

LEARNING MADE EASY



2nd Edition

Coaching & Mentoring

for
dummies[®]
A Wiley Brand



Transition from doing work to influencing results

Engage and support a diverse workforce

Motivate employees to grow as leaders

Leo MacLeod

Executive coach, author, and leadership expert

Marty Brounstein



Coaching & Mentoring

2nd Edition

by **Leo MacLeod and Marty Brounstein**

for
dummies[®]
A Wiley Brand

Coaching & Mentoring For Dummies®, 2nd Edition

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Introduction

Welcome to the newest edition of *Coaching & Mentoring For Dummies*. This book can help you grow from a doer manager to a coach and mentor who motivates employees to find purpose in their work and grow as independent problem solvers — without micromanaging them.

A lot has happened in the world and in the workplace since the first edition of this book was published more than 20 years ago. Organizations are struggling to find and keep good people. Workers are exercising their options to pursue new career opportunities, switch jobs, start their own businesses, and retire altogether from working. The rules have changed in which employers compete for talent and employees hold more of the power. With the increasing labor shortage, no organization can afford to lose people, especially good people. Coaching and mentoring employees to support them in work/life balance, fitting in with the culture, and doing their best work has never been more important than it is today.

This book not only helps you understand what it means to be a coach and mentor. It also helps you to adapt and meet the challenges of the changing workplace by altering your role and having a lasting impact in people's lives. Invest in changing yourself and you'll grow as a leader and person.

About This Book

Over my (Leo) 20 years of coaching, training, and consulting managers, I've heard clients often joke: *My job would be easy if I didn't have to manage people*. People-performance issues are complicated and often messy. My clients came to me because they've actively avoided dealing with their staff or else they're too hard and demanding of them. Neither is a good recipe for keeping and retaining people. This book helps you unlock a different way to work and guide people you supervise. You can find out how to

- » Gain or improve the coaching skills that drive employee performance and commitment in diverse workforces
- » Encourage colleagues to deliver results and guide employees to think for themselves

- » Motivate teams both in person and virtually
- » Navigate intergenerational issues
- » Be a sounding board for others and get the best out of your teams
- » Foster mentoring relationships that help employees grow and stay engaged in their careers

The fundamentals of coaching and mentoring haven't changed: Respect people, take the time to get to know them, ask questions rather than tell, be clear, and take a genuine interest in their growth and success.

Here's what's new to this edition:

- » Rapid changes in technology and society mean today's managers need to be accept that nothing stays the same and learn to adapt to continual changes in the workplace. The traditional office environment is increasingly becoming more digital, as more work is done anywhere that has Wi-Fi. Managing teams remotely and creating a cohesive culture continues to present challenges.
- » Recruiting and retaining talent continues to be a top priority for organizations. This edition dedicates an entire chapter on emotional intelligence (EQ), which has emerged as a critical skill for leading diverse teams and creating an attractive company culture in which people can do their best work. EQ can help you understand the role of emotions, behaviors, and attitudes in working effectively with people.
- » Changing demographics and social and political initiatives have made diversity, equity and inclusion (DEI) a front-burner issue for many companies. You'll gain clarity on common DEI terms and find a practical, grounded way to coach and mentor every employee so they feel like they can be themselves and contribute fully.
- » Employees aren't as motivated to help the organization be successful as they are in how the organization can help them achieve their personal and professional goals. Through coaching and mentoring, you'll find ways to give more meaning and balance to employees.
- » Mentorship has evolved beyond the traditional pairing of senior leader with junior staff. Learning from other people takes many forms. A new chapter explores the importance of encouraging employees to develop a diverse support team to help develop in their careers and life.

You have the opportunity to play a much larger role in your organization by helping others by following the principles and strategies in this book. You'll discover that when employees are given the opportunity and supported to do their best work, everyone wins. The journey in becoming a successful coach and mentor starts here.

Foolish Assumptions

When revising this edition, I (Leo) make the following assumptions:

- » You have a basic understanding of what the job of being manager entails. You have the responsibilities for business functions and for the performance of people, not just yourself.
- » Managing and evaluating staff performance is a major part of your job, or you're someone who aspires to take on such responsibilities in your career one day.
- » Your manager told you need to *coach* employees, though you're not sure what that means. Or your employees keep asking how they wish they had managers who could *mentor* them. And you don't want to give them an excuse to go to another company.

