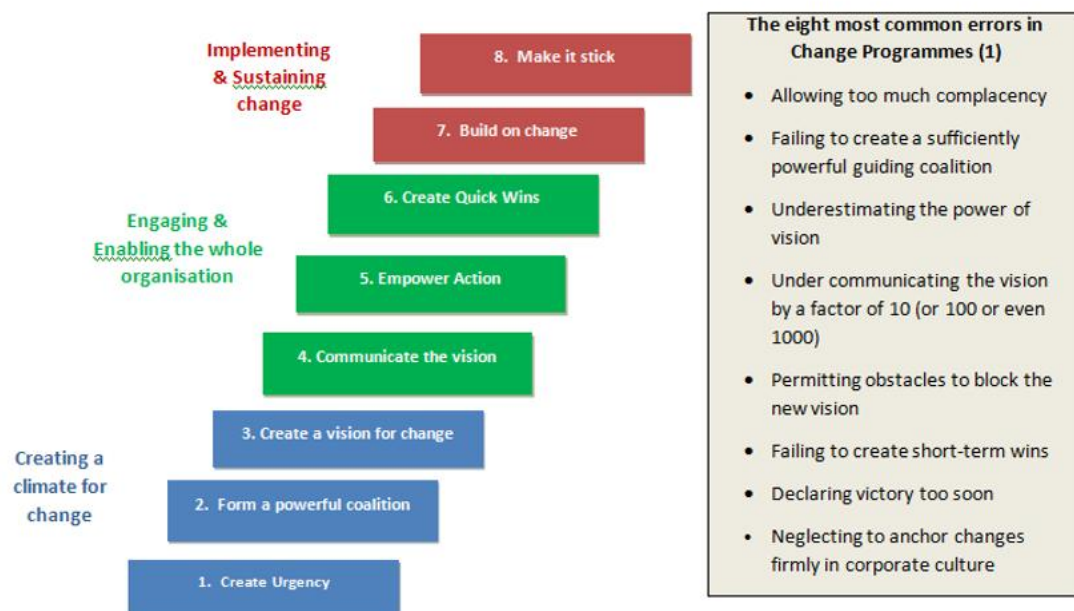
Barriers include:

- Poor matching of mentors or coaches to their clients
- Lack of managerial support
- Resentment from those not chosen to participate in mentoring and coaching programmes, perhaps due to a perception of favouritism
- The creation of unrealistic expectations as to what mentoring and coaching can achieve
- Blurring of role boundaries, for example, between the role of manager and mentor.

Understanding managing change is a key factor to overcome resistance.

One of the models is John Kotter's 'Eight Step Process to creating major change',

Models of the Change Management: Dr John Kotter's 8 Step Process to creating Major change (1)



(1) 'Leading Change' (1996) Dr John Kotter

16 – TEAM DYNAMICS AND TEAM LEARNING

Team coaching is currently the fastest growing form of coaching. This perhaps is not surprising given the sheer pace and volume of changes we experience. COVID continues to impact upon our work and home lives.

Even if we only coach or mentor on a one-to-one basis, sooner or later you will find yourself indirectly working with teams, organisations, and wider systems. This is because individual clients bring not just themselves to their coaching, but the dynamics of the teams they lead and work within, the organisational culture they are part of and the wider eco-systems they inhabit.

A key objective is to help increase an individual's awareness of self and of their way of communicating. It gives a framework for consciously thinking about and addressing change at the individual and then at the team and organisational level.

Questions a coach / mentor can have in mind:

- How do I raise this team's awareness of their own resourcefulness considering this project? (The focus on a team, as opposed to on each member individually)
- How do I invite them to take ownership and responsibility for the project as a whole? (The focus on a team, as opposed to on each member individually)
- How can this team be a net that holds this project strongly yet flexibly?

Approaching the conversation through this collective lens, the coaching can then follow the GROW model. Some sample questions are detailed below. It's not an exhaustive list and it depends on the context.

Goal

- What is our goal?
- What is important about this goal?
- If this project or task or success what would the outcome look like?
- What would be different for us our customers our stakeholders?
- If we work together in the best possible way, what would that look like?

Reality

- What strengths do we have as a team that can help us accomplish this task?
- What challenges might we encounter as a team?
- On a scale of one to 10, how ready are we to tackle this task?
- What help do we need?

