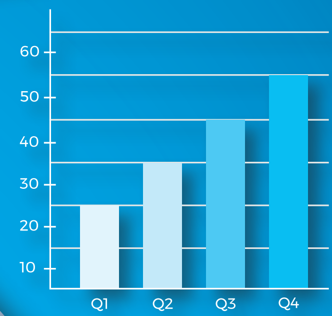
Sri Lankan Hospitality and Tourism

Professional Business Coaching Course



COACH HANDBOOK

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 Globa

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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

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.

About This Coach Handbook

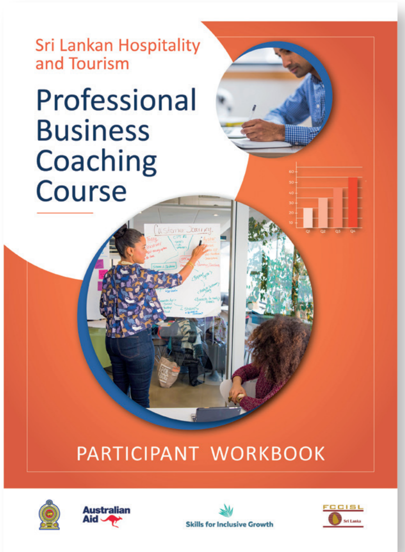
This Coach Handbook is a reference book on how to become a business coach. You can read it alongside the other course materials, and also refer back to it as you gain practical coaching experience. It includes information on all of the topics you will be learning about in the course.

There are 13 Sections that when studied together will provide you, the participant, with foundational business coaching skills and awareness of applying those in an MSME business context.

This handbook has been prepared to support the other materials in the Professional Business Coaching Course. It is accompanied by the following learning resources:

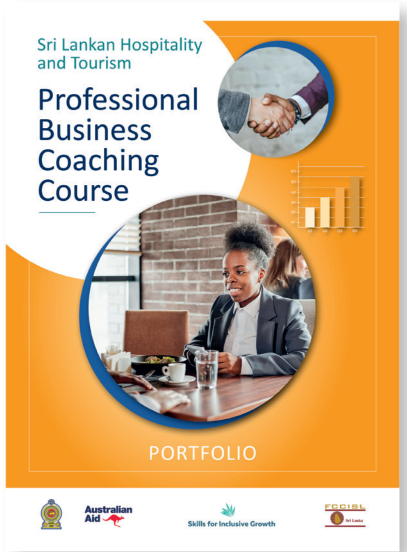
- **Participant Workbook** - The workbook that you use to follow the course materials and make notes as the course progresses.
- **Portfolio** - For recording assignments and practical coaching experience.
- **Coach Toolkit -** A collection of ready-to-use business and coaching tools to help you in the structured delivery of business coaching.

Course Documents



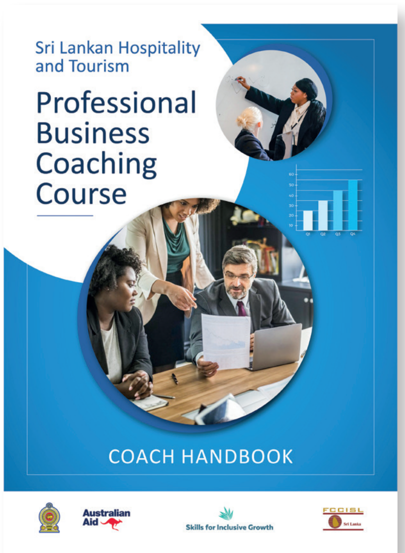
Participant Workbook

Individual workbook for the course



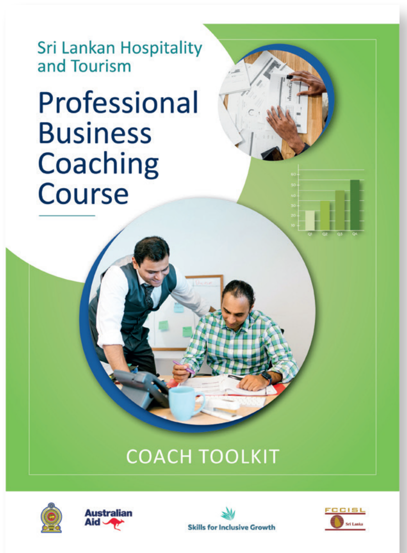
Portfolio

To record progress during the course and practical coaching experience



Coach Handbook

Reference guide to business coaching



Coach Toolkit (Ebook)

Templates and tools for use in business coaching

Section Listings

Section	Name	Description
Section 1	What is Business Coaching?	Introduction and overview.
Section 2	Basics of Coaching	Roles and qualities of a coach, resilience and ethics.
Section 3	Coaching Models	Introduction to TGROW, OSKAR and the Blended Coaching Model.
Section 4	Managing Change	The business life cycle and helping clients overcome resistance to change in the workplace.
Section 5	Diversity and Inclusion	Encouraging inclusive practices. Developing awareness of barriers and strategies to overcome resistance.
Section 6	Communication Skills	Effective communication skills for coaching, powerful questions, non-verbal communication and active listening.
Section 7	Building Successful Relationships	Creating trust and rapport to develop a mutually beneficial coaching relationship. Creating a coaching contract.
Section 8	Measuring Business Performance	Using KPIs to measure performance, promoting progress through business development services, updating goals and action plans.
Section 9	Business Leadership Skills	Discovering what leadership is and when to use and adapt different styles. Effective decision making and motivating others.
Section 10	Giving Feedback	Giving and receiving effective feedback, overcoming barriers and bringing the coaching relationship to an end.

