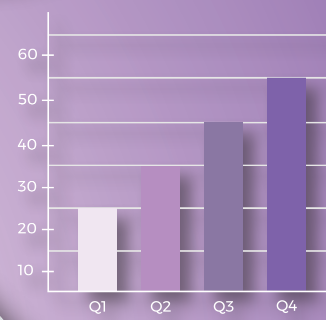
Sri Lankan Hospitality and Tourism

Professional Business Coaching Course



ASSESSMENT TOOLKIT

Australian Aid

Skills for Inclusive Growth

FCCISL Sri Lanka

Skills for Inclusive Growth

Skills for Inclusive Growth Program is an initiative of the Australian Government in partnership with the Sri Lankan State Ministry of Skills Development, Vocational Education, Research & Innovations. It is implemented by Scope Global.

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Contact Person

Farheen Khurrum - Contract Representative
Scope Global
Level 5, 12 Pirie Street, Adelaide, SA, 5000, Australia
Tel: +61 8 7082 1431
Farheen.Khurrum@scopeglobal.com

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Foreword

The COVID-19 pandemic has seriously impacted earnings and growth of small businesses the world over. Policy makers and business analysts continue to discuss how best to assist business enterprises to reposition and adapt themselves in light of this global crisis situation and be able to emerge as successful, quality businesses that can also contribute towards our country's prosperity.

Given these conditions, the need for the enhancement of business coaching skills was seen as a necessity in the local micro, small and medium scale business enterprises (MSMEs) sector. In this regard, a business coaching model used worldwide has been re-aligned to our local needs and tested on the ground with diverse communities, especially with a focus on the tourism sector. The local tourism sector has much potential for success, countrywide, including in the regions. Small businesses have the ability to provide world-class services that will attract more high-end tourists and enhance the reputation of the country as a key tourism destination, worldwide. Therefore, this new coaching model, with its customised curriculum to cater to the needs of local enterprises in the tourism sector, is particularly significant as we plan for post-Covid enhancement of tourism activities.

Business Coaching has become widely respected as a service supporting Owner/ Manager development and business performance improvement, globally. The coaching initiative that is proposed within these pages involves one-on-one mentoring through which managers are guided to align business planning with practical work activities that will enhance their businesses in diverse manners. Coaching enables business owners to be successful and uplift performance in ways that are measurable and sustainable.

FCCISL is pleased to announce that a business coaching course is now available for small businesses in the tourism sector in Sri Lanka, with the launch of the Professional Business Coaching Course. FCCISL has contributed towards the development of this Course and will support coaches to access tourism related small businesses to support their growth and development. Business coaches that complete the training requirements will be recognised by FCCISL and be encouraged to deliver services to support business improvement in the hospitality industry. The launch of this course will contribute to upskilling and enhancement of small-scale business owners and employees in the leisure industry, leading to the creation of a business service for those in MSMEs. With the launch of this course, initially we plan to produce twenty coaches in a batch. Subsequently we will up scale this as necessary, with the feedback received and as the industry requirements are further understood.

Selected from key accredited institutes, the course training providers will utilise a training methodology that is largely performance driven and combines a unique model of on-the-job training, quality-enhancement inputs, access to professional development, and mentoring.

Coaching is an opportunity for experienced business operators to undertake training to receive accreditation and be recognised. A business coach will be able to deliver services to business enterprises on a fee-for-service basis. Initially coach training will be offered at a subsidised rate and those who successfully complete the training will be supported to establish links with the small business communities across Sri Lanka.

FCCISL supported and assisted the Skills for Inclusive Growth program in pilot testing the business coaching service with 80 business enterprises in the tourism value chain. The results have been impressive with 89% of businesses reporting improved revenue and performance, 75% of businesses developing e-marketing channels and operations through this methodology, which has generated new employment in local communities. FCCISL boasts of around thirty thousand members in its fold. I encourage experienced businessmen and women from among them to undergo this training to enhance their skills, leading to better performance and economic prospects.

FCCISL has collaborated with the Australian Government funded Skills for Inclusive Growth program to support this business coaching service in Sri Lanka. It has allowed us to benchmark this Business Coaching model and training course with successful models available in other countries. As we launch this Professional Business Coaching Course for MSMEs, I would like to thank the Australian Government and specifically the Skills for Inclusive Growth project for being with us throughout this process.

We also wish all success to the trainers and trainees who will benefit from this course. We hope that they will join us to upkeep these quality standards as we drive the industry to greater heights in future.

Thank you.

Secretary General/CEO
FCCISL, Colombo 8

Content

About The Course

This course teaches students how to become business coaches. It combines classroom and theoretical knowledge with practical experience. At the end of the course, students should feel confident in their ability to become a business coach. It equips them with the skills, capability and knowledge to help others succeed.

Business coaching is used to enhance individual and company performance. That is, to take the business from where it is now, to where the client wants it to be. A business coach works with entrepreneurs and business leaders to identify and achieve goals, increase productivity and effectiveness.

The Professional Business Coaching Course is divided in two components, the theory, and 100-hours practical coaching experience. On completion of both sections, participants can become qualified.

About This Assessment Toolkit

This Assessment Toolkit contains 14 Sections that provide the assessment criteria and tools to carry out assessment of the knowledge and practical components of the course.

This Assessment Toolkit is accompanied by the following training resources that support the delivery of the course.

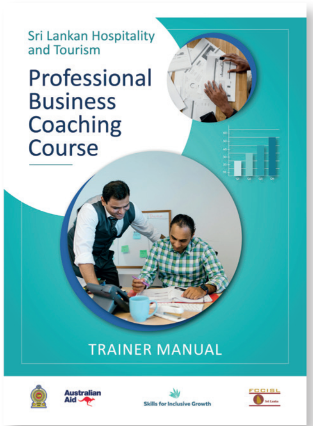
Trainer Materials

- **Trainer Manual & Resources** - Guidance for trainers who are delivering the course, activity handouts & powerpoint files.

Participant Materials

- **Participant Workbook** - The workbook that students use to follow the course materials and make their notes as the course progresses.
- **Portfolio** - For assignments and practical experience activities
- **Coach Handbook** - A reference book on how to become a coach
- **Coach Toolkit** - A collection of ready-to-use business and coaching tools that will help coaches in the structured delivery of business coaching

Course Documents

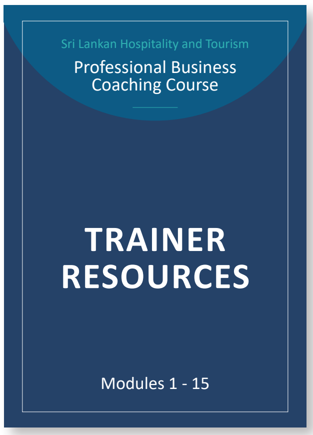


Trainer Manual

Instructions for running the course.

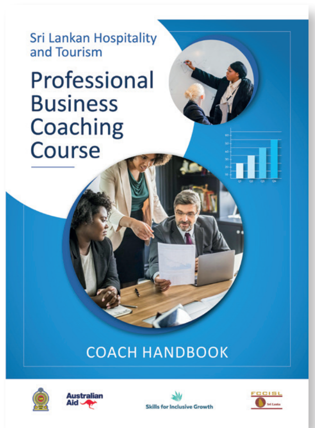
Assessment Toolkit

All components for the assessment



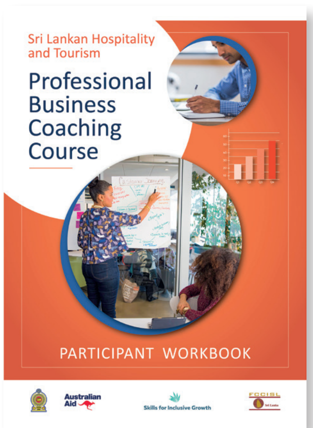
Trainer Resources

Course resources for delivering training activities.



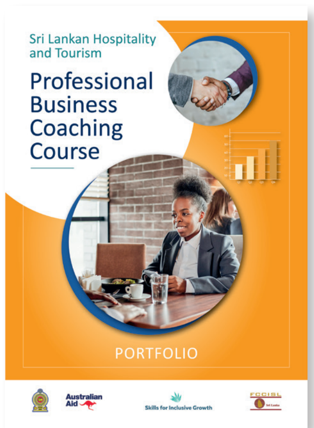
Coach Handbook

Reference guide to business coaching



Participant Workbook

Individual workbook for the course



Portfolio

To record progress during the course and practical coaching experience

Coach Toolkit (Ebook)

Templates and tools for use in business coaching

How to Use this Assessment Toolkit

This Toolkit is laid out in a logical order so read it from start to end. It attends to both the theory, and 100-hours practical coaching experience components. On completion of both sections, participants can become qualified.

The front section provides the foundational assessment criteria and assessment tools. This is followed by resources to support the assessment.

The assessment strategy and rationale should be read first. The strategy provides context to the assessment approach based on the practical nature of learning the coaching skill. Refer next to the assessment syllabus, which provides the module and activity outline, assessment tasks, and learning outcomes to be assessed.