Options

- How can we get more prepared for the task? (Brainstorm possible ways)

- Who can be our allies in accomplishing this task bracket? (make a list)
- What can we do? (Brainstorm actions)

Will

- What will we do as a team (create team actions)
- What will we do individually (individual actions and accountability)

Over to you

1. Let's look at one of the key tools that can be used to improve the language of teams, enabling individuals to project and talk about their behavioural strengths in a productive, safe and non-confrontational way.
2. By using it, individuals have a greater self-understanding of their strengths, which leads to more effective communication between colleagues and managers. Belbin's Team Styles can be a powerful tool to help open up coaching conversations, and to explore strengths and perceptions of others.

Turn to ANNEX 1 - TEAM QUESTIONNAIRE. Complete it and then answer the questions below.

Note down your reflections on how you would coach / mentor teams within your organisation

What are your preferences and what implications might they have to how you apply coaching and mentoring?

How might using this type of tool assist you in your practice as a coach / mentor?

How might you approach coaching / mentoring a team with individuals that have different types of preferences?

17 – CREATING AN ORGANISATIONAL CULTURE OF COACHING AND MENTORING

Coaching was once reserved for the C-Suite level of organisations, deployed particularly when they were facing change, were over-stretched or underperforming.

This has shifted and leaders have increasingly started to focus on how they can coach their teams and use coaching across the organisation. This shift sees managers viewing their role as similar to that of a coach: supporting development, providing actionable feedback, and helping their people to expand their own value to their organisations.

What is a Coaching Culture?

It can be hard to define the components of a coaching culture. A recent literature review (Kapoutzis et al 2024) shows four aspects as foundational elements and necessary conditions for the development of coaching cultures:

1. Leadership buy-in
2. Coaching style management
3. Formalized process
4. Leadership promoting development frameworks and organisational change.

A note of caution is given by Clutterbuck and Megginson (2005) who warn against coaching being perceived as a panacea for all an organisation's problems:

"A coaching culture is an attractive proposition for a variety of reasons. However, there may be a tendency for organisations who have invested in a journey towards it to overstate its benefits and to overlook the obstacles that exist."

Over to you

Watch the video from the Hampshire Corporate Development Learning Technology Team 'Why Build a Coaching Culture' (8.57) <https://youtu.be/kaUVkMR8Fx0>

How would you describe your culture in your organisation?

How could you model a coaching culture in your own organisation?

Reflect on the potential benefits of a coaching culture. Note down what you think they could be in your organisation. Think about how and what could change

What barriers could you face and what could you do to overcome them?

18 – MONITORING AND EVALUATING IMPACT OF COACHING AND MENTORING

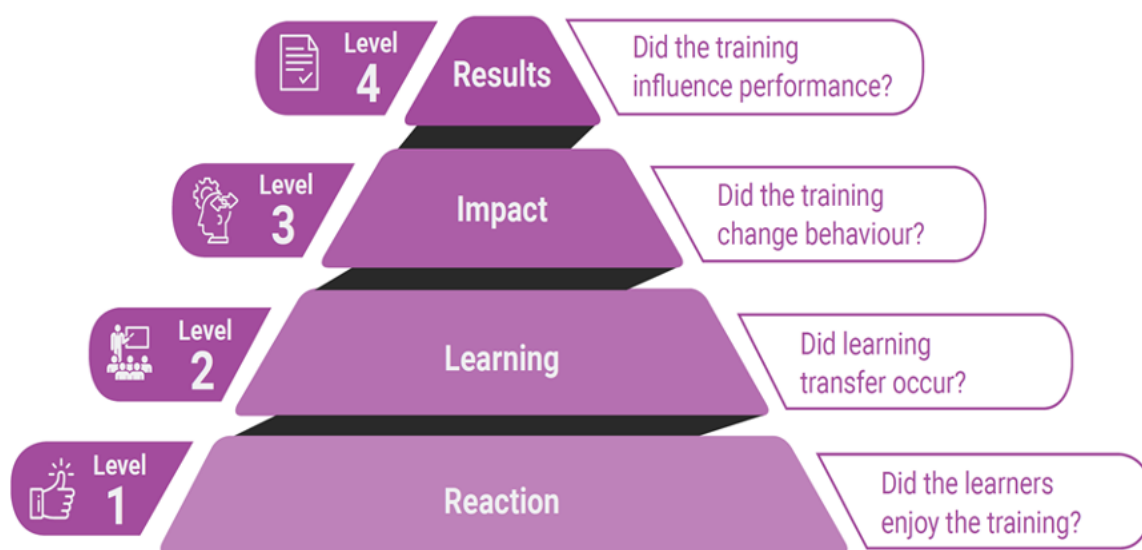
Coaching and mentoring can have a significant impact on individuals and organisations. Entering into a coaching relationship has been demonstrated to improve work performance, build effective communication skills and improve confidence.

