



# **Self Discovery Series**

## Coaching Effectiveness Instrument

**JON WARNER & JULIAN LIPPI**

2ND EDITION

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by Jon Warner & Julian Lippi

## ABOUT THE AUTHORS

*Jon Warner* is a professional manager with over 20 years experience working for major multinational companies in the United Kingdom, Europe, the United States of America and Australia. After launching Team Publications in 1994, Jon became well known in the area of organisational consultancy and the pursuit of best practice leadership. Now based in Los Angeles, he is currently involved in the development and launch of corporate universities providing internationally recognised qualifications. Jon has authored literally hundreds of training and HR related tools and resources (under the imprint of Team Publications) and is an expert in the development of profiles and assessments.

*Dr Julian Lippi* spent 10 years in broadcasting in both ABC Radio and Television Current Affairs and News, including five years producing the prime time “hard” current affairs program Nationwide. Establishing his own consulting business in 1991, Julian has since worked with thousands of organisations, large and small, in both private and public sectors in Australia and Asia. Julian has been awarded a PhD for research he undertook on the mentoring and coaching of managers and team leaders. He also holds a Bachelor of Arts Degree, Graduate Diploma in Management and a Master of Business Management.



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- Communication/Interpersonal Skills
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# Introduction

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Coaching is not a specialist occupation reserved for the few, but a vital way of operating for those who are trying to get the best out of their people. It is a key skill which will help you to develop others.

While the idea of coaching is relatively new in commercial or business organisations, it's been around for a long time. Both sporting teams and top sports people like golfers and tennis players have coaches to help them improve as they strive to be the best. Coaches are even used in the arts, to help build skills in areas such as singing, dance or drama.

No matter what field coaches operate in, their role is to provide feedback about performance and help others plan their development, in order to improve and be the best they can be. To be a good coach, you don't have to be an expert in a particular profession or field, but you do need the desire and skills to help another person achieve more. In sport, many of the top coaches were only ever average performers and top sports people often don't make it as coaches.

In businesses or in any other organisation, in the same way as in sport, coaching is fundamentally concerned with helping people to learn to develop themselves. The process usually involves identifying areas for improvement, and then helping the person to develop skills or competencies on the job, undertake informal or formal training sessions or even take on higher education.

Research has shown that there are seven categories that contribute to good (or ineffective) coaching. These are the main factors that will impact on your efforts as a coach:

- **Empathising ability**
- **Listening skills**
- **Capacity to confront and challenge**
- **Problem-solving ability**
- **Feedback-giving skills**
- **Capacity to empower**
- **Mentoring skills**

This competency-based questionnaire has been designed to help you understand more about your relative skills or abilities in each of these critical areas, and give you a picture of your overall ability to coach others. This will help you determine where to target your development activities in order to improve your skills.

Although primarily intended as a self-assessment, the questions have been worded so this tool can also be used for 180 or 360-degree feedback (by purchasing extra copies of this booklet – one for each respondent). An online version is also available which provides automated scoring and a comprehensive output report. Please contact us for more information.

# Instructions

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On the following pages there are seven mini-questionnaires (one to each page). Follow Steps 1 to 4 of these instructions for each of these questionnaires. When all the mini-questionnaires have been completed, continue on to Step 5 to calculate your overall Coaching Effectiveness score.

**STEP 1** Read the introduction at the top of the mini-questionnaire to help you understand the category.

**STEP 2** Respond to each statement by selecting a score of 1, 2, 3, 4 or 5. A score of 1 means 'almost never', and a score of 5 means 'almost always'.

**Please note – there are no right or wrong answers. It is important to select the score that reflects how you currently think and/or behave, not how you would like to in the future. This will help you build an accurate picture of your current ability to coach others effectively, and discover what actions you can take to improve your skills.**

To help you quickly see an overview of your scores, we recommend that you shade in the boxes that represent the number you have chosen. For example, if your answer to a question is 1, you would shade in the first box only for that question. If your score was 3, you would shade in the first three boxes. Alternatively, you could draw a thick line through the boxes to represent your score.