Section 11	Growth Mindset	Identifying the characteristics of a Growth Mindset vs a Fixed Mindset. Understanding learning and growth. Defining values.
Section 12	Advancing as a Coach	Overcoming common coaching challenges such as miscommunication and conflict. Evaluating coaching progress
Section 13	Developing your Coaching Practice	Establishing and marketing a coaching business. Continuous professional development.

Abbreviations

BDS	Business Development Services
BEI	Business and Employment Indicator
CPD	Continuous Professional Development
FCCISL	Federation of Chambers of Commerce and Industry of Sri Lanka
GROW	Goal, reality, obstacles, way forward (GROW model)
ICF	International Coaching Federation
KPI	Key performance indicator
MSME	Micro, small and medium-sized enterprise
OPI	Operational Performance Indicators
OSKAR	Outcome, scaling, know-how, affirm and action, review (OSKAR model)
OTA	Online travel agency
PWD	People with disabilities
PWDA	People with disabilities Australia
SLTDA	Sri Lanka Tourism Development Authority
SMART	**S**pecific, measurable, achievable, realistic, time-bound (SMART Goals)
SWOT	Strengths, weaknesses, opportunities, threats (SWOT Analysis)
TGROW	Topic, goal, reality, obstacles, way forward (TGROW model)
TNA	Training Needs Analysis
WABC	Worldwide Associate of Business Coaches

Section 1

What is Business Coaching?

Introduction

In sports, coaches often guide people to develop and perfect specialised skills. Yet in business, it was simply a matter of getting on with it -until recently. Now however, organisations around the world, big and small, are realising the value of having an unbiased coach who helps their businesses overcome challenges and perform better.

Sri Lanka has become increasingly dependent on the tourism sector for its economy. In 2018, 2.33 million visitors brought in US $4.4 billion in total receipts. It's estimated 400,000 people directly, and 5 million indirectly, are supported through tourism. However the COVID-19 pandemic has shown the vulnerability of the sector.

The tourism sector is at a critical point. The country would like to attract more high-yielding visitors, but to do this we need to enhance our standards and add value.

The enterprises along the tourism value chain have to adapt. Businesses, particularly in the informal sector, need to reposition themselves as quality service providers, conscious of their client needs, respectful of their employees, protective of their natural environment, and efficient with their resources. Business coaches with experience in the tourism and hospitality sector are perfectly positioned to help them to do this.

This handbook, and the accompanying Professional Business Coaching Course, provide the foundation to become a business coach. While the materials are developed with the tourism and hospitality sector in mind, the coaching skills you will learn are transferable to any industry.

Business coaching is in its infancy in Sri Lanka, which makes it an exciting time to learn these skills, and use them to give back to the industry, and local communities. As a business coach, you will help businesses to have better standards, better options and better pricing solutions. This in turn will enable tourists to have a better experience and will lift the tourism value chain in its entirety.

Overview of Coaching

What is coaching?

The International Coaching Federation (ICF) defines coaching as "partnering with clients in a thought-provoking and creative process that inspires them to maximise their personal and professional potential".

Think back to a time in your professional or personal life when you supported someone one-on-one to achieve one of their goals. Perhaps you helped a colleague solve a problem, or partnered with someone to improve how they performed a task. That was coaching.

Coaching is a professional relationship that helps people move from where they are now (A) to where they want to be (B). It is about working with individuals (clients) to reach their goals, whether personal or professional.

Coaching is a client-driven process. While the specifics of each coaching journey will be as unique as the individuals themselves, coaching typically involves setting goals, creating an action plan to achieve those goals and navigating challenges that arise along the way.

Types of coaching

Coaching is a process that can be used in different ways for different purposes, depending on the needs of the individual. Common types of coaching include Career, Life, Business, Performance and Leadership.

1. **Career coaching** helps individuals identify what they want and need from their career and provides support for those facing issues or looking to make a career change.

2. **Life coaching** helps people gain clarity on their personal goals and take action to improve their lives. This type of coaching has broad areas of focus that include career, health, finances, confidence and relationships.

3. **Business coaching** supports entrepreneurs and business owners to identify and achieve their organisational goals and manage their businesses better. This handbook is focussed on business coaching.

4. **Performance coaching** helps individuals improve their performance. Performance coaches work with the individuals, their bosses and others in the organisation to identify gaps and develop professional development plans.