However, measuring the actual impact of coaching can be more difficult. To better understand the true impact of coaching for an organisation or their staff, it is important to understand what is meant by ‘impact’.

We are looking to measure change. Change in the individual, change in results, change in performance, change in thinking or change in behaviour.

Evaluating impact of interventions

The Kirkpatrick Model can be helpful to evaluate the impact of training and development activities. First developed in 1959, it has been updated twice. It focuses on impacts on reaction, learning, behaviour, and results. This helps to ensure that we move beyond assessing satisfaction rates with training and development activities and focus on what sustainable impact the training has had on the organisation.



Putting this model into a coaching and mentoring context.

Level of impact	Explanation
1 Reaction	Allows you to make improvements for future sessions by asking questions such as: • Did you feel the session was worth your time? • What were the strengths and weaknesses of the session? • What are the most important things you learnt?
2 Learning	Before the coaching / mentoring begins, test your clients to determine their knowledge, skills levels and attitudes. Then when the intervention is finished, test a second time to measure what they have learned or measure learning with interviews or verbal assessments
3 Impact	Managers should be closely involved at this stage. To measure the behaviour of an individual, you can conduct observations and interviews with the manager or peers of the client
4 Results	At this stage, results will be analysed, and outcomes highlighted that have been good for the team or organisation

Over to you

Read the case study at ANNEX 2 - EVALUATING THE IMPACT OF COACHING

Note down any thoughts on what was effective or less effective with the approach taken?

What sources of information might you be able to use to evaluate the impact of coaching / mentoring in your organisation?

Who could help you identify or access these sources of information?

19 – ACTION PLANS AND INDIVIDUAL PRESENTATIONS

Thinking about this training, let's take steps to implement it.

1. List up to five things that you will do differently

(i)

(ii)

(iii)

(iv)

(v)

What will help you to achieve these?

What could hinder you achieving these?

--

Now, create a personal development plan with measurable objectives. A personal development plan refers to short, medium and long-term time bound objectives, development needs, resources, support, development opportunities, review, and evaluation methods.

Action Plan

Key strengths	
Please summarise your key strengths	
Key priorities	
Please summarise your key development needs	
Development Need:	
Reason for choosing	
Goal Describe the desired new behaviour in SMART terms	
Benefits Describe the benefits of reaching this goal	

Risks Outline any risks that might be involved in reaching this goal	
Obstacles Outline any potential obstacles	
How are you going to overcome them?	
Resources/ support needed	
Where available?	

Personal Development Plan

SPECIFIC – give details about your objective	MEASURABLE – how will you measure success?	ACHIEVABLE – what actions are needed to achieve this? What resources do you require?	RELEVANT – why is this objective relevant?	TIME – when will you achieve and/or review this?
1				
2				
3				

SPECIFIC – give details about your objective	MEASURABLE – how will you measure success?	ACHIEVABLE – what actions are needed to achieve this? What resources do you require?	RELEVANT – why is this objective relevant?	TIME – when will you achieve and/or review this?
4				
5				

SWOT ANALYSIS

Reflect on our time together. What have you learnt about or learnt to do? What have been your insights?

Summarise How You Feel. What are Your Insights from this Course

Strengths <i>What am I good at?</i>	Weakness <i>What do I struggle with?</i>
Opportunities <i>What opportunities might there be if I play to my strengths whilst developing in my weaker areas?</i>	Threats <i>What might be the consequences if I don't play to my strengths and allow my weaker areas to prevail?</i>

ANNEX 1 – TEAM QUESTIONNAIRE

Read the seven statements below. Allocate 10 points per section. You do not need to allocate every statement points, however each section must add up to 10. i.e., answer (a) could have 10 points and the rest may have none. Do this for all seven sections. Then transfer allocated points per statement to the Points Table. Repeat this for the Analysis Sheet.

1. What I believe I can contribute to a team:

- a. I think I can quickly see and take advantage of new opportunities.
- b. I can work well with a very wide range of people.
- c. Producing ideas is one of my natural assets.
- d. My ability rests in being able to draw people out whenever I detect they have something of value to contribute to group objectives.
- e. My capability to follow through has much to do with my personal effectiveness.
- f. I am ready to face temporary unpopularity if it leads to worthwhile results in the end.
- g. I can usually sense what is realistic and likely to work.
- h. I can offer a reasoned case for alternative courses of action without introducing bias or prejudice.