**Example:** Score = 3

1	2	3	4	5

**STEP 3** Add up your responses to every statement in the mini-questionnaire and then divide the total by 12.

Shade in the boxes to represent this number in the Aggregate Score box. It is highly likely that your score will not be a whole number (for example, it could be 3.7 or something similar), so just estimate the point you need to shade to.

**STEP 4** Once you have completed all seven mini-questionnaires, plot the Aggregate Score from each onto the spider diagram on page 12. For example, if your score in Mentoring Skills is 2.7, make a mark between 2 and 3 (closer to the 3), on the axis with that name. When you have plotted all seven scores, draw lines to join them together into a roughly circular shape.

**STEP 5** Add all the seven category scores together and then divide them by 7 to calculate your overall Coaching Effectiveness score. Enter this number in the box at the bottom of page 12.

**STEP 6** Read the interpretative notes underneath each mini-questionnaire and the Improvement Strategies on page 13, and then use this information to help you complete the Personal Action Plan on page 14. Keep in mind that you will see the greatest improvement if you begin by focusing on those areas where your scores are lowest and determining some simple steps you can take to develop your skills.

**STEP 7** You might like to give a copy of your completed Personal Action Plan to a friend, or colleague, asking them to check in three months if you are on track with your plan.





# Capacity to Confront & Challenge

**Capacity to Confront and Challenge looks at the extent to which you help people to “face up” to their personal issues and problems as a means of starting their journey to dealing with them successfully. This category asks the question, “How successfully do you work with people to create an honest appraisal of their potential shortfalls and encourage new thinking and strategies to overcome them?”**

Please complete this questionnaire segment as honestly as possible as it may help you to improve your ability to coach more effectively (if you feel this represents an accurate picture). The choice scales are as follows:

**1 = almost never, 2 = occasionally, 3 = frequently, 4 = very frequently, 5 = almost always.**

Fill in all the boxes up to the score you select to create a shaded bar.

**This person:**

1. Encourages people to think ‘laterally’
2. Helps people acknowledge that they may lack some knowledge or information
3. Guides others towards a deeper knowledge about their own feelings and emotions
4. Finds opportunities for people to apply any new knowledge or skills
5. Challenges people to take on difficult or stretching tasks
6. Helps people to identify the ‘root’ causes of problems or issues they face
7. Points out performance shortfalls directly and without undue hesitation
8. Encourages people to solicit feedback on themselves from their peers
9. Works with others to set targets that are not easy to reach without hard work & effort
10. Helps people to break down their problems into manageable parts
11. Encourages people to regard every personal criticism as an opportunity to improve
12. Invites individuals to become intolerant of mediocrity in themselves or others

Almost Never                      Almost Always

1	2	3	4	5

(Add up all the column scores and divide by 12) **AGGREGATE SCORE**

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**INTERPRETATION**

Scales predominantly in the fours and fives (‘very frequently’ and ‘almost always’) are likely to mean that this person is effective at playing ‘devil’s advocate’ in a balanced and constructive way. He or she may cause individuals to become less willing to accept that their difficulties and concerns should be tolerated or seen as insoluble, and thus create a healthy intolerance of average or mediocre performance or outcomes.

Scales predominantly in the ones and twos (‘almost never’ and ‘occasionally’) are likely to mean this person rarely challenges others to think about issues they face in new or different ways, or to reflect more deeply about performance shortfalls. He or she is also likely to be prone to tolerate mediocrity and allow others not to confront their ‘average’ performance or outcomes, when they occur.

**IMPACT**

A high score person will be likely to use a variety of different ways and means to help people to focus on their performance more critically, as a basic platform upon which

they can set their own targets to improve. This person is likely to be seen as firm but fair in dealing with people and solution-focused in looking at future possible courses of action when coaching others.