The assessment procedure provides the instructions for:

- Pre-course assessment
- Course assessment
    - Theory
    - 100 hours practical component

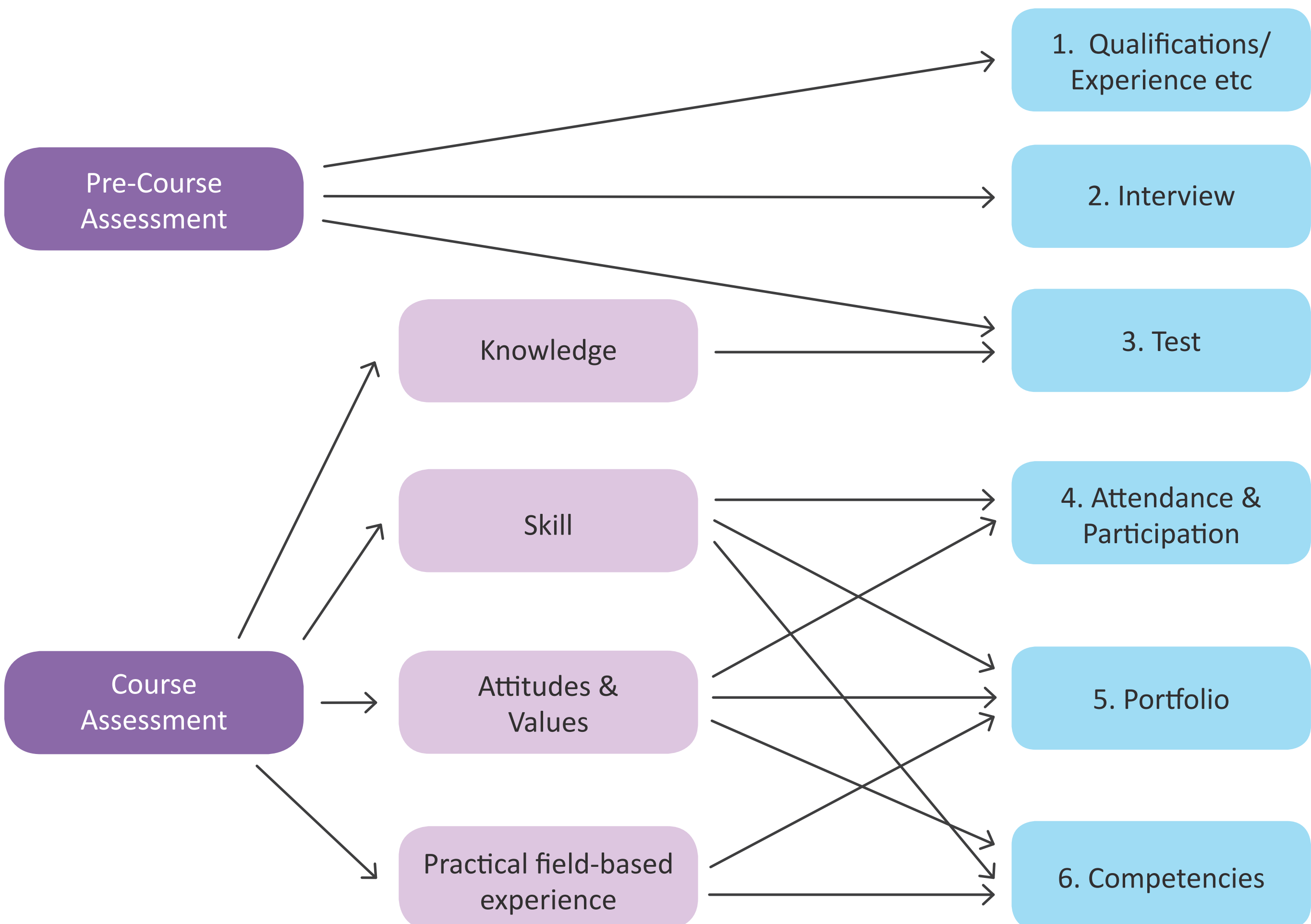
Portfolio assignment tasks and forms can be provided to participants in Word document format. They can fill these and submit their work via the internet.

1. Assessment Strategy

Coaching is a practical activity, and relies on learning by doing to gain experience and develop. As such, assessment of practical field-based experience after the completion of the face-to-face course will be important. Naturally, effective practice is grounded in knowledge and skills, and so these are both assessed during the initial face-to-face part of the course. An effective coach also needs to demonstrate certain (though not proscriptive) attitudes and values, which will also be assessed.

Assessment starts before any course. **Pre-Course Assessment** is used to determine who should be admitted to the course of study. **Course Assessment**, conducted during the course, can be formative (when it is used to adjust future course assessment) or summative (used to capture the degree of knowledge and/or skills gained). Summative assessment is not necessarily kept to the end of any course, it can be conducted during as well as at the end of a course. Assessment done during the course will be both summative, in that scores will be kept and count towards a final grade, and formative, in that participants will receive feedback on their performance and will be able to adjust where necessary.

The following table lays out the approach to assessment in graphic form. The six components of assessment in the right hand column are explained more fully in a table below, where it is laid out why assessment will be held through this tool, as well as when and how.



Licensing (provided by others) will be dependent on fulfilling assessment criteria during the course, including the taught part of the course and the field-based practical experience. This is dealt with more fully in a separate document.

	Assessment Component - Rationale
1	**Qualifications/Experience** are often used, in many fields, as a first screening to see if a candidate should be taken forward to interview. This is the case in academic and training situations, to ensure candidates can cope with the materials and will be able to contribute and learn collaboratively. This is a purely paper-based exercise. Suggested minimum and preferred levels of qualification and experience are suggested here, which training institutions will want to adapt to fit with their existing systems.
2	An **interview**, ideally but not necessarily face-to-face, is usually considered necessary to finally determine the suitability of a candidate, if only to confirm the veracity of claims made in and impressions gained from an application. It is also the first chance to assess suitability in terms of aptitude, attitude, and values. Structure in an interview provides reliability, by standardising the questions for all candidates. Some suggested questions are supplied, along with suggestions on how to rate answers. Again, training institutions will want to adapt this to fit with their existing systems.
3	A **test** is an objective, rather than a subjective assessment tool, and a means of assessing knowledge, more than practical skills. As knowledge can underpin practical skills, it is appropriate to use testing, but in a lesser role. A multiple choice test will be administered before the course begins (it is done pre-course but is not a part of pre-course assessment, hence the light blue line) and again at the conclusion of the course; the same test after 4 months. Development of knowledge is therefore quantified. The final will count towards the participants' assessment, while the difference between the two scores will be a measure of course effectiveness.
4	**Attendance and participation** are important as, clearly, you cannot benefit from a course you do not attend and even if you do attend, if you do not participate, you will not benefit. You may even hold others back. How you participate and interact with others on the course is also an indication of the attitudes and values that will be taken on client visits. Attendance is an objective measure, participation more subjective. This area is the one most likely to be subject to the policies of any particular training institution, and so no tool is provided here.
5	The **portfolio** is the core of the assessment component. Portfolios offer a 'holistic qualitative evaluation method' (Roman & Raoul, 2016). A portfolio 'contains a purposefully selected subset of student work' (Mueller, 2018), the selection being driven by the purpose of the portfolio. The portfolio will be run through both the face-to-face and the field-based practical experience components of the course. During the face-to-face part of the course the portfolio will comprise a set of assignment tasks to be completed as homework, one after each module. Sometimes there will be a choice between two tasks, sometimes one task only. Tasks will be mostly practical in nature, and involve real situations in which the participant has the chance to try out skills and knowledge from a module, and reflect on the experience.

5 cont.	Additionally, as part of the portfolio, a self-reflection learning log will be completed weekly. In this each participant will reflect on his/her learning from both the week's session, and take a wide-angled view of the overall learning experience. The portfolios will be collected for assessment after every third module, and each participant will receive feedback. In this way the portfolio becomes formative as well as summative. After the face-to-face component of the course a participant moves to the field-based practical experience component. The portfolio continues but the learning log element is now most prominent, and is partly used to report on competencies (see below) as, during the 100 hours of practical work, more and more of these are realised. The portfolio will also be a repository of best work from the 100 hours of practice, reports, or forms, or letters, for example. An assessment portfolio monitors progress towards identified outcomes and achievement of competencies. This will be especially in the first part. It will also double as a showcase portfolio (in the second Part). Here candidates include samples of best work, which demonstrates competence and can be useful post-course.
6	A successful coach will demonstrate certain **competencies** key to the role. Some will be behavioural, some may rely on knowledge, but most will be practical in nature; skills based. Well written competencies can make what would otherwise be a highly subjective assessment far more objective. There are 30 competencies. A core collection of 12 will be used in the simulation day at the end of the face-to-face component of the course, both as an assessment tool and to inform participants on areas in which they could benefit from a focus in the more immediate short-term as they start field-based professional practice. As participants engage in the simulation tasks, their trainers will assess them against the competencies. The broader list of 30 competencies will be used for self-assessment and as a kicking off point for self-reflection during the 100 hour practical component.

Alongside the assessment components there will need to be a 'Resit & Remediation Strategy'. As with the attendance and participation component, this is likely to change hugely from institution to institution, and therefore is not offered here. Each institution will need to consider if its existing policies are suitable for this course, or whether adaptation is necessary.

References

Mueller, J. (2018). Portfolios. Retrieved from Authentic Assessment Toolbox: http://jfmueller.faculty.noctrl.edu/toolbox/portfolios.htm

Roman, I., & Raoul, R. (2016). The Implementation of Different Types of Portfolio in the Assessment of Student's Knowledge and Performance. In The European Proceedings of Social & Behavioural Sciences (pp. 807-815). The Future Academy.