2. If I have a possible shortcoming in teamwork, it could be that:

- a. I am not at ease unless meetings are well-structured, controlled and generally well conducted.
- b. I am inclined to be too generous towards others who have a valid viewpoint that has not been given a proper airing.
- c. I have a tendency to talk too much once the group gets on to new ideas.
- d. My objective outlook makes it difficult for me to join in readily and enthusiastically with colleagues.
- e. I am sometimes seen as forceful and authoritarian if there is a need to get something done.
- f. I find it difficult to lead from the front, perhaps because I am over-responsive to group atmosphere.
- g. I am apt to get too caught up in ideas that occur to me and so lose track of what is happening.
- h. My colleagues tend to see me as worrying unnecessarily over detail and the possibility that things may go wrong.

3. When involved in a project with other people:

- a. I have an aptitude for influencing people without pressurising them.
- b. My general vigilance prevents careless mistakes and omissions being made.

- c. I am ready to press for action to make sure that a meeting does not waste time or lose sight of the main objective.
- d. I can be counted on to contribute something original.
- e. I am always ready to back a good suggestion in the common interest.
- f. I am keen to look for the latest in new ideas and developments.
- g. I believe my capacity for judgement can help to bring about the right decisions.
- h. I can be relied upon to see that all essential work is organised.

4. My characteristic approach to group work is that:

- a. I have a quiet interest in getting to know colleagues better.
- b. I am not reluctant to challenge the views of others or to hold a minority view myself.
- c. I can usually find a line of argument to refute unsound propositions.
- d. I think I have a talent for making things work once a plan has to be put into operation.
- e. I have a tendency to avoid the obvious and to come out with the unexpected.
- f. I bring a touch of perfectionism to any job I undertake.
- g. I am ready to make use of contacts outside the group itself.
- h. While I am interested in all views, I have no hesitation in making up my mind once a decision has to be made.

5. I gain satisfaction in a job because:

- a. I enjoy analysing situations and weighing up all the possible choices.
- b. I am interested in finding practical solutions to problems.
- c. I like to feel I am fostering good working relationships.
- d. I can have a strong influence on decisions.
- e. I can meet people who may have something new to offer.
- f. I can get people to agree on a necessary course of action.
- g. I feel in my element where I can give a task my full attention.
- h. I like to find a field that stretches my imagination.

6. If I am suddenly given a difficult task with limited time and unfamiliar people:

- a. I would feel like retiring to a corner to devise a way out of the difficulty before developing a solution.
- b. I would be ready to work with the person who showed the most positive approach.
- c. I would find some way of reducing the size of the task by establishing what different individuals might best contribute.
- d. My natural sense of urgency would help to ensure that we did not fall behind schedule.
- e. I believe I would keep cool and maintain my capacity to think straight.
- f. I would retain a steadiness of purpose in spite of the pressures.
- g. I would be prepared to take a positive lead if I felt the group were making no progress.

- h. I would open up discussions with a view to stimulating new thoughts and getting something moving.

7. With reference to the problems to which I am subject in working in groups:

- a. I am apt to show my impatience with those who are obstructing progress.
- b. Others may criticise me for being too analytical and insufficiently intuitive.
- c. My desire to ensure that work is properly done can hold up proceedings.
- d. I tend to get bored rather easily and rely on one or two stimulating people to spark me off.
- e. I find it difficult to get started unless the goals are clear.
- f. I am sometimes poor at explaining and clarifying complex points that occur to me.
- g. I am conscious of demanding from others the things I cannot do myself.
- h. I hesitate to get points across when I run up against real opposition.

Scoring

Add your scores to your table below.

Points table

SECTION SCORES								
	A	B	C	D	E	F	G	H
1								
2								
3								
4								
5								
6								
7								

Analysis sheet

SECTION		IM		CO		SH		PL		RI		ME		TW		CF
1	g		d		f		c		a		h		b		e	
2	a		b		e		g		c		d		f		h	
3	h		a		c		d		f		g		e		b	
4	d		h		b		e		g		c		a		f	
5	b		f		d		h		e		a		c		g	
6	f		c		g		a		h		e		b		d	
7	e		g		a		f		d		b		h		c	
TOTAL																

Interpretation of the results: Team Styles

The analysis sheet on the page contains a list of eight pairs of letters; these relate to the styles. The questionnaire draws from the work of Meredith Belbin, whose research showed that the most successful teams comprised **a diverse mix of behaviours**. He advocated that to build high-performing teams, we need to represent each Team's Role behaviours at the appropriate times.