A low score person will be likely to find performance coaching more difficult because of a lack of willingness to get people to reflect on their poor or average performances really critically and to strive to reach higher goals. This person may therefore hesitate in offering full and candid feedback, or even fear the negative impact that criticism may have on individuals, when it is offered.

**ACTION FOR LOW SCORERS**

Low scorers need to become personally comfortable in giving people more direct and candid feedback about performance in ways that help individuals to want to stretch themselves to overcome poor or average performance. To do this, they should practise asking probing questions and challenge individuals to think deeply and creatively to look for new or different approaches they can take, as an alternative to accepting their current situation.



# Feedback-Giving Skills

**Feedback-Giving Skills looks at the extent to which you offer useful and constructive feedback on performance that is happily accepted and acted upon. This category asks the question, “How well do you utilise a range of guidance counselling, coaching and instructional methods to help people to perform at their best?”**

Please complete this questionnaire segment as honestly as possible as it may help you to improve your ability to coach more effectively (if you feel this represents an accurate picture). The choice scales are as follows:

**1 = almost never, 2 = occasionally, 3 = frequently, 4 = very frequently, 5 = almost always.**

Fill in all the boxes up to the score you select to create a shaded bar.

**This person:**

1. Provides concrete and specific examples to help people understand
2. Actively demonstrates how things could be done in alternative ways
3. Is known for his/her 'straight-talk' approach
4. Openly shows support and offers congratulations when people do things differently
5. Recognises and celebrates people's successes when they occur
6. Offers people new insights into old problems or issues
7. Uses analogies and metaphors to explain what he/she means
8. Aims to give people a context in which to think about situations
9. Follows up with people to see how well they are progressing
10. Helps people focus and build upon their successes
11. Guides people to seek feedback from a wide variety of different sources
12. **Avoids** giving destructive feedback or comments

		Almost Never		Almost Always		
		1	2	3	4	5
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
(Add up all the column scores and divide by 12)		<b>AGGREGATE SCORE</b>				

**INTERPRETATION**

Scales predominantly in the fours and fives ('very frequently' and 'almost always') are likely to mean that this person uses positive two-way feedback as a primary means by which to offer instruction, training, support or general coaching. He or she therefore adopts an open and flexible communication and listening style that allows him or her to watch what people do and to describe ways in which they might improve or be more successful.

Scales predominantly in the ones and twos ('almost never' and 'occasionally') are likely to mean that this person is less communicative in looking to provide coaching to others, or uses feedback in a limited and less interesting way. He or she may occasionally offer inappropriate feedback or criticise performance or individuals without sufficient evidence and without suggesting an approach that the individual may take.

**IMPACT**

A high score person will be likely to offer people 'positive strokes' for their successes and at the same time, offer

insights into how they may build upon or improve their efforts still further. To do this, he or she will point to specific areas that could be addressed and help individuals to identify strategies by which to do so.

A low score person will be likely to fail to offer feedback frequently enough, or to find that individuals do not accept his or her counselling or instructional approach. This arises because feedback is not offered in a variety of creative and different ways. In addition, even good performance is not recognised or congratulated sufficiently.