Icons Used in This Book

Throughout this book, you may notice small graphics in the margins, called *icons*, which grab your attention. Here are the ones in this book:



TIP

This icon symbolizes practical tips, ideas, and strategies to make your coaching efforts work.



EXAMPLE

The example icon signals a real or made-up story that illustrates a point being discussed or highlights a manager's experience with a coaching effort.



REMEMBER

This icon is a reminder of good ideas or points of information to use when you put coaching into practice.



WARNING

This icon points out areas to watch out for and avoid.

Beyond This Book

There's more than enough to keep you busy with the strategies, tips, templates, and checklists in this book. However, you can find more helpful info online:

- » **Cheat Sheet:** Go to www.dummies.com and type "Coaching & Mentoring For Dummies Cheat Sheet" in the search box to access information you can refer to again and again.
- » **My website (www.leomacleod.com):** You can access free resources and tools for help with managing priorities, delegating, mentoring, and having hard conversations. You can also learn about my online courses, which feature short videos and exercises.
- » **My book:** *From the Ground Up: Stories and Lessons from Architects and Engineers Who Learned to Be Leaders* (Pie House Publishing) is useful to any new leader who struggles with transitioning from doer to leader and still wants work/life balance.

If you have any questions or feedback on the book or want more information on coaching training or speaking, contact me directly at leo@leomacleod.com.

Where to Go from Here

This book isn't linear, so you can glance at the Table of Contents and jump into any chapter that interests you. To get a good foundation, start with Chapter 2, which illustrates the differences between a doer manager and a coach manager. Chapter 4 lays out the fundamentals of what it takes to build commitment in employees. Chapter 5 dives into how to build your emotional intelligence skills, which I can't stress the importance of enough in coaching and mentoring.

Like any book, the information sits on a page until it's put into practice. My suggestion is to carve out specific blocks of time — 15 to 30 minutes — to focus on a chapter. Take notes, use a highlighter, or use sticky notes. Try to apply the strategies in the book and journal (if you like journaling) about your observations and progress.

I also encourage you to find colleagues to discuss what you've learned, the challenges you both face, and what's worked and what hasn't. Buy copies of this book for your management team and host a book discussion group.

Lastly, tons of other Dummies books go into greater depth into areas I touch on in the book. I can recommend two, including *Diversity, Equity, & Inclusion For Dummies* by Dr. Shirley Davis and *Managing Millennials For Dummies* by Hannah L. Ubl, Lisa X. Walden, and Debra Arbit (both by John Wiley & Sons, Inc.).

1 Getting Started with Coaching and Mentoring

IN THIS PART . . .

Explain what coaching in the business world is, particularly how coaching can help you improve the performance of your team, keep them engaged and motivated, and give you some time in your schedule.

Distinguish between a doer manager and a coach manager in your role with employees, how you interact, and how you spend your time.

Help you value your time differently and provide specific time-management strategies to give you time to build commitments and boost performance by staying connected with your staff.

Lay a foundation for building trust, engagement, and commitment from your employees by understanding how to set the right tone and introducing a model for building commitment.

Leverage the power of knowing yourself and others by developing your emotional intelligence (EQ).

Understand how to build strong collaborative relationships that help grow you as a manager and also helps your employee grow.

IN THIS CHAPTER

- » Defining what coaching mean in the business world
- » Previewing the tools of coaching
- » Comparing coaching versus mentoring

Chapter **1**

Understanding Coaching and Mentoring: Just the Basics

You're a manager, possibly a first-level supervisor, middle manager, or executive. Whether you came upon the role recently or have many years of experience, you know that the job of being a manager isn't getting any easier. You carry a great deal of responsibility, and with the pace of change these days, more may be coming your way before you know it.

At the same time, you're expected to lead your group(s) and make them productive. And while you're at it, you have to keep your employees motivated and committed — you can't afford turnover problems.

Trying to do it all yourself isn't working as well as you would like it. Maybe your manager has strongly suggested that you change your approach. "Stop telling people what to do. Start coaching them." You've heard that coaching is a better way to lead people, but you're not sure what that means or where to start.

This chapter lays the conceptual foundation for the book. It introduces what coaching in the business world is all about and delves into its benefits, particularly how coaching can help you improve the performance of your team, keep them engaged and motivated, and give you some time in your schedule for important things that seem to fall by the wayside — like lunch!