2. Assessment Syllabus

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 1: What is Business Coaching?	6 hrs	Week 1 240 min Week 2 130 min	M1-1 Course Introduction and Expectations M1-2 An Overview of Coaching	**Portfolio assignment tasks:** 1. **Task**. Prioritising & contextualising reasons for a client to take a coach. 2. Self-reflection learning **log** (x2).	4, 5, 8, 27 3, 15
			M1-3 Why Sri Lanka Needs Coaching	**Test**: two questions, concerning networking and ways of working.	8, 11, 16 & 1, 2, 8
			M1-4 What is a Business Coach? M1-5 Why Become a Business Coach?	**Competency**: Understands the roles of a business coach and applies those roles appropriately in their relationship with the client, with a focus on coach rather than trainer or counsellor.	8
			M1-6 The Benefits of Coaching M1-7 The Coaching Model	**Competency**: Generally displays the qualities of a successful business coach; being a good 'people person'; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.	8
			M1-8 The Portfolio and Learning Log	**Competency**: Reflects on their experiences as a business coach and draws appropriate conclusions from those reflections. Implements lessons learned.	8

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 2: The Basics of Coaching	5 hrs 05 min	Week 2 95 min Week 3 210 min	M2-1 : The Coaching Journey M2-2 : The Roles of coaches M2-3 The Qualities of coaches M2-4 : Coach's Role: Building Resilience M2-5 : Coach's Role: Helping Insight M2-6 : A Code of Ethics	**Portfolio assignment tasks:** 1. **Task**. Write and explain 10 Ethical Principles to commit to **OR** Describe 3 personal qualities participant has displayed in work context 2. Self-reflection learning **log** (x2).	2, 4, 9, 11 2, 9 3, 15
				Test: two questions, concerning re-framing & Outside-In V Inside-Out	5, 12, 13 & 23
				Competency: Asks the clients useful and enlightening questions which help them find their own solutions / make their own decisions.	7, 24
				Competency: Manages time efficiently, both time with client and time preparing/following up.	5, 13, 38
Module	**Duration**		**Activities**	**Assessment**	**Outcomes Assessed**
	Time	**Week(s)**			
Module 3: The Coaching Model	6 hrs	Week 4 (240 min) Week 5 120 min)	M3-1 : Introduction to the Coaching Process M3-2 : Focus on Topic M3-3 : Focus on Goal M3-4 : Focus on Reality M3-5 : Focus on Obstacles/ Options	**Portfolio assignment tasks:** 1. **Task**. Research Topic & Current Reality of a business, and build SWOT analysis 2. Self-reflection learning **log** (x2).	8, 19, 21, 34, 36 3, 15
				Test: four questions concerning SMART objectives, KPI definition, SWOT & TGROW/OSKAR	21, 35 42 16, 20 & 32, 33

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 3: The Coaching Model			M3-6 : Focus on Way Forward M3-7 : Measuring Performance	**Competency**: Uses a suitable variety of question types to understand the business situation.	16, 22, 35
				Competency: Is able to assist a client make goals/objectives that are genuinely SMART.	21, 22, 35
				Competency: Endeavours to collect data and opinions on a business from a variety of sources, not merely the client.	20
Module	**Duration**		**Activities**	**Assessment**	**Outcomes Assessed**
	Time	**Week(s)**			
Module 4: Managing Change	2 hrs 45 min	Week 5 (90 min) Week 6 (75 min)	M4-1 : What is change? M4-2 : The business life cycle and the theory of managing change M4-3 : Case studies M4-4 : Role plays	**Portfolio assignment tasks:** 1. **Task**. Analyse stage in Business Life Cycle of a business, and agree with owner/manager **OR** Use current knowledge of overcoming resistance to advise management in a previous job how better to bring change. 2. Self-reflection learning **log**.	43 44, 46 3, 15
				Test: two questions, concerning Vision & resistance to organisational change.	43, 44 & 45
				Competency: Refers to a client's vision to maintain a focus on advancing the business and/or maintain morale and motivation.	45
				Competency: Is aware of potential resistance to change from various stakeholders and assists client in considering this factor.	43

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 5: Diversity and Inclusion	4 hrs 30 min	Week 7 (120 min)	M5-2 : Marginalisation in Your Community M5-3 : A Look Inside Yourself : Privileges and Marginalisations M5-4 : Changing perceptions through time - Models of Disability M5-5 : Barriers faced by People with Disabilities and Women in Sri Lanka M5-6 : Analysis: Case Studies - Success Stories M5-7 : The Business Case for Hiring Diverse Groups M5-8 : Changing Mindsets - Dealing with Resistance	**Portfolio assignment tasks:** 1. **Task**. To seek to experience and describe the lived experience of people with disability 2. Self-reflection learning **log**.	14 3, 15
				Test: two questions, one on how widespread disability is in Sri Lanka, and one on the United Nations' model for disability.	14
				Competency: There are no competencies attached to this module.	n/a

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 6: Communi-cation Skills	5 hrs 45 min	Week 7 (100 min) Week 8 (245 min)	M6-1 Warmer: Barriers to Effective Communication M6-2 Miscommunication : A Personal Scenario M6-3 What is Effective Communication? M6-4 The Four Communication Skills M6-5 How Well do you Communicate? M6-6 Active Listening Experiential Role Play M6-7 10 Steps to Effective Communication M6-8 Active Listening Techniques: Paraphrasing and Echoing M6-9 Body Language M6-10 Questioning Skills M6-11 Final Role Play	**Portfolio assignment tasks:** 1. **Task**. Two-part task reporting on practice of listening skills in particular 2. Self-reflection learning **log** (x2).	1, 7 3, 15
				Test: One question about listening skills.	1
				Competency: Is able to use active listening skills to ensure effective communications	1

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 7: Building Successful Relation-ships	5 hrs 30 min	Week 9 (240 min) Week 10 (90 min)	M7-1 Putting Yourself in the Client's Shoes M7-2 Building Rapport M7-3 First-Day Steps M7-4 The Ideal Client and Coach M7-5 Demonstrating Empathy M7-6 The Coaching Agreement M7-7 Role Play - Your First Meeting with the Client	**Portfolio assignment tasks:** 1. **Task**. Three reports on practicing communication skills and focussing on building rapport in conversations. **OR** Analysing what creates or inhibits the building of trust. 2. Self-reflection learning **log** (x2).	1, 2, 6 2, 4, 6 3, 15
				Test: three questions concerning rapport, first coaching day & empathy.	1
				Competency: Shows awareness of how to create connection with people and is able to build rapport with the client.	2 1, 2, 15 & 2, 4, 6
				Competency: Is aware of the qualities and behaviour needed to nurture trust in a relationship and is able to build that with the client	2
				Competency: Is able to understand the differing roles of the client and coach and is able to convey this clearly on the first day meeting.	4, 9
				Competency: Is able to work collaboratively with the client and gently steer meetings to agreement.	4, 10
				Competency: Is able to respond with empathy to the client if the need arises	2, 4, 6

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 8: Key Perform-ance Indicators	2 hrs 45 min	Week 10 (185 min)	M7-1 Putting Yourself in the Client's Shoes M8-1 : Acronym memory test M8-2 : Adapting KPIs M8-3 : Case Studies M8-4 : Using Data to Measure Performance with KPIs M8-5 : KPI Summary	**Portfolio assignment tasks:** 1. **Task**. 2 OPIs to be adapted to better suit a client's needs/ situation,with justification. 2. Self-reflection learning **log** (x2).	22, 31, 42 3, 15
				Test: (covered in Modules 3 and 9)	n/a
				Competency: Helps a client understand the importance of KPIs to measuring performance.	42
				Competency: Works with a client to select, adapt or design KPIs.	19, 20, 22, 31
				Competency: Can use raw data to design a KPI and measure performance against it.	19, 20

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 9: Business Coaching in Practice	5 hrs 25 min	Week 11 (215 min) Week 12 (110 min)	M9-1 : The Coaching Journey and TGROW - a Reminder M9-2 : The Basic Information Form and Researching Your Client M9-3 : The Client's Basic Information M9-4 : The Baseline Profile Form	**Portfolio assignment tasks:** 1. **Task**. Review of 5 forms used in the Coaching Journey, purpose, potential problems and solutions, adaptation. 2. Self-reflection learning **log** (x2).	12, 36, 22 3, 15
				Test: Two questions concerning Fishbone Analysis & areas for building KPIs.	20, 21, 22 31, 42
				Competency: Keeps clear records to track and inform progress of coaching.	25, 31, 34, 36

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 9: Business Coaching in Practice	2 hrs 45 min	Week 10 (185 min)	M9-5 : Tracking KPIs M9-6 : The Action and Skills Development Plan M9-7 : Training Interventions and Skills Development M9-8 : The Coaching Activity Report	**Competency**: Steers client towards identifying goals, setting objectives and designing KPIs, and does not dictate these to client.	21, 26

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 10: Giving Feedback	5 hrs 25 min	Week 12 (100 min) Week 13 (225 min)	M10-1 Providing Effective Feedback M10-2 Types of Feedback M10-3 Barriers to Feedback M10-4 Ways of Guiding your Clients M10-5 More Feedback Practice M10-6 Overcoming Feedback Challenges M10-7 Final Session	**Portfolio assignment tasks:** 1. **Task**. Review of 5 forms used in the Coaching Journey, purpose, potential problems and solutions, adaptation. 2. Self-reflection learning **log** (x2).	3, 15
				Test: three questions on giving feedback.	37, 39 37 & 37
				Competency: Tailors feedback appropriately according to different clients, client needs and business situations.	39
				Competency: While giving feedback, exhibits qualities that are conducive to the giving of effective feedback, such as asking appropriate questions at appropriate times.	37