IM Implementer

CO Coordinator

SH Shaper

PL Plant

RI Resource Investigator

ME Monitor Evaluator

TW Team Worker

CF Completer Finisher

Read below for a description of each of the styles. This can be used to gain insight into your preferences and your teams. It can be used as a team-building activity.

1. Implementer

Objective:

To turn general concepts and plans into a practical working brief; to carry out that brief systematically.

Methods to be cultivated:

- Helping ensure the team's tasks have been structured and the objectives clearly outlined.
- Sorting out the practical details from the broad brief and attending to them.
- Maintaining a steady, systematic approach, whatever the pressures or lack of pressures exist.
- Persevering in the face of difficulty and striving to meet targets.
- Providing practical support and back-up to other team members.

Behaviour to be aware of:

- Unconstructive criticism of team members' ideas and suggestions.
- Lack of flexibility: An implementer's contribution is greatest when balancing perseverance and adaptability.
- Competing for status within the team through their strong sense of personal identity.

Additional points:

As managers, Implementers' strengths lie in their concern for clarifying objectives in practical terms and introducing and maintaining structure in a team. As a team member, their conscientiousness and perseverance will help ensure that projects are completed to standard and to schedule. Their sense of duty prevents their concern for personal status from interfering with their work towards helping all team members achieve their objectives.

2. Co-ordinator

Objective:

To control and organise their team's activities, making best use of the resources available.

Methods to be cultivated:

- Preparing the ground so that each meeting is structured and organised to enable all its business to be transacted efficiently within the time allotted.
- Encouraging each individual to play their part in pursuit of the team's objectives by identifying both the objectives of the exercise and the way in which each team member can best help.
- Being on the lookout for weaknesses in the team's make-up and working to correct them either by making changes in team membership or by calling for, and expanding, certain team roles amongst existing team members.
- Co-ordinating the use of the resources available both within and outside the team; and keeping people's efforts orientated in the direction of achieving the team's goals.
- Exercising personal self-discipline and perseverance in acting as a focal point for group effort, especially when things get difficult.
- Proper and appropriate delegation. Choosing the moment at which to move from consultation and discussion to decision-making.

Behaviour to be aware of:

- Taking advantage of a formal role to hog the stage.
- Rigidity and obstinacy posing as grit and determination.
- Failure to recognise individual abilities and merits in the team so that poor use is made of team resources.
- Competing with significant team resources, notably the Plant or Monitor Evaluator and refusing to admit superior ability in other team members.
- Abdicating leadership role in the face of opposition or apathy. Additional points:

As managers, Coordinators are in a position to employ their talents overtly. In a more junior role, they should support harmony, coordination and structure in the team without making their contributions in any way a threat to the group's more senior members. The coordinator should always remember that while they have many of the qualities that underlie other team roles, they must be prepared to play the role or roles that ensure the most effective team performance. They may have to shift between disguising their talents and taking a leading role according to their resources and the situation, and despite their strong ego, they must know which part to play and when.

3. Shaper

Objective:

To give shape and form to the team's activities.

Methods to be cultivated:

- Directing the team's attention to the need to set objectives and establish priorities and helping establish these.
- Taking a broad perspective of the team's purpose and helping members perceive their role and contribution within the scheme.
- Exerting a directive influence on group discussions and summing up the outcomes in terms of the objectives and targets set.
- Generally, the team's activities should be given an appropriate shape or pattern by coordinating the various contributions.
- Keep a constant objective and detached view of the team's progress and achievements and intervene when they veer from a relevant and appropriate path.
- Intervening when the group is in danger of moving too far from its brief, or another member is "getting away" with an inappropriate idea or suggestion.

Behaviour to be aware of:

- Steam-rolling team members when in a position of authority.
- Assuming more authority and status than the group would warrant.
- Competing with other team members, particularly the Plant and the Monitor Evaluator.