Getting the Lowdown on Business Coaching

The business of coaching has grown dramatically in the past 20 years. These days it seems everyone wants to be a coach. But what kind of coach? There are life coaches, relationship coaches, career coaches, and spiritual coaches. All coaching, however, shares a basic orientation to guide people and support people to find their own path.

Coaching, as defined in this book, has two aspects to it:

- » It's an approach to how someone functions in the role of being a manager. In the approach of managing as a coach, the manager operates as the leader, developer, and guide of the team and its individuals.
- » It's a set of management skills aimed at getting the most productivity out of employee performance. These skills or tools require hard work and often, a change in old habits, but they work.

Together, these two aspects of coaching give managers the best tools to deliver results and positively influence employee commitment.

Being a coach means that you see and approach the role of manager as a leader: one who challenges and develops your employees' skills and abilities to achieve the best performance results. In other words, if you manage as a coach, your staff members learn, grow, and work hard, too. Coaching is the pathway for multiplying your effectiveness through others, for getting the best out of people's performance. Managers who have discovered how to do this not only have stronger, more functional teams, but they also sleep better and have more time for more important things in their lives.

The work of developing as an effective coach and mentor starts by understanding how most managers approach managing people and what kind of changes need to happen to make the transition (see Chapter 2 for more on the skills needed for coaching and mentoring).

MY PATH TO EXECUTIVE COACHING

I (Leo) started my career in marketing and advertising. When I was laid off, I fell into consulting, mostly writing, PR, and client surveys. Clients started to see that I had the ability to relate to their employees and make them feel comfortable discussing their problems. This led to beginning to coach people, though I wasn't sure what that meant. I learned from experience, reading, and taking courses to build my skills. Everything I know, however, is from directly helping people with problems: delegating, having hard conversations, managing their crushing workload, motivating teams, listening, learning to communicate clearly and persuasively, and focusing on the best use of their time.

I developed courses with templates and checklists to give people these tools to use. Along the way, I've seen and learned from managers who didn't lead people effectively and others who had figured it out. I made mistakes and learned what sticks and what doesn't and what changes behavior and what you need to be successful as a coach. I've taken my years of hard-earned experience of coaching specific skills and put them into this book. What you have is the effective tools and strategies I've used in my successful business that you, as a manager, can use in managing teams.

The following sections gives you an orientation to all the ways coaching can help you engage and motivate employees.

Sneaking a quick look at the tools of coaching

Understanding and putting coaching tools into practice is a critical step in becoming a coach. Here's a quick look at various coaching tools, all of which I cover throughout this book:

- » Setting goals and performance plans (see Chapter 15)
- » Giving constructive performance feedback (see Chapter 14)
- » Conducting periodic performance reviews (see Chapter 16)
- » Guiding development through mentoring and tutoring (see Chapter 18)
- » Coaching with questions (see Chapter 11)
- » Taking employees under your wing
- » Motivating employee performance
- » Delegating to empower and increase productivity (see Chapter 13)

- » Training for skill development
- » Stimulating and supporting career development (see Chapter 17)
- » Intervening to build improvement in performance

The focus of these 11 coaching skills is on performance, which is the emphasis of coaching — getting the best out of people’s performance and helping people grow in their careers.

Coaching applies to any personality type, and although it does involve building working relationships, the nature of those relationships varies by individual. Some employees need pushing and firmness; others need little direction and a light touch. Sometimes you need to give direction and other times support. That is, the use of the coaching skills or tools is tailored to fit individual skill levels and needs.

You carry out these coaching skills through conversation and collaboration. These skills involve working with an employee in order for that person to go back to their job and perform successfully. Dedicating focused time to coach people is the key (refer to Chapter 3).

Getting on board with coaching

Do any one of the following challenges and pressures affect you in your job as a manager?

- » Do more with fewer resources.
- » Get employees to adapt to change.
- » Find ways to increase efficiency and productivity.
- » Create an environment to retain employees.
- » Meet greater customer expectations.
- » Deliver results.

Thought so. In today’s increasingly fast-paced, ever-changing, and highly competitive environments, demands such as these are affecting many organizations — especially their managers. Demands and pressures cut across all types of businesses — private and public sectors, for-profit and nonprofit enterprises — and across all levels of management, from the top executive to a newly promoted first-level manager.

Yet what hasn't always kept pace with all these changes and expectations is the way that managers manage. Far too many managers still operate in a task-focused or a must-maintain-control fashion. If I just do more hands-on myself and tell everybody to do more, and everyone will get along just fine, right? Or I can toss in a few buzzwords or phrases to help: "All right everyone, you've been empowered. Now work smarter, not harder." The problem is, managing this way just doesn't work.