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 11: Business Leadership Skills	6 hrs	Week 14 (210 min) Week 15 (150 min)	M11 - 1 What is Leadership M11 - 2 Leaders and Decision-making M11 - 3 Leadership Attributes M11 - 4 Leadership Styles M11 - 5 Motivating the team M11 - 6 Resolute Leadership	**Portfolio assignment tasks:** 1. **Task**: 2 parts; part a describing & analysing decision making methods, part B describing & analysing an instance of resolute leadership. 2. Self-reflection learning **log** (x2).	12, 18, 24, 29 3, 15
				Test: one question on the consultative method.	21, 43
				Competency: Assists client to understand the meaning and significance of being resolute, and act in such a manner at appropriate times.	28, 43, 46

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 12: Growth Mindset	4hrs 15 min	Week 16 (255 min)	M12-1 Personal & Professional Development M12-2 Growth Mindset versus Fixed Mindset M12-3 Self-awareness M12-4 Values M12-5 Modes of Learning M12-6 Your Client's Learning and Growth Needs	**Portfolio assignment tasks:** 1. **Task**: Preparing formal feedback on an email for a client. 2. Self-reflection learning **log**.	2, 7, 39 3, 15
				Test: Three questions concerning Growth Mindset, personal values & modes of learning.	7, 29 29 & 29
				Competency: Shows self-awareness and during the coach-client relationship chooses how to react rather than reacting automatically, and displays and communicates values underpinning good coaching practice.	3, 5, 27

Module	Duration		Activities	Assessment	Outcomes Assessed
	Time	Week(s)			
Module 13: Advancing as a Coach	3 hrs	Week 17 (180 min)	M13-1 Limiting misunderstanding M13-2 Managing Conflict M13-3 Reluctant clients M13-4 Evaluating your coaching	**Portfolio assignment tasks:** 1. **Task**: Practice in using the three things method of evaluation, through evaluation of the course. 2. Self-reflection learning **log**.	37, 40, 41 3, 15
				Test: Two questions on The Coaching Journey & limiting beliefs.	27 28
				Competency: Able to anticipate conflict or disagreement with a client and then takes appropriate steps to manage it or limit any impact.	2, 4
				Competency: The coach regularly carries out evaluations of coaching sessions or meetings with clients.	38, 41
Module	**Duration**		**Activities**	**Assessment**	**Outcomes Assessed**
	Time	**Week(s)**			
Module 14: Develo-ping Your Coaching Practice	5 hr 40 min	Week 18 (180 min) Week 18 (160 min)	M14-1 Setting Up as a Coaching Business M14-2 Building Your Brand M14-3 Pricing M14-4 Marketing M14-5 Networking M14-6 Continuous Professional Development	**Portfolio assignment tasks:** 1. **Task**: Discussion of the advantages & disadvantages of setting up a coaching partnership, and a decision, if one has been reached. 2. Self-reflection learning **log**.	9, 11, 13 3, 15
				Test: Two questions on building your brand, and continuous professional development.	9, 15 & 30, 38
				Competency: The coach has policies for attracting business and for charging.	10
				Competency: The coach actively seeks development opportunities and seeks to stay current.	38

3. Course Learning Outcomes

1. Can promote and support client understanding by listening to understand, questioning effectively, communicating clearly and facilitating depth of understanding
2. Can establish trust and respect
3. Can describe various coaching styles and can determine individual coaching style
4. Partners with the client to determine client-coach compatibility
5. Can illustrate ways to maintain a flexible approach when coaching and can adapt coaching style to what works best for the client
6. Can articulate best practices to establish rapport with the client and describes and applies at least two best practices used to build and maintain rapport
7. Can use suitable language during coaching sessions that the client can relate to and assists the client to enter easily into a meaningful dialogue
8. Can explain the process of coaching, and the benefits of coaching both for the client and their context
9. Can communicate effectively his/her own values, beliefs, and attitudes that guide their coaching practice
10. Can guide the client to support the process of reaching an agreement for the coaching contract
11. Can agree appropriate levels of both confidentiality and communication to others with the client
12. Can manage the conclusion of the coaching conversation so that the client is clear about the outcome of the session & knows how to move forwards
13. Can articulate a realistic perception of his/her individual coaching strengths, limitations and CPD and training requirements
14. Can justify the importance of diversity and inclusion in his/her coaching practice
15.Can explain the different aspects involved in business coaching
16. Can articulate the significant trends, opportunities and issues in tourism

17. Can illustrate the benefits of using a blended coaching model such as the S4IG model
18. Can apply the situation-problem-solution framework to several coaching situations in the tourism and hospitality sectors
19. Can determine what business data needs to be captured and can use relevant data collecting techniques
20. Can analyse business data and present findings to the the client, sponsor, stakeholders (if required)
21. Can explain approaches to ask the client to clarify and review his/her desired outcomes and to set appropriate goals
22. Can articulate ways to ensure there is congruence between the client's goals and their specific context
23. Can coach the client to explore a range of options to achieve client's goals
24. Can coach the client to ensure the client chooses a solution or a way forwards
25. Can select appropriate ways to keep notes which track a client's progress and reviews progress with the client
26. Can assist clients to effectively plan their actions including appropriate support, resourcing and contingencies
27. Can work with the client to develop and identify actions that best suit the client's personal preferences
28. Can illustrate approaches to encourage the client to take ownership and responsibility for client's own decisions, actions and continuous development - Positively confront the client when he/she does not take agreed-upon actions
29. Can articulate ways to support the client to identify potential barriers to taking action
30. Can describe and apply at least one method of building a client's commitment to outcomes, goals, actions and business performance
31. Can illustrate ways to review the client's progress, achievement of outcomes and goals and revises as appropriate
32. Can explain the rationale for basing his/her selected coaching approach on a coaching framework or coaching model

33. Can articulate a coherent model of coaching based on one or more established coaching frameworks or models
34. Can justify the selection of relevant approaches, models, theories and tools which are applicable to the client's context
35. Can work with the client to develop goals that are specific, measurable, action-orientated and results-orientated and that have an appropriate time frame
36. Can describe several established tools and techniques to help the client work towards agreed outcomes
37. Can articulate approaches and techniques which monitors and reflects on the effectiveness of the whole coaching process
38. Can request feedback from the client on his/her coaching effectiveness and acts on feedback in a constructive way through self-reflective practice
39. Can describe ways to implement a formal feedback process and an informal feedback loop with the client
40. Can articulate ways to establish a rigorous evaluation process working in tandem with the client and stakeholders (if relevant)
41. Can use evaluative skills to evaluate/assess the coaching outcomes with client and stakeholders (if relevant)
42. Can explain the benefits to the client of using KPIs
43. Knows how to facilitate the development of strategies for leading and managing organizational change
44. Understands organizational processes and how to improve their efficiency and effectiveness
45. Knows how to facilitate the creation of vision and the clarification of direction
46. Can analyze the elements, principles and relationships in organizational structure, culture and change management

4. Assessment Procedure

Pre-Course Assessment

The Assessment Toolkit has two tools for use in pre-course assessment; a sheet of guidance notes and tools to use both for reviewing CVs and at an interview. These, if used, will have to be fitted to a course provider's existing policies and procedures for student recruitment.

Course Assessment

Theory Component

Attendance and Participation

These are to be set as per the policy of the training institution. As a guide, 85% is recommended as the required attendance to allow for successful completion of the course.

Test

The test is administered twice. The first time is before the course starts, and the scores do not count towards a participant's end of course assessment. It may be administered on paper during an induction session before the start of the course, or electronically, also before the start of the course.

The test is administered for a second time on the final day of the face-to-face course. This time the marks are counted towards the assessment.

The average improvement in scores from before the course to the final day of the face-to-face course is a measure of course effectiveness.

An answer key appears after the test in this toolkit.

Self-reflection Learning Log

This should be filled in by each participant after a face-to-face training session, printed, and added to the portfolio. Some modules are delivered in a single session, and some over two sessions. There should be a self-reflection learning log completed for every session.
The portfolio is submitted for assessment and feedback after modules 3, 6, 9, 12, 14.

Portfolio Assignment Tasks

Each participant is to complete a portfolio assignment task at the end of a module, whether the module is presented over one week or two. Sometimes there is a choice of two tasks, and each participant should choose one only. Once completed, the portfolio assignment task should be printed and included in the portfolio. The portfolio should be submitted after every third module (at the start of modules 4, 7, 10 & 13) and again at the start of module 15 (to review the work on modules 13 & 14).

Competencies

There are 30 competencies. 12 of these are separated into a list of 'core' competencies, and each participant is assessed against these (demonstrated or not) on the final simulation day. This means there will need to be additional trainers present, each monitoring the participants in a single group, for example, with a sheet of the core competencies per observed participant. Clearly the more assessors there are, the more attention each participant will receive.

100-hour Practical Component

Competency Checklist

The full list of competencies should be printed off and added to the portfolio. When a participant returns from a client visit, the participant should look through the competencies and add the date next to any competencies that s/he thinks s/he has now met. This is the starting point for the next piece - self reflection.

Self-reflection on Practice

The participant should also complete this after each client visit. The most important part is the first, when the participant discusses how s/he has demonstrated new competencies, or developed significantly in demonstrating others already demonstrated.