Additional points:

The Shaper can develop a sense of direction in a leaderless group, but they should do so subtly rather than intensively. If they find themselves in a more formal leadership position, they will need to consider the Coordinator role, and adopt a more positive controlling co-ordinating position. With its greater emphasis on routine activities and duties, such a role will entail additional self-discipline. Where the Shaper has only junior status in a group, they must time their contributions and interventions diplomatically, possibly putting them as leading questions.

4. PlantObjective:

To act as a prime source of ideas and innovation for their team.

Methods to be cultivated:

- Concentrating their attention on basic strategies and significant issues.
- Formulating new ideas relevant to the team's objectives.
- Looking for possible breaks in approach to a problem with which the group has been confronted for some time.
- Timing their contributions and presenting their proposals at appropriate moments to assist their positive reception.

Behaviour to be aware of:

- Attempting to exhibit their capabilities over too wide a field.

- Devoting their efforts and creative capability to their interests rather than their team's needs.
- Taking umbrage when their ideas are monitored, evaluated, and possibly rejected, retiring like Achilles to their tent to make no further contribution to their team's efforts.
- Getting too inhibited about putting their ideas forward, especially in a dominant, extrovert or over-critical group.

Additional points:

The Plant, as a manager, must exercise considerable self-discipline and be prepared to listen to their team's comments on their proposals (particularly their Monitor Evaluator colleague(s)). On the other hand, they must not let the stresses of controlling the team stifle their creative input. It will take all their ingenuity to combine the roles successfully.

The Plant can hope to be used as a resource in a less senior role. But if this does not turn out, they should devote some of their energies and talents towards establishing themselves as the person the team turns to for ideas, solutions, and fresh viewpoints.

5. Resource investigator

Objective:

Explore outside resources and develop contacts that may be useful to their team.

Methods to be cultivated:

- Making good use of their ability to get on with people quickly and efficiently to extend the range of the team's contacts and valuable friendships.
- Using their interest in new ideas and methods to explore possibilities Outside the immediate working environment, introduce them to their team.
- To expand their role as the team's point of contact with outside bodies, keeping up to date with all developments that may be relevant to the team's work.
- They assist in maintaining good relationships and harmony within their team and encourage fellow team members to make the best use of their talents, especially in times of pressure and crisis.

Behaviour to be aware of:

- Getting too involved with their ideas at the expense of exploring others'.
- Rejecting ideas or information before submitting them to the team for their opinion.
- Relaxing too much when the pressure of work eases.
- Allowing their liking for talking and sociability to lead them to unproductive use of time.

Additional Points:

When working well, the resource investigator can broaden the scope and vision of the team. At worst, the team may feel abandoned by them as the resource investigator investigates elsewhere.

6. Monitor-evaluator

Objective:

To analyse ideas and suggestions from within and outside the team and to evaluate their feasibility and practical value in terms of the team's objectives.

Methods to be cultivated:

- Using their critical thinking ability constructively in the team's interests.
 - Achieving a judicious blend of experimenting outlook and critical appraisal.
 - Building on their colleagues' suggestions, helping to develop their ideas to relevant and practical fruition.
 - Making a firm but diplomatic case against their team, adopting unsound approaches to their problems and choosing the appropriate moment for doing that.
 - Developing a close working relationship with the team's Plant, if there is one.
- Behaviour to be avoided:
- They use their critical thinking ability to advance at the expense of their team's objectives.
 - Tactless and destructive debunking of colleagues' suggestions.
 - Negative thinking allows their critical powers to outweigh their open-minded receptivity to new ideas.
 - Competitive behaviour, particularly with the Co-ordinator or Plant.
 - Lowering their team's morale by being rather too critical, objective and damning at an inappropriate moment.

Additional points:

A successful Monitor Evaluator combines high critical thinking with personal qualities of fair-mindedness, practicality, and receptivity to change. The role is often combined with another team role. When the M/E is also the team leader, they must take extra care that they do not over-dominate the other members of the team and stifle their contributions. Feeding other people your lines is particularly relevant in their case.

At a less senior level, the Monitor Evaluator has the problem of making their point heard and not appearing to threaten their colleagues. If they can avoid becoming unduly sceptical and cynical in the process, their experience at this stage will stand them in good stead as they rise in the hierarchy.

7. Team worker

Objective:

To help individual members to achieve and maintain team effectiveness.

Methods to be cultivated:

- Observing the strengths and weaknesses of members.
- Supporting members in their strengths, e.g., building on suggestions.
- Underpinning team members' shortcomings by personal assistance or finding appropriate resources.

- Improving communication between members.
- Fostering a sense of team spirit by setting an example in team member behaviour.