TIP

Because today's challenges aren't going away, managing as a coach is a necessity not only for your success, but also for your survival. Coaching is about helping others become more effective, developing employees to perform to their best ability and to function as self-sufficiently as possible, and challenging employees to take on responsibility instead of waiting to be told what to do. It also means supporting and involving your employees in the process.



REMEMBER

Coaching influences employee adaptability, productivity, and retention. It helps you make better use of your time. But many new and different efforts are needed. The road to success starts by making the shift from managing as a doer to managing as a coach. Read Chapter 2 to understand the differences.

Differentiating between Coaching and Mentoring

In the business world, the terms *coaching* and *mentoring* are often used synonymously. Here's how this book distinguishes the two:

- » **Coaching:** Coaching is a set of skills to interact and empower employees to be more self-sufficient problem solvers. Unlike other forms of coaching, the focus here is on job performance — what's needed and expected in this position. A coaching approach can be used in mentoring employees by asking questions and engaging them, but the primary focus here is helping them do their job.
- » **Mentoring:** Mentoring is more focused on supporting the employee in their own development as a professional. It's often driven by the employee's needs rather than the demands of the job. It can include learning from a more senior person to fill in gaps in knowledge. But mentoring often goes beyond teaching someone by taking them under your wing. Mentors often advise and support people on their career and life. The focus isn't just on performance but on the needs of the employee.

Coaching and mentoring often work together, and the lines aren't always clear. Here are some examples to help you see how the roles play out:



EXAMPLE

Judith was a new hire at a marketing agency. Her role was to support the client managers with administration of social media campaigns. Judith's experience was limited to doing some case studies in college. She didn't understand what to do. Her manager, Samantha, sat down with her to explain what was expected and how to be successful at the agency. She asked Judith questions to understand her experience and career goals.

Samantha could see that Judith was feeling overwhelmed. She suggested that for the first week that Judith just observe more experienced people doing the tasks. She bonded with Jack, who was also fairly new. Jack and Judith went out to lunch, and Jack played an important role in helping her feel comfortable.

Samantha played more of a coaching role in guiding and engaging Judith. Her meetings were intentional; they were goal oriented toward getting her up to speed. She used a lot of questions to learn about Judith and took time to spell out the expectations. Samantha also suggested a course of action that would help Judith learn gradually.

Jack, on the other hand, played more of a mentor for Judith. He taught her his approach by letting her observe. He waited for her to ask questions. It was relaxed and friendly and gave Judith someone she could start to confide in. The relationship was more balanced. Jack was there for her, but he didn't have an agenda other than to help her with whatever she needed.

As this example illustrates, coaching and mentoring are both valuable tools. And like any tool, it all depends on the specific need. A wrench and pliers are similar, but one is better in certain applications. Flip to Chapter 2 to look more closely at the role and approach that coaches take. For more information on mentoring, check out Chapters 18 and 19. Coaching and mentoring share the same end goal: to help and support the employee's growth.

- » Contrasting doers versus coaches
- » Making the change to managing as a coach
- » Appreciating your changing role

Chapter 2

Switching from Doer to Coach

This chapter explains why the switch from doer to leader is important but often difficult. It helps you distinguish between a doer and a coach in everyday practice and how you can begin to make the switch. You may want to return to this chapter to see how you're doing in making the transition. Pace yourself. It's natural and too easy to slip back into the doer role.

Managing as a Coach versus as a Doer

Coaching is an approach to management: how you function in the position of a manager. Although different leadership or management styles exist, how managers approach their roles tends to be one of two ways — as a coach or as a doer. The following are descriptions of how the two approaches generally function:

- » **Coach approach:** Managers work to achieve the best operational performance results by developing and maximizing the talents and abilities of employees to their fullest.

Those who manage as a coach still perform tasks; in fact, many work alongside their staffs doing some of the same duties. Yet those who approach management as a coach recognize they also need to lead and develop others to top performance, because that is how the tasks best get done. Such managers live by the principle of *and*; that is, they approach their jobs as a balance of managing both task issues *and* people issues. They see the two as connected. They see managing people as part of managing the work the people do.

» **Doer approach:** In this approach, managers tend to focus more on task issues of the job (and also the technical issues of their work), as well as on the group's performance. Their attention tends to go first to the things they themselves have to do and to the areas of greatest comfort — task and technical issues. Doers, as a result, tend to function as senior individual contributors.