Practical Experience Log

This is a simple means to record that the requirement for 100 hours of practical experience is met. It is a pre-requirement for successful course completion, but itself does not count towards grading.

Portfolio Evidence

There are no predetermined evidence items. Each participant should choose five pieces of evidence to showcase their coaching practice and achievements in his/her portfolio. The work could be completed forms or reports, or letters, or other work conducted as part of a coaching relationship. The evidence should be accompanied by a 2000 word reflection of why the items demonstrate coaching growth and competence.

When the participant has logged 100 hours of practical coaching work, s/he should, along with:

- The evidence items,
- 2000 word reflective paper
- Completed portfolio (including)
    - Practical experience log
    - Self-reflection on practice
    - Competency checklist

Marking work

The test answer key is below the test. The test has a raw score out of 30.

Self-reflection learning logs, portfolio assignments, and the core competencies will be graded A, B, C, D, E or F as per the table below. There is room for + and - as well, so A+, A, A-, etc.

Grading

All grades are converted into their scores, and then all of a set are added up and divided by the number in that set, and entered in the table below under Raw Score (RS). For example, there are 14 portfolio assignments, so the scores are added together and divided by 14 to give a score out of 100 for portfolios.

	Area of Work	Raw Score (RS)	Weighting	Sum	Converted Score
During the course	Course attendance & participation		10%	RS/10	
	Test (out of 30)		20%	RS*3.3/5	
	Self-reflection learning logs		10%	RS/10	
	Portfolio assignments		25%	RS/4	
	Core competencies		10%	RS/10	
During the practical experience	Record of practical experience		25%	RS/4	
				Total	

	A	B	C	D	E	F
Self-reflection	Strong evidence subject grasp and self-reflection	Good evidence of subject grasp and self-reflection	Adequate evidence of subject grasp and some self-reflection	Poor evidence of subject grasp or self-reflection	Minimal subject grasp or self-reflection	Not attempted
Portfolio Assignment Tasks	Excellent work fully addressing task, more than satisfying	Strong work addressing task, mostly satisfying	Sound work mainly addressing task in satisfactory way	Significant gaps addressing task, or not fully addressing due to brevity	Too short, or in other way failing to address task more than minimally	Not attempted
Core Competencies	11 or 12 competencies observed	9 or 10 competencies observed	6, 7 or 8 competencies observed	4 or 5 competencies observed	1, 2 or 3 competencies observed	Not present
Practical Work	Strong evidence of application and development	Good indication of application and development	Adequate evidence of both application and development	Poor evidence of application and/ or development	Minimal evidence of application and/ or development	Not submitted
	100 / **95** / 90	85 / **80** / 75	70 / **65** / 60	55 / **50** / 45	40 / **35** / 30	**0**

Note that in scoring, an A grade is counted as 95. Especially strong work may be awarded an A+, i.e. 100. A borderline but still A (strong more than good) case may get an A-, i.e. 90. A borderline case but still B (good more than strong) would, however, get B=. i.e. 85

5. Application Process

1. Applicants for the Professional Business Coaching Course should submit an up to date CV and a brief statement (max 600 words) answering the questions:

   (1) Why do you wish to join the course?

   (2) Why do you consider yourself to be a suitable candidate? (in terms of previous experience), and

   (3) What do you hope to achieve after the course?

2. The training provider will use the Participant Selection Form to decide, from the paper submissions, those candidates that qualify for interview. The second level criteria is useful for selecting candidates to invite to interview (in person or video link).

3. The training provider will then interview candidates. Suggested questions and assessment criteria are provided on the Selection Criteria Form.

4. Based on the paper evaluation and the interview responses, the training provider will offer places on the course to those it finds most suitable.

5. The criteria for application and entry into the course can be adapted to suit the course providers requirements.

6. Participant Selection Form

Candidate Name:	

From CV

Base level questions:

If the answer is no to any of these 3 questions, the candidate is rejected.

		Yes	No
1	Is the candidate educated to A/L level standard, holding a minimum of 3 A/L- levels at simple pass or higher?		
2	Does the candidate have any experience at all of a supervisory and/or guiding role within any sector?		
3	Has the candidate answered the application questions?		

Second level questions:

If the answer to all the base level questions is yes, the candidate's application will be considered in more depth, and be considered for interview.

		Yes	No
1	Is the candidate educated to post-A level standard, and holding a diploma or degree?		
2	Does the candidate have significant experience of a supervisory and/or guiding role within any sector?		
3	Does the candidate's written submission answer the three questions convincingly?		

If the answer to all the second level questions is yes, the candidate should be placed on the list for an interview. Each no answer pushes the candidate further down the priority list.

From Interview

Although any training provider will have its own policies for candidate selection, including interview, the following are some suggested questions that can be asked at interview, and what the interviewers can look for in a strong candidate's answers:

	Questions	Strong answers	Score 1-10
1	Why do you want to become a business coach?	Examples: Sharing knowledge & experience for good of community/country. To change focus of career to remain fresh. To have more flexibility through freelancing.	
2	What do you see as the factors holding back the development of MSME's?	Answers to do with lack of opportunity/ lack of training in the sector, rather than answers blaming people, e.g. for being stupid.	
3	What skills or areas of knowledge do you think are most urgently needed in the sector?	Answers that aren't too generalised, but are to do with identifiable gaps, e.g. in ability to analyse data and spot/act on trends, or ability to research and understand customer needs.	
4	How do you conceive the relationship between a coach and a client?	Answers should be focussed on collaboration rather than instruction. That the coach can learn from the client, too. Coach as guide.	
5	Tell us about a time you have had to deal with resistance to change. How did you help others accept change?	Real life experience about helping people share the vision that led to the change, to see its benefits, to stop denying it and start to accept and then embrace it.	

Compare your scores for these and other questions with your colleagues before deciding who to offer places to.

7. Course Test

Questions

1. "A coach can help a client to associate with others in the same industry, so that they are better able to represent their interests at the local and national levels."
   What is the coach helping the client to do here?

A. Build self-confidence.
B. Nurture staff
C. Delegate.
D. Network.

2. What should a business coach not do for a client?

A. Make decisions for the client so that problems and challenges are avoided.
B. Work alongside the client to help them define a vision for the client's business.
C. Identify goals and implement strategies that will help the client achieve objectives.
D. Help the client to navigate problems and challenges in the most effective way possible.

3. What does reframing mean?

A. We focus on a better future rather than failures and mistakes of the past
B. We see challenges, failures and mistakes as opportunities to learn.
C. We do not allow ourselves to get upset at every challenge, failure or mistake.
D. We can bounce back from disappointment, failure etc

4. Of the following coaches' roles, three are Outside-In. Which one is Inside-Out?

A. Showing the client how to do something technical
B. Giving honest feedback
C. Helping the client get insight
D. Sharing your experience

5. If a goal or objective is SMART it is:
A. Specific, Mathematical, Accurate, Realistic, Tidy
B. Smart, Mature, Accurate, Realistic, Tidy
C. Specific, Measurable, Achievable, Realistic, Timebound
D. Smart, Measurable, Accurate, Realistic, Timebound

6. 'Average spend per visitor' is an example of:

A. Wishful thinking
B. Key Performance Indicators
C. The state of the economy
D. Financial planning

7. The two internal factors in a SWOT analysis are:

A. Strengths and weaknesses
B. Opportunities and Threats
C. Strengths and Opportunities
D. Weaknesses and threats

8. TGROW is an example of:

A. Measurements of financial performance
B. Organisational structure
C. Coaching Models
D. Tourism industry associations

9. What is the order of steps an employee typically goes through when faced with change, according to the Scott & Jaffe Model?

A. Resist - Deny - Commit - Explore
B. Explore - Resist - Deny - Commit
C. Commit - Explore - Deny - Resist
D. Deny - Resist - Explore - Commit

10. The picture, shared with all staff, of where a business is heading in the future, what it wants to achieve, and how is called:

A. Mission
B. Vision
C. Session
D. Target

11. Which is bad advice for communication?

A. While listening, focus your attention fully on what the person is saying.
B. If the client doesn't understand what has been said, try not to be critical. Try to be supportive and find a way to explain the concept in an easier way
C. If the person you are talking or listening to doesn't make eye contact with you, you should still try and look at him or her to draw them in.
D. When you are stuck listening to a boring speaker, then it's best to switch topics quickly.

12. What should a coach do if a coach and a client consistently fail to develop rapport?

A. Ignore the situation. It's best not to think about it too much.
B. Be open and blame the client and give them a list of things they need to do in terms of behaviour.
C. Try to change your ways and try to do what the client wants you to do. Things will work eventually.
D. If this situation is continuing then, it is better to acknowledge this earlier on, so that you can help switch the client to another coach.

13. Which of these steps should not take place on the first day of coaching the client?

A. Ask the client what they want to achieve from the coaching.
B. Use KPIs (Key Performance Indicators) to evaluate their business performance
C. Appear warm, personable, approachable. Think of body language, eye contact.
D. Find out about the client: name, family and general background and some other general questions to make them feel at ease.

14. Which is not a description of empathy?

A. creates connection between people
B. requires putting yourself in another person's shoes
C. Looks on the bright side in a bad situation, to make it sound less bad
D. is the ability to share and understand the feelings of another person

15. A fishbone analysis is used….

A. to collect problems together and prioritise them
B. to identify the root causes of a problem
C. to compare different solutions to a problem
D. for all of the above

16. You can design KPIs for the following areas of business:

A. Product, Marketing, Systems and other areas
B. Product, Marketing, Systems only
C. Product and Marketing only
D. Product and Systems only

17. Which of these statements is something a person with a Growth Mindset would not say?

A. "That went badly. What can I learn from the experience?"
B. "Failure is not growing and staying the same."
C. "I do badly, however much effort I put into it."
D. "If I can put in more effort, I can succeed."