Behaviour to be aware of:

- Competition for status or dominance in the group.
- Siding with one member against another.
- The behaviour might give the group a negative image to the members themselves and outsiders.
- Any conspicuous or ostentatious behaviour in the exercise of the team worker function.

Additional points:

The Team Worker role can be exercised at different status levels within the group. As a manager, the team worker should interpret their role as a developer of others and delegator. At a junior level, they may act as a behind-the-scenes helper. Their status, however, should remain the primary objective in serving the team.

8. Completer/finisher

Objective:

Ensure all the team's efforts are as near perfect as possible and nothing is overlooked.

Methods to be cultivated:

- Generally, keeping an eye open for mistakes of omission or commission, especially those that may fall between the responsibilities of two people.
- Choosing an area of work in which finishing qualities are essential.
- Looking for details that could be improved that may spoil the finished product.
- Actively searching for aspects of the work that need more than usual attention.
- Constantly endeavouring to raise the standard of all the team's activities by vigilance and help as required.
- Maintaining a sense of urgency within the team.

Behaviour to be aware of:

- Unnecessary emphasis on detail at the expense of the overall plan and direction.
- Negative thinking or destructive criticism. Lowering team morale by excessive worrying.

Additional points:

The Completer Finisher in a team has to work hard at being chosen to review work and check for errors rather than being seen as a nit-picker.

If they are leaders, they should look for another Completer Finisher in the team or coach someone else, as they will need more time to be more detail-conscious.

Back to Over to you in part 16.

ANNEX 2 – EVALUATING THE IMPACT OF COACHING

This case study is from the ‘Practical Methods for Evaluating Coaching’, Alison Carter.

[Practical Methods for Evaluating Coaching \(employment-studies.co.uk\)](http://employment-studies.co.uk)

NHS in Wales — learning about coaching as a tool for cultural change

Context of the coaching programme

Following the introduction of the Welsh National Assembly and other changes to the political landscape, the Centre for NHS Leadership in Wales identified that the time was right to broker a development programme for CEOs and directors across the public healthcare sector. The programme aimed to kick-start the creation of a more innovative organisational culture that valued new ideas, new thinking and managed risk-taking. Twelve coaches with a good knowledge of the sector, selected from five different external coaching companies, provided four one-to-one coaching sessions. Thirty-two CEOs and directors participated as ‘coachee’s’.

Purpose of the evaluation

The Tavistock Institute was asked to conduct evaluation on behalf of all the programme sponsors and partners. The evaluation approach focused on two questions:

1. Has the coaching intervention taken place in the intended way?
2. What can the organisations learn from the intervention?

Evaluation methods

A variety of evaluation methods were used, many of which were based on ‘self-report’ by coachee’s. Firstly, all coachee’s were asked to provide some ‘baseline data’ at the start. This included information about:

- the biggest challenges they faced in their role
- the biggest workplace issues
- which networks they were already involved in.

After each coaching session every coachee was asked to complete a score sheet to generate data useful for quality assurance purposes. Aspects scored included timing, quality of coach/coachee relationship and content. Coachee’s were also asked to identify the most helpful element in each session. After their final session, all coachee’s were asked to complete a questionnaire on more general issues such as:

- motivation to joining programme
- criteria used in selecting which coach to work with

- particularly helpful models / inputs
- what they have done differently as a result.

Six of the 32 coachee's were also interviewed face to face, to allow some of the issues to be explored in more detail.

The perceptions of coaches were also collected. They were asked at the outset what issues they imagined might be key. The idea was to go back to the coaches again after the final session to compare these with the actual issues arising. Finally, coach/coachee pairs were asked to write a 'learning vignette' covering what they were working on and how successful the coaching relationship had proved.

Findings

The findings revealed that the opportunity offered by the coaching had definitely been perceived and utilised as a management learning tool, rather than a personal development one. Coaching, as a learning method, was also viewed positively. Coachee's valued the individual care and attention, and the acquisition of easy to apply models. The programme was also thought particularly timely in terms of inter- professional learning and had a positive effect on the personal morale and motivation of coachee's. The evaluation also raised some questions. The implications of using 'known' coaches — who were formerly senior employees within the sector — might have sent mixed messages to coachee's if the programme was about retention. Coachee comments from the interviews suggests that using 'role-models' who have left an organisation can be seen as something of a paradox.