**ACTION FOR LOW SCORERS**

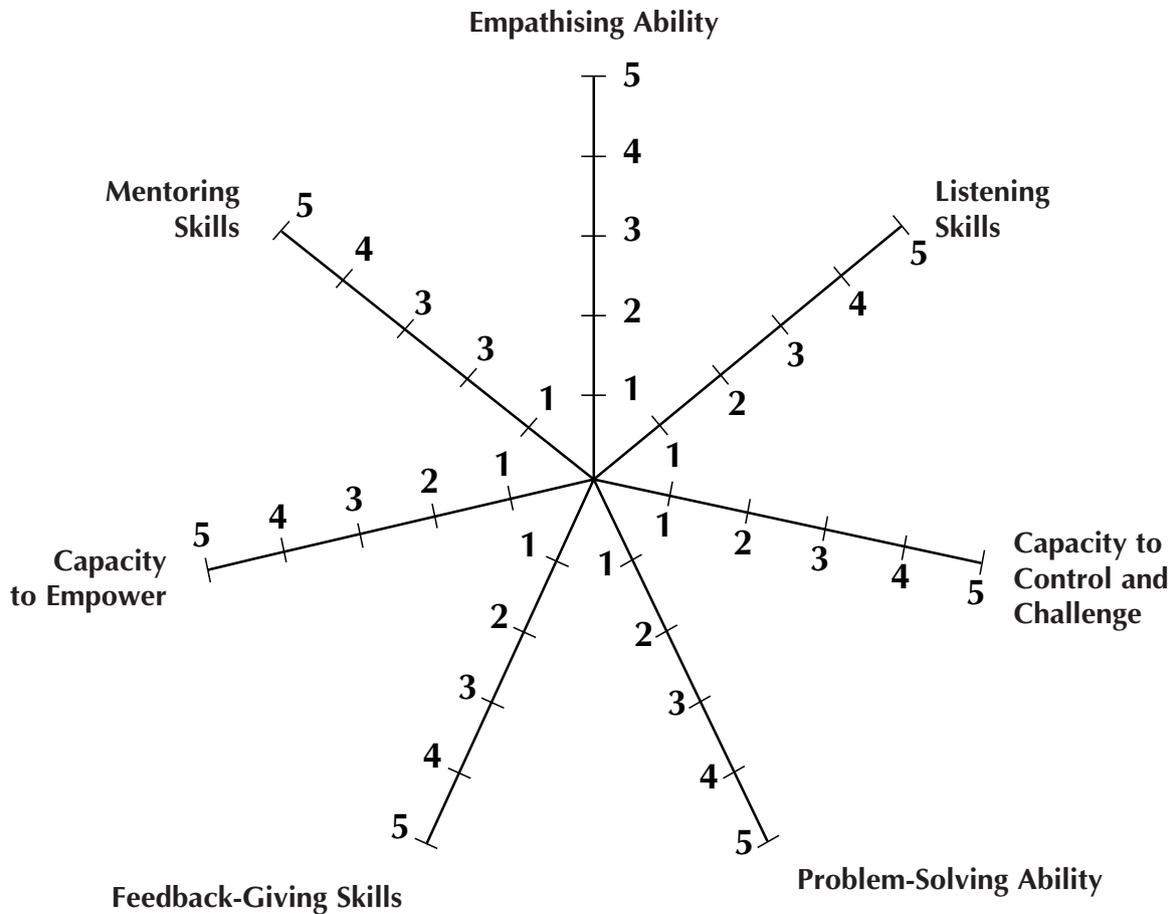
Low scorers need to watch people carefully before offering a range of practical communication and feedback methods that give people praise for their achievements, where appropriate, and opportunities and insights on where they might improve when identified.





# Scoring

Each of the 7 categories on the previous pages is a self-contained mini-questionnaire in its own right. By transferring your AGGREGATE SCORES from those pages and plotting them on to each corresponding axis of the 'spider' diagram below, then connecting the scores, you create a quick diagrammatic view of your overall Coaching Effectiveness Profile. Scores of 4 or better in each category are 'good', scores of 2 to 4 would benefit from further thought and reflection and scores of 2 or less are in need of attention. For general interpretative information on each of the categories, please refer to the table on the following page.



**YOUR TOTAL COACHING  
EFFECTIVENESS SCORE**

**(Add all seven aggregate scores together  
and then divide the total by seven)**

# Improvement Strategies

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There is no single strategy that will suit everyone, therefore you need to develop your own personal action plan (a format for this is provided on page 14). However, general actions relevant to each category are provided here. You should start by focusing your attention on the particular category where you have the lowest score.