18. An employee is extremely demotivated because she is always micromanaged by her boss. Which of the following values is probably important to her?

A. Collaboration
B. Honesty
C. Loyalty
D. Independence

19. Which of these modes of learning is best for developing critical thinking and problem-solving skills and for learning how to do something creative?

A. Experiential
B. Demonstration
C. Explicit
D. Guided

20. What percentage of people in Sri Lanka are considered persons with disability?

A. 8.7%
B. 4.2%
C. 11.3%
D. 6.0%

21. Who makes the decision when the consultative method is used?

A. Everyone agrees on the decision
B. The leader
C. The majority
D. The leader and the majority

22. There are Intrinsic and Extrinsic motivators. Look at the motivators listed below. Three belong to one category, and only one to the other. Which is the odd one out?

A. Good interpersonal relations at work.
B. Promotion.
C. Praise.
D. Job security.

23. At first, which of these approaches and techniques would you not use in feedback with an inexperienced client who finds it hard to find solutions for their problems?

A. Using explanations.
B. Using demonstrations.
C. The guided approach.
D. The collaborative approach.

24. Which of these things would you say is a 'don't' rather than a 'do' of giving feedback?

A. Give the client clear judgements on their performance.
B. Give feedback soon after the event.
C. Give feedback in a private session.
D. Give feedback while being calm, polite and professional.

25. Which of these questions would you not ask early on in a feedback session?

A. What went well?
B. What changes would you like to make next time?
C. May I tell you what I liked?
D. What did you notice about your performance?

26. Which is the current model of disability advocated by the United Nations?

A. Medical model
B. Human rights model
C. Social model
D. Blended model

27. Which of the following is not a step on the Coaching Journey?

A. Set the tone
B. Set SMART options
C. Lay the foundation
D. Decide on goals

28. Which is not an example of a limiting belief?

A. “I’m not educated enough to be a speaker”
B. “I could never run my own business”
C. “I could succeed at social media marketing if I studied it”
D. “I’m not good at marketing”

29. Which of these is not one of the seven steps of building your brand?

A. Get organised
B. Identify who your ideal coaching client is
C. Advertise regularly
D. Start pitching

30. On the CPD cycle, what follows Identify?

A. Plan
B. Learning activities
C. Reflect
D. Apply

Test Answers

1	D		11	A		21	B
2	A		12	D		22	C
3	B		13	B		23	D
4	C		14	C		24	A
5	C		15	B		25	B
6	B		16	A		26	B
7	A		17	C		27	B
8	C		18	D		28	C
9	D		19	A		29	C
10	B		20	A		30	A

8. Self-Reflection Learning Log for Inclusion in Portfolio

Name:		Module number:	

Please download and type your responses into the boxes (which will expand as you type). Then print off and include in your portfolio. Do not forget to include your name and the module number (above). You should write c. 125-200 words in each sections 1, 2 & 3. Section 4 is for you to use as you like, and record any things you want to remember/thoughts you have had.

1. What were your main learning points from this module? (You may use bullet points, but do not just bullet point a list of learning points. Explain briefly what you have learnt about each one).

2. What was covered in the module that you need to find out more about? When and where will you improve your knowledge and skills concerning this? If you feel less sure about it, is it something that you can use in your coaching, or not yet?

3. What from the module are you most excited about, and looking forward to putting into practice? How will you set about this?

4. Anything else?

9. Portfolio (Assignment Tasks)

Module 1 - What is Business Coaching: Portfolio Task

In Activity 6b ('The Benefits of Coaching') you were given nine reasons why a client should take on a business coach, as follows:

- To learn how to think in new ways.
- To build self-confidence.
- To nurture staff.
- To assess which risks to take.
- To receive additional support.
- To devise an action plan for the future.
- To get honest opinions.
- To be able to network
- To know when to delegate.

In a Sri Lankan business context, which three of these do you think are most important for clients?

Write a paragraph (c. 175-250 words) for each of your choices, saying why this is important in a Sri Lankan context. Please support and justify your choice with factual information and examples.

Choice 1:

Choice 2:

Choice 3:

Module 2 - The Basics of Coaching: Portfolio Task, Option 1

(Please choose between option 1 and option 2, and complete only one of them)

Record seven Ethical Principles which you think are important, and commit to following during your coaching career. You can refer to those of the International Association of Coaching, but there is to be no cutting and pasting. For each one, what does it mean to you, and why do you consider it important? (Write c.100 words for each)

1	
2	
3	
4	
5	
6	
7	

Module 2 - The Basics of Coaching: Portfolio Task, Option 2

(Please choose between option 1 and option 2, and complete only one of them)

Choose any **three** of the following personal qualities and for each write a paragraph (c. 250 words each) describing an incident where you have demonstrated that quality in a work-related context. When and where was this? What was the situation? How did you demonstrate the quality and what impact did this have?

Creative	*Persuasive*	*Empathetic*
Tolerant	*Resilient*	*Insightful*
Supportive	*Flexible*	*Tactful*

1. ____________________

2. ____________________

3. ____________________

Module 3 - The Coaching Model: Portfolio Task

Think of a business you are familiar with, one where you are and on friendly terms with the owner. It could be a cafe, or shop, or a guesthouse or hotel, for example, in your district, and not far from your home. You will be doing three or four tasks working with this owner, so make sure that he or she is aware of this, and gives his/her permission. (Hopefully your friend will get some good ideas for the business, so the benefit will not just be for you).

When you have permission, prepare for a session with the owner, as follows

1.make questions to ask to explore the topic (which will depend on the nature of the business)
2. make questions to ask about the current reality of the business
3. make questions to ask to build a SWOT analysis of the business

Present the questions, a report on what was learnt, and a SWOT analysis. The report should be c.750 - 1,000 words in total.

1. Questions about topic

2. Questions about current reality

3. Questions for SWOT analysis

4. Report on topic and current reality

5. SWOT analysis	
Strengths: •	Weaknesses: •
Opportunities: •	Threats: •

Module 4 - Managing Change: Portfolio Task, Option 1

Visit the same business you visited after Module 3. Before you visit, write a paragraph on where you think the business lies in the business life cycle. Then, during your visit, discuss this with the owner/manager. Write a second paragraph explaining how closely your views align, where your views differ, and why you think the owner is mistaken if s/he does not agree with you. (Please write c. 750 - 1,000 words over the two parts.)

1. Pre-visit, where you think the business lies in the business life cycle (with reasons)

2. Post-visit, how closely the owner/manager's views align to yours, where they differ, and your cur rent view.

Module 4 - Managing Change: Portfolio Task, Option 2

Consider a time in your working life when an organisation in which you worked instituted change, which was unpopular and resisted by staff, at least initially. Knowing what you now know, how would you now advise the management of that time how to better prepare to overcome this resistance. You may change any names and details to maintain confidentiality. (Please write c. 750-1,000 words.)

Module 5 - Diversity and Inclusion: Portfolio Task

For this task you need to try and, for a brief time, live the experience of a person living with disability. First, think of, and write down, two places you frequently visit. They need to be different types of places. So, one could be a supermarket, and then the other could be a government office, or a park you go to, or a gym, or a cinema.

Now you have thought of your places, you need to visit them, but to do so as a person living with disability. Do do this, you could:

- Borrow a wheelchair, and use it.
- Borrow a pair of crutches, and use them (maybe tying your legs together at the ankle, to make you actually need the crutches.
- Paint a stick white and use a blindfold.
- Have your arms tied behind your back, as if you had lost them both.
- Some other form of artificial disability which you can live for an hour or so.

Now, visit your two places. Maybe try going by bus? Make notes as you go and write up your experience here afterwards. You should write c.750-1,000 words in total.

1. What did you experience in your visits, and how did this make you feel?

2. What do you think are the implications for public spaces? What should happen?

3. And what do you think it would be like for workers who have disabilities in these places? Or are these places narrowing the pool of people they can recruit from, and effectively excluding workers with disability?

Module 6 - Communication Skills: Portfolio Task

There are 2 parts to this task. You should respond with c. 350 - 450 words to each part.

Part A:

You are asked to observe and notice how the people they interact with listen. This is a noticing task, in which you must use your understanding of good and bad listening skills (as discussed in the training room) and then apply them to real life.

In your everyday interactions be more mindful when you are interacting with people. Are they good listeners or are they bad listeners? If they are bad or good listeners, please note down and describe:

1. What behaviours make them bad / good listeners?
2. How do you feel when talking to them?
3. How long did you talk to them for? Was this influenced by their listening skills?

Part B:

In Activity 8c, you were asked to practice paraphrasing, echoing, and checking for understanding. Now, use these active listening skills in real life listening. Then record here in what way you used these techniques and whether you felt it supported clear understanding of the message. Did it help or hinder the listener?

Module 7 - Building Successful Relationships: Portfolio Task, Option 1

Find 3 people to talk to and use the strategies you highlighted in Activity 2b.

Report their observations on these three conversations, taking these questions as a guide, and writing c. 250-300 words per report:

- Did you feel that you were able to engage with your conversation partner?
- Did you use the strategies we raised in Activity 2b?
- Did you feel that your conversation partner was actively engaged in the conversation or was it a one sided conversation?
- Did you speak too much or too little?
- Did you enjoy this interaction?