While the style of doers varies from controlling to very hands-off to a combination of the two, the doer approach to management tends to live by the principle of *or*. They have task issues to handle *or* people issues to handle. These issues are often viewed as separate sides of the manager's role rather than interrelated ones. So doers tend to put much less emphasis on how people are performing, which is usually less comfortable to deal with, than on getting things done.



REMEMBER

A common feature of both management approaches is that managers have their own tasks to perform. Few ever focus solely on managing others. The key difference in the two approaches, however, is on where a manager focuses their attention.

Table 2-1 gives you a quick preview of the tendencies that coach and doer managers exhibit when handling six of the most common management functions. To help you see this difference in greater detail, the following sections illustrate how managers using the two approaches would handle various functions. (As you check out the general tendencies of each approach, keep in mind that general tendencies mean just that; things don't work exactly the same way all the time.)

TABLE 2-1

Coaches versus Doers: Approaches to Management Functions

| Management Function | Coach | Doer |
|--|--|--|
| Planning | Invests time in doing it. | Has little time for planning ahead. |
| | Often involves others in shaping plans. | Tends to operate on a day-to-day or short-term basis. |
| | Is future-focused. | Often crisis-driven and fire-fighting. |
| Goal setting | Works with others to develop goals and plans to achieve them. | If operates with goals, tends to give staff their goals — little employee involvement. |
| | Ensures that goals are written and expectations are clear, and then manages by them. | Often tends to be activity- and task-oriented as opposed to results- and goal-driven. |
| Giving performance feedback | Does so on an ongoing basis. Feedback is tied to what employees are doing. | Seldom, unless something goes wrong, or gives occasional, vague praise. |
| | Provides both positive and negative feedback so staff knows where they stand. | May do so at annual review time. |
| Dealing with performance issues | Addresses issues in a timely way with solutions-oriented approach. | Many avoid dealing with these issues. Is outside of comfort zone. |
| | Works with employees to map out plans for improvement. | May seek punitive measures as the first action to deal with problems. |
| Delegating | Does so as much as possible to maximize resources and increase productivity. | Finds letting go of responsibility to others hard to do and thus delegates little beyond simple tasks. |
| | Provides necessary support, lets people handle the job, and holds them accountable. | If willing to delegate, dumps assignments — gives little guidance and support. |
| Mentoring and developing staff | Takes an active interest and involvement in employee learning and growth. | Tends not to put much attention in this area. |
| | Supports training and encourages opportunities to expand employee capabilities. | Takes a learn-on-your-own approach to employee development. |

Planning

Planning is a critical management function that entails looking to the future and setting a course of action to get there. Here's how the coach and doer deal differently with planning:

- » **Coach approach to planning:** The manager as coach takes time to plan — after all, you don't get ahead unless you plan ahead. The coach realizes this and doesn't just focus on what's happening now, but constantly looks to the future and often involves others in shaping plans to reach future goals. This future-focus is often part of the conversation that a coaching manager has with their staff.
- » **Doer approach to planning:** The doer manager tends not to spend much time planning — too much to deal with now to worry about that later-on stuff. Doers tend to have a day-to-day focus, reacting to the problems at hand and incurring frequent interruptions. In other words, their days are often full of other people interrupting them with one problem after another. Crisis management and fire-fighting is the norm. "I don't have the time to plan" is a common complaint of doer managers.

The coach manager can sometimes fall into this reactive mode. However, when a coaching manager senses that people are getting caught too much into fire-fighting, they'll coach them on fire prevention.

Goal setting

Goal setting is defining what needs to be accomplished in performance to achieve desired results. Here's how the two approaches differ:

- » **Coach approach to goal setting:** The coach manager often involves group members in shaping the group's goals and most definitely works with individual team members so that they know what their individual goals are. When you work for someone who manages as a coach, you know what your priorities are and what's expected of you. In fact, goals and plans are usually written so that no one has to rely on memory.
- » **Doer approach to goal setting:** If goals exist, the doer approach tends to give people their goals. Less time is spent discussing and working together to shape goals and plans.

In many cases, no set or articulated goals exist. Doer managers tend to be more task-oriented than goal-focused. They know what needs to get done now and maybe in the near future. But goals are the bigger-picture stuff — a series of tasks that together accomplish an end result. Goals are about