<b>Empathising Ability</b>	Aim to be as positive and sincere as possible in all your conversations with people and be sensitive to people's feelings or emotions as well as their words. Try to develop as much trust as you can, make sure that your deeds match your words and that you meet any commitments you make.
<b>Listening Skills</b>	Give people whom you are seeking to coach your full and sincere time and attention, focusing on their needs, and listening for as long as possible with minimal interruption. Play back what you hear from time to time to demonstrate that you have heard properly and have not let your mind wander.
<b>Capacity to Confront &amp; Challenge</b>	Develop a set of useful general questions that you can ask of people to help them reflect upon whether their current approach or actions represent the best they can achieve. Use your questions to encourage people to solicit feedback on themselves from others and to see this as a healthy part of personal growth and learning.
<b>Problem-Solving Ability</b>	Find ways to focus people you seek to coach on facts that they might have missed, and suggest tools and methods that might help their problem or issue analysis process. Guide people towards challenging their assumptions and even the supposed inevitability of some of the outcomes they foresee.
<b>Feedback-Giving Skills</b>	Progressively build logical, clear and concise appraisals of people's performance and find suitable times and places to feed it back to them genuinely and without unduly 'softening' it. Use analogies, metaphors and examples to illustrate what you mean and follow up to make sure your message has been understood.
<b>Capacity to Empower</b>	Look for a variety of new learning opportunities for people around you and describe them without specifying the exact approach and outcomes that could be taken. Support people when they make minor or understandable mistakes and reward hard work, innovation and effort to stretch personal boundaries.
<b>Mentoring Skills</b>	Learn as much as you can about individuals, including their beliefs and values, and gently discover whether mentoring might assist them. Look to create well-matched mentoring relationships by drawing on your own experience or the experience of others who would provide good guidance and support for the individual in question.

# Personal Action Plan

**My overall score is**

**At the following date:** \_\_\_\_\_

**My aggregate scores most in need of attention (in priority order) are:**

	SCORE	CATEGORY
1.	<input type="text"/>	_____
2.	<input type="text"/>	_____
3.	<input type="text"/>	_____

**My specific plans to be more effective in category 1 are:**

	IMMEDIATELY (TICK)	BY WHEN
Step 1: _____	<input type="checkbox"/>	_____
Step 2: _____	<input type="checkbox"/>	_____
Step 3: _____	<input type="checkbox"/>	_____

**My specific plans to be more effective in category 2 are:**

	IMMEDIATELY (TICK)	BY WHEN
Step 1: _____	<input type="checkbox"/>	_____
Step 2: _____	<input type="checkbox"/>	_____
Step 3: _____	<input type="checkbox"/>	_____

**My specific plans to be more effective in category 3 are:**

	IMMEDIATELY (TICK)	BY WHEN
Step 1: _____	<input type="checkbox"/>	_____
Step 2: _____	<input type="checkbox"/>	_____
Step 3: _____	<input type="checkbox"/>	_____

**In overall terms I will cease to do, or reduce my involvement in:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Signed** \_\_\_\_\_ **Dated** \_\_\_\_\_





**Effective coaches bring out the best in other people and inspire them to move forward – whether in their career or personal life. Coaching should provide positive results for individuals, teams and entire organisations.**

This competency-based assessment helps determine your strengths and development needs in seven key areas that will help you become a more effective coach. It includes interpretative information, tips on how you can further develop your coaching ability and a Personal Action Plan to help you move forward.

Although this booklet is primarily designed as a self-assessment, by purchasing extra copies (one for each respondent) it can be used for 180 or 360-degree feedback.

This title is also available in the following products:

- Web based self, 180 or 360-degree assessment
- Instrument Facilitator Guide
- Detailed Coaching Guide
- Short Course Training Kit & Workbooks
- Skill Builder Series booklet
- Desk Pad (Skill Builder templates)
- Storyboards & Posters

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