Conversation 1:

Conversation 2:

Conversation 3:

Module 7 - Building Successful Relationships: Portfolio Task, Option 2

For this task, you are asked to think and write about two people who you know, preferably in a work situation, and write about them. Please change names and avoid any information that could lead to a person's identity being discovered. Write c. 350-400 words for each part.

Part A:

Who do you know that you feel they can trust? What qualities do they exhibit to give you this feeling?

Part B:

Who do you know that does not project the characteristics of trust? What 'qualities' or characteristics do they exhibit to give you this feeling?

Module 8 - Key Performance Indicators: Portfolio Task

Choose two OPIs from any set or sets (hospitality/water sports/tours/etc) from https://bit.ly/S4IG-kpis and for each describe a scenario in which you may want to adapt their ranking criteria (0-6) to better suit a client's needs and situation. The first question does not count towards the workcount. Please write c. 750-1,000 words spread between questions 2-4.

1. Which are the OPIs you are going to work with, and what are their current ranking criteria?

1st OPI	
2nd OPI	

2. Describe the scenario in which you would wish to adapt the ranking criteria.

1st OPI	
2nd OPI	

3. Exactly how would you change the ranking criteria?.

1st OPI	
2nd OPI	

4. What benefit would you hope to achieve from this change?

1st OPI	
2nd OPI	

Module 9 - Business Coaching in Practice: Portfolio Task

In Module 9 you were introduced to five forms, which are listed here. For each:

1. What is the purpose of this form, and what benefits do you think it will bring?
2. What problems do you think you could face using it, and how could you overcome them?
3. Would you like to adapt/change the form in any way? How, why and to what effect?

Please write a total of c. 750-1,000 words, being roughly 150-200 words on each form.

1. Basic Information Form
2. Baseline Profile Form
3. Action and Skills Development Form
4. KPI Tracking Form
5. Coaching Activity Report

Module 10 - Giving Feedback: Portfolio Task

Below is an email from your client, Rashmi, who is a hotel manager in Trincomalee. You have talked about guest relations, and dealing with complaints, and Rashmi has given you this email to look at, with a view to receiving feedback. Prepare formal feedback on this, using the feedback template below the letter. You should write c. 750-1,000 words on this task.

From: Theturquoisehotelgroup@gmail.com
To: drclaragreenfeld@hotmail.com
CC: sonalik1972@gmail.com
Subject: Your message on 3 May 2021

Good day to you, Dr Greenfeld:

Thank you for your message that I received yesterday. I appreciate the sweet things you said about our hotel and I am happy that you enjoyed most of the weekend you spent with us in Trincomalee. I am especially pleased that you appreciated the cleanliness of the hotel, as this is something my wife Sonali works very hard to maintain. She will be delighted to know this! However, I regret to hear that you felt your stay was spoilt by the noise you heard from the hotel next door on Saturday night. As the night porter told you when you complained on Saturday night, and as my deputy manager explained the next day, the hotel next door has a special music licence that allows it to hold a late-night discotheque every Saturday. I have complained to the other hotel about this several times, but there is nothing I can do to change the situation. One reason is because the owner of that hotel has a lot of powerful connections in Trincomalee. So he can do what he likes.

You said in your message yesterday that our hotel was at fault because we did not warn you about the Saturday discotheque before you booked and paid online for your room. Well, I must disagree about this. Our policy is to tell all Saturday guests about the discotheque during the booking procedure. In your case, one of our receptionists most definitely gave this information when you spoke to her by telephone to confirm your booking. I am sorry if you do not remember this, but the receptionist certainly mentioned it because this is what we always do. I agree with you, however, that we could also put this warning in writing and send it to potential Saturday guests by email. So we will do this in future.

You have asked us to refund you the charge of your hotel room for one day and night to compensate for what happened on Saturday. I cannot agree to this because you also enjoyed many of our hotel services on Saturday, including breakfast, the gymnasium and the swimming pool. But instead I am willing to offer you and / or your family members a generous discount if you choose to stay in our hotel again, the next time you are in Trincomalee, during weekdays. If this offer is of interest to you, please let me know in advance of your next planned visit and I will do the needful.

Thank you for your patience and my apologies again for the unfortunate situation on Saturday.

Yours sincerely,
Your obedient servant,
Rashmi Khanna
Manager
The Turquoise Hotel
Trincomalee

Now prepare your feedback in the following six areas (you should write c. 750-1,000 words in total):

1. Three strengths of the work / performance to highlight to the client

2. Three aspects of it that could have been better to highlight to the client.

3. Three questions to ask the client early on the feedback, to make them evaluate their own performance.

4. Three questions to ask the client later in the feedback, to make them think about how they can change and improve.

5. One thing you might explain to the client – possibly writing down the explanation you would give as clearly and simply as possible?

6. One thing you might demonstrate to the client – possibly giving some directions about how you would demonstrate it?

Module 11 - Business Leadership Skills: Portfolio Task

There are two tasks to complete. Each should be c. 350 - 450 words long.

Part A

Write about two decisions you have made in the past, related to your professional or personal life. In each you should have used a different one of the four decision-making methods: Autocratic - Consultative – Consensus – Democratic. What decision had to be made, and how did you employ the method you did? What was the result? (If you can't think of any real life examples, you can make something up.)

Part B

Describe a situation in which you acted as a Resolute Leader. What were the ideas, plans or proposals that you were standing up for? Who provided opposition, and why? How did you display Resolute Leadership, and what was the result?

Module 12 - Growth Mindset: Portfolio Task

You will be talking to your client, Sanath. Below you have extracts of what he said in your previous meeting, which was only your second meeting, in fact. He really opened up and talked a lot. At the time, you thanked him for being so open, and said you'd like to think a bit about what he said before responding. So, read what Sanath said, and then in the boxes below, prepare what you would like to say.

Extracts Of An Interview With Sanath, Owner Of A Tour Company

"…I'll be honest with you, I'm not a fan of teachers, tutors, coaches and so on. I think that's probably because of my experiences at school. I wasn't what you'd call an academic pupil. Far from it! I was very slow in learning to read and write and my grades were terrible across the board. Not that the teachers did anything to help or encourage me. To them I was simply an idiot, not worth bothering about. It wasn't until years later that a friend of my wife, who's a teacher, did a workshop on special needs children at the British Council. She suggested to my wife that maybe I'd had dyslexia. That would explain the problems I had as a kid forming letters and putting them in the right order and focusing on words written on a page. Of course, back then, teachers didn't know what dyslexia was. But I suppose there's no point complaining about it now. You can't change what's in the past…"

"…I consider myself a self-educated person. I didn't learn anything until after leaving school. I'd started working as a driver for a local tour company, taking tourists around temples and ruins and other ancient sites, and they were always asking me questions about them, and I was embarrassed that I didn't know anything. Especially when they were foreigners, with me a Sri Lankan! So I began learning about them – by talking to monks and guides as much as by reading books and looking online. As I said, I don't find reading easy. I think I'm quite an expert on Sri Lankan history now, even if I acquired my knowledge without the aid of any teachers. When I look back on our history, on what we achieved thousands of years ago, it makes me feel proud of this country – well, apart from its education system…!"

"…As well as history, I've taught myself languages – English, German, a bit of Chinese and Russian. Well, I've taught myself how to speak them because, surprise, surprise, I'm not much good at writing them. They were mainly learned through my interactions with foreign tourists. I was never shy. I just kept on trying to communicate with them and, gradually, I got better. It's funny, because in other ways I'm quite embarrassed about making mistakes. Maybe it's because of my school experiences. Whenever I made a mistake – and because I was such a hopeless pupil, I made a lot of mistakes – I'd be teased by the other kids and I hated that. Thinking about it now, maybe I don't like looking like a fool in front of other Sri Lankans. But with foreigners, no matter how bad my English or German or whatever was at first, I didn't care because they **weren't** Sri Lankans…"

"…I've never enjoyed working for other people, as I did when I was employed by other tour companies, first as a driver and then as a guide. That's why having my own company now, even though we've had problems and times are hard at the moment, still feels like a dream come true. I'm not at anyone else's beck and call! My wife jokes about me being a dreadful micro-manager, though. She asks me why if I like being independent so much, I don't allow the people working for me any independence while they do their jobs. Well, maybe she's only **half**-joking…"

"…Problems? After the Easter Sunday bombings and then this wretched pandemic, obviously I need to find new ways of attracting customers. I suppose this means doing more marketing on the Internet and social media, but I can't summon much enthusiasm for that stuff. Needless to say, computers and IT weren't something I got much training in at school and I was content to muddle by using things like personal contacts, word of mouth, knowing which hotels to target and sheer bloody persistence. It worked in the good times, when all the foreign tourists were here, but obviously not now. One of my daughters is quite a techie and she's offered to help me get set up on Instagram and the like, and maybe put together a website, but to be honest I can't see myself spending time in front of a computer. Doing that would kill the joy of the job for me. Plus it would involve a lot of writing – well, typing – and that probably scares me as well…"

"…Staffing is an issue too. You'd think that in tough times like these people would want to stay in their jobs, but I still have a high turnover. It pains me, in fact, because I put a lot of effort into training these guys so that they stand out from the crowd. They're not just drivers and guides – they're drivers and guides whom the tourists trust and feel safe with, whom they know aren't going to fleece them, whom they see as being knowledgeable, and whom they'll recommend to other tourists and to the hotel owners. I give these guys polish, in other words. But this is how they reward me – off they go at the first opportunity. No loyalty at all! Ideas above their station, I reckon. After a few months of working for me, they convince themselves that they can set up business on their own…"

Now prepare your feedback in the following four areas (you should write c. 750-1,000 words in total):

1. Evidence of a Fixed Mindset or Growth Mindset in the client, and suggested strategies for moving Sanath from the former to the latter.