Tips from NHS in Wales illustration

1. Response rates from feedback sheets or reaction questionnaires can be improved by asking coaches or line managers to distribute and collect them.
2. It is difficult to evaluate the potential of coaching for cultural or other systemic change. Face to face interviews enable behaviour change to be explored in more depth.
3. The production of learning 'vignettes' after the final coaching session can serve as a useful reminder to coachee's of the need to apply learning in the workplace.

Return to Over to you in part 17

ANNEX 3 – POWERFUL QUESTIONS

Powerful questions are provocative queries that put a halt to evasion and confusion. By asking the powerful question, the coach invites the client to clarity, action, and discovery at a whole new level. As you can see from the following examples, these generally are open-ended questions that create greater possibility for expanded learning and fresh perspective.

Evaluation What is the opportunity here? What is the challenge? How does this fit with your plans/way of life/values? What do you think that means? What is your assessment?	Example What is an example? For instance? Like what? Such as? What would it look like?
Exploration What is here that you want to explore? What part of the situation have you not yet explored? What other angles can you think of? What is just one more possibility? What are your other options?	For Instance If you could do it over again, what would you do differently? If it had been you, what would you have done? How else could a person handle this? If you could do anything you wanted, what would you do?
Fun as Perspective What does fun mean to you? What was humorous about the situation? How can you make this more fun? How do you want it to be?	History What caused it? What led up to it? What have you tried so far? What do you make of it all?

Implementation What is the action plan? What will you have to do to get the job done? What support do you need to accomplish it? What will you do? When will you do it?	Integration What will you take away from this? How do you explain this to yourself? What was the lesson? How can you make sure you remember what you have learned? How would you pull all this together?
Learning If your life depended on acting, what would you do? If you had free choice in the matter, what would you do? If the same thing came up again, what would you do? If we could wipe the slate clean, what would you do? If you had it to do over again, what would you do?	Options What are the possibilities? If you had your choice, what would you do? What are possible solutions? What will happen if you do, and what will happen if you don't? What options can you create?
Outcomes What do you want? What is your desired outcome? If you got it, what would you have? How will you know you have reached it? What would it look like?	Perspective When you are ninety-five years old, what will you want to say about your life? What will you think about this five years from now? How does this relate to your life purpose? In the bigger scheme of things, how important is this? So what?
Planning What do you plan to do about it? What is your game plan? What kind of plan do you need to create? How do you suppose you could improve the situation? Now what?	Predictions How do you suppose it will all work out? What will that get you? Where will this lead? What are the chances of success? What is your prediction?

Resources What resources do you need to help you decide? What do you know about it now? How do you suppose you can find out more about it? What kind of picture do you have right now? What resources are available to you?	Starting the Session What's occurred since we last spoke? What would you like to talk about? What's new/the latest/the update? How was your week? Where are you right now?
Substance What seems to be the trouble? What seems to be the main obstacle? What is stopping you? What concerns you the most about . . .? What do you want?	Summary What is your conclusion? How is this working? How would you describe this? What do you think this all amounts to? How would you summarize the effort so far?
Taking Action What action will you take? And after that? What will you do? When? Is this a time for action? What action? Where do you go from here? When will you do that? What are your next steps? By what date or time will you complete these steps	

Co-Active Coaching

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FURTHER NOTES

Additional Notes

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Podcasts

Association for Coaching. A library of resources from hosts in conversation with thought leaders, coaches, and experts as they uncover the deep insights, knowledge, tools and strategies you need to take your coaching practice to the next level. [Podcast Channel Home \(associationforcoaching.com\)](https://www.associationforcoaching.com)

Coaching for Real Leaders. With Dave Stachowiak hosts diverse guests on addressing challenges in the workplace. <https://podcasts.apple.com/gb/podcast/coaching-for-leaders/id458827716>

Coaching Real Leaders. With Executive Coach Muriel Wilkins, where she coaches clients for one hour on a specific area of concern. This is a terrific resource for executive leadership coaches, allowing them to hear how she gets clients to increase awareness and shift perspective <https://hbr.org/2020/12/podcast-coaching-real-leaders>

The Coaching Crowd® Podcast. A weekly podcast for leaders and HR professionals who are passionate about helping others to find alignment in their lives through coaching, and who are thinking of training and developing as a coach. Hosted by coaching company founders Zoe Hawkins and Jo Wheatley
<https://podcasts.apple.com/gb/podcast/the-coaching-crowd-podcast-with-jo-wheatley-zoe-hawkins/id1594603806>