2. The suggested level of self-awareness in the client and possible strategies for raising it.

3. How aligned Sanath's working situation seems to be with his and possible strategies for making them more aligned.

4. Modes of learning that a coach could use to help this client improve his situation and why the coach would choose them.

Module 13 - Advancing as a Coach: Portfolio Task

Evaluate the Professional Business Coaching Course using the three things method. Three things that went well in the training and three things that could be done differently on future courses. Write c. 350-450 for each box.

Three things that went well in the training:

Three things that could be done differently on future courses:

Module 14 - Developing your Coaching Practice: Portfolio Task

Do you think it is a good idea to go into partnership with another coach when setting up your business? Give the advantages and disadvantages for yourself of going into a partnership and explain your final decision – yes, no, or not yet sure. Write c. 750-1,000 words in total.

Advantages
Disadvantages
Decision (or inclination)

10. Competencies

Part One: Core Competencies used in End of Course Simulation:

1. Generally displays the qualities of a successful business coach; being a good 'people person'; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.
2. Asks the clients useful and enlightening questions which help them find their own solutions / make their own decisions.
3. Uses a suitable variety of question types to understand the business situation.
4. Is able to assist a client make goals/objectives that are genuinely SMART.
5. Is aware of potential resistance to change from various stakeholders and assists the client in considering this factor.
6. Is able to use active listening skills to ensure effective communications.
7. Is able to work collaboratively with the client and gently steer meetings to agreement.
8. Helps a client understand the importance of KPIs to measuring performance.
9. Can use raw data to design a KPI and measure performance against it.
10. Steers the client towards identifying goals, setting objectives and designing KPIs, and does not dictate these to the client.
11. While giving feedback, exhibits qualities that are conducive to the giving of effective feedback, such as asking appropriate questions at appropriate times.
12. Shows self-awareness and during the coach-client relationship chooses how to react rather than reacting automatically, and displays and communicates values underpinning good coaching practice.

Part Two: Full Competency Set for Self-reflection/Self-evaluation

1. Understands the roles of a business coach and applies those roles appropriately in their relationship with the client, with a focus on coach rather than trainer or counsellor.
2. Generally displays the qualities of a successful business coach; being a good 'people person'; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.
3. Reflects on their experiences as a business coach and draws appropriate conclusions from those reflections. Implements lessons learned.
4. Asks the clients useful and enlightening questions which help them find their own solutions / make their own decisions.
5. Manages time efficiently, both time with client and time preparing/following up.
6. Uses a suitable variety of question types to understand the business situation.
7. Is able to assist a client make goals/objectives that are genuinely SMART.
8. Endeavours to collect data and opinions on a business from a variety of sources, not merely the client.
9. Refers to a client's vision to maintain a focus on advancing the business and/or maintain morale and motivation.
10. Is aware of potential resistance to change from various stakeholders and assists the client in considering this factor.
11. Is able to use active listening skills to ensure effective communications.
12. Shows awareness of how to create a connection with people and is able to build rapport with the client.
13. Is aware of the qualities and behaviour needed to nurture trust in a relationship and is able to build that with the client
14. Is able to understand the differing roles of the client and coach and is able to convey this clearly on the first day meeting.
15. Is able to work collaboratively with the client and gently steer meetings to agreement.

16. Is able to respond with empathy to the client if the need arises.
17. Helps a client understand the importance of KPIs to measuring performance.
18. Works with a client to select, adapt or design KPIs.
19. Can use raw data to design a KPI and measure performance against it.
20. Keeps clear records to track and inform progress of coaching.
21. Steers the client towards identifying goals, setting objectives and designing KPIs, and does not dictate these to the client.
22. Tailors feedback appropriately according to different clients, client needs and business situations.
23. While giving feedback, exhibits qualities that are conducive to the giving of effective feedback, such as asking appropriate questions at appropriate times.
24. Assists the client to understand the meaning and significance of being resolute, and act in such a manner at appropriate times.
25. Shows self-awareness and during the coach-client relationship chooses how to react rather than reacting automatically, and displays and communicates values underpinning good coaching practice.
26. During the coach-client relationship, behaves in a way that encourages the client to develop and exercise a Growth Mindset.
27. Able to anticipate conflict or disagreement with a client and then take appropriate steps to manage it or limit any impact.
28. The coach regularly carries out evaluations of coaching sessions or meetings with clients.
29. The coach has policies for attracting business and for charging.
30. The coach actively seeks development opportunities and seeks to stay current.

Trainer / Assessor Resources

11. Simulation Day Core Competency Checklist

Participant's Name ____

	Competencies	√
1	Generally displays the qualities of a successful business coach; being a good 'people person'; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.	
2	Asks the clients useful and enlightening questions which help them find their own solutions / make their own decisions.	
3	Uses a suitable variety of question types to understand the business situation.	
4	Is able to assist a client make goals/objectives that are genuinely SMART.	
5	Is aware of potential resistance to change from various stakeholders and assists client in considering this factor.	
6	Is able to use active listening skills to ensure effective communications.	
7	Is able to work collaboratively with the client and gently steer meetings to agreement.	
8	Helps a client understand the importance of KPIs to measuring performance.	
9	Can use raw data to design a KPI and measure performance against it.	
10	Steers client towards identifying goals, setting objectives and designing KPIs, and does not dictate these to client.	
11	While giving feedback, exhibits qualities that are conducive to the giving of effective feedback, such as asking appropriate questions at appropriate times.	
12	Shows self-awareness and during the coach-client relationship chooses how to react rather than reacting automatically, and displays and communicates values underpinning good coaching practice.	

Observer's Signature: ____

Participant Resources

12. Practical Experience Log

Name ____

Date	Client	What was covered	Hours Min

Date	Client	What was covered	Hours Min
		Total time:	

13. Competency Checklist for Practical Component

As you meet competencies, you should record the date you do so for the first time. You should also use the competencies as the starting point for self-reflection.

Competency		Date
1	I understand the roles of a business coach and apply those roles appropriately in the relationship with the client, with a focus on acting as a coach rather than trainer or counsellor.	
2	I generally display the qualities of a successful business coach; being a good ‘people person’; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.	
3	I reflect on my experiences as a business coach and draw appropriate conclusions from those reflections. I Implement lessons learned.	
4	I ask the client useful and enlightening questions which help them find their own solutions / make their own decisions.	
5	I manage time efficiently, both time with the client and time preparing/ following up.	
6	I use a suitable variety of question types to understand the business situation.	
7	I am able to assist a client make goals/objectives that are genuinely SMART.	
8	I endeavour to collect data and opinions on a business from a variety of sources, not merely the client.	
9	I refer to a client’s vision to maintain a focus on advancing the business and/or maintain morale and motivation.	
10	I am aware of potential resistance to change from various stakeholders and assist the client in considering this factor.	
11	I am able to use active listening skills to ensure effective communications.	
12	I show awareness of how to create a connection with people and am able to build rapport with the client.	
13	I am aware of the qualities and behaviour needed to nurture trust in a relationship and am able to build that with the client.	
14	I am able to understand the differing roles of the client and coach and am able to convey this clearly on the first day meeting.	

Competency		Date
15	I am able to work collaboratively with the client and gently steer meetings to agreement.	
16	I am able to respond with empathy to the client if the need arises.	
17	I help the client understand the importance of KPIs to measuring performance.	
18	I work with the client to select, adapt or design KPIs.	
19	I can use raw data to design a KPI and measure performance against it.	
20	I keep clear records to track and inform progress during coaching.	
21	I steer the client towards identifying goals, setting objectives and designing KPIs, and do not dictate these to the client.	
22	I tailor feedback appropriately according to different clients, client needs and business situations.	
23	I give effective feedback and ask appropriate questions at appropriate times.	
24	I assist the client to understand the meaning and significance of being resolute, and act in such a manner at appropriate times.	
25	I show self-awareness. During the coach-client relationship I choose how to react (rather than reacting automatically). I display and communicate values underpinning good coaching practice.	
26	During the coach-client relationship, I behave in a way that encourages the client to develop and practice a Growth Mindset.	
27	I am able to anticipate conflict or disagreement with a client and then take appropriate steps to manage it or limit any impact.	
28	I regularly carry out evaluations of coaching sessions or meetings with clients.	
29	I have policies for attracting business and for charging.	
30	I actively seek development opportunities and seek to stay current.	

14. Self-reflection on Practice for Inclusion in Portfolio

Name:		**Date**	

After a client visit, please look through the competency checklist and mark off any competencies you feel you have met. Then please download the self-reflection and type your responses into the boxes (which will expand as you type). Then print off and include in your portfolio. Do not forget to include your name and the date (above). There is no advice on word limits.

1. Are there any competencies you have met for the first time, or competencies previously met that have been further developed? Write about one, two or three that stood out.

2. What was covered in the client visit that you need to find out more about? When and where will you improve your knowledge and skills concerning this? How will you respond in this area on your next visit?

3. What from the client visit most excited you?

4. Anything else?