5. **Leadership coaching** helps people develop leadership skills. Often leadership coaches help people who are transitioning to higher levels of management or responsibility.

What is Business Coaching?

Business coaching is the focus for this handbook.

Business coaches work with entrepreneurs, owners and decision makers (clients) to help them plan and improve their businesses. Clients hire business coaches to increase productivity, profitability and effectiveness. Whether directly, for example by developing new products and strategic capability, or indirectly, for example through improved interpersonal relationships.

Business coaching is:

“the process of engaging in regular, structured conversation with a ‘client’: who is the recipient of business coaching. The goal is to enhance the client’s awareness and behaviour so as to positively achieve business objectives for both the client and their organization.”

(Worldwide Association of Business Coaches, 2011)

Business coaches are typically accomplished professionals who know what it takes to make a business successful. They work alongside their clients to help them define their vision for their business, identify goals and implement strategies that will help them achieve their objectives. The coach helps their client navigate problems and challenges in the most effective way possible.

The positive impact of business coaching

Business coaching enables organisations to have better standards, better operations and better products.

Example 1: Clarity on pricing

The Coral Tour Activity Group, used to charge Rs. 2,000-3,000, per trip regardless of the number of people involved (a boat can take a maximum of 6). After coaching, they now charge Rs. 2,000 per head for a group of 6, or Rs. 6,000 per trip for individuals or couples. Food and Beverages are now priced as a separate offering. This **clarity on pricing** has made it easier for people to book the tours, and increased profitability.

Example 2: Expansion

Rupika, owner of Salon Glamour in Polonnaruwa:

"I have been working in the industry for 30 years, I am now 55, I had the salon in the back of my house, people entered through my living room, I was thinking of closing it down permanently when I was included in the Blended Coaching Program. This was an eye opener and provided me with the motivation and directions to rejuvenate my business. I sold my car and even my jewelry to raise Rs. 5 million to move to a new location, hire 3 new staff, and create a business. In this short time, I have settled my debts, bought a new car and I feel enthusiastic about the future! Even during COVID times business is flourishing."

Example 3: Operational improvement

Mr Niroshan, owner of Yuhibuhi Forest Resort, Batticaloa:

"I come from 18 years in the financial industry, I joined the program because I knew I didn't know enough to run my business. My coach made me look at things differently and understand the processes that needed to be in place that weren't. He always made time for my questions and even shared a list of suppliers we could buy linen etc. from because products are very expensive to purchase here in Batticaloa."

What does a business coach do?

As a business coach you do not take decisions for clients, or solve their problems for them. The role of a coach is to facilitate ways in which clients can identify goals, overcome obstacles, improve their business performance and make correct business decisions.

As a business coach you do not need to be an expert in the business or industry of your client, although it can help. You bring coaching expertise that enables the client to become more self-aware and supply supportive, discovery-based approaches and frameworks.

Business coaches assist clients to:

- Define their vision
- Identify goals and objectives
- Identify new opportunities
- Improve systems
- Improve performance
- Solve problems
- Address skills gaps
- Increase confidence and self-awareness

To do this, coaches must win the trust of their client and build a relationship based on respect and honesty. Coaches must follow ethical practices and principles and maintain a high level of professional standards at all times.

Who do business coaches help?

Business coaching can be beneficial to businesses of any size and any industry. From a founder-run start-up without employees, to the largest organisation in the world.

This handbook and the Blended Coaching model it contains were primarily designed with mico, small and medium sized enterprises (MSMEs) in mind. However, the tools and the coaching methodologies you will learn are applicable to businesses of any size.

Business coaches help businesses at any stage in their growth. From an entrepreneur looking to launch a startup, to a struggling business needing improvement, to an already successful business wanting to expand.

What Does a Business Coach Do?

Following the methods outlined in this handbook, you will conduct regular face to face meetings with your clients to help them to:

- Determine the strength and commercial viability of their businesses
- Identify issues that may impact their success and ability to meet minimum industry standards
- Identify goals and implement strategies for improvement
- Motivate and build their teams
- Identify gaps and facilitate access to suitable support
- Monitor performance and provide feedback

As a coach operating within the tourism and hospitality sector, you may find yourself coaching MSME clients on such topics as:

- Product development
- E-tourism
- Customer service
- Sustainability
- Links to market
- Decision making
- Skill development
- Change management
- Marketing
- Human resource management
- Quality standards
- Business management
- Access to funding
- Recruitment and retention
- Problem solving
- Strategy planning and implementation
- Conflict resolution

Remember

Being a business coach isn't about making decisions for the client or solving problems for them. It's about working alongside the client, helping them identify goals, implement appropriate strategies, solve problems, overcome challenges and increase their self-awareness.

At the end of the day, these are things the client, not the business coach, has to be able to do.

How is the role of a coach different to other professions?

- **Coaching** is not the same as teaching, counselling, consulting or mentoring. All serve valuable - but different - purposes in the service of others.
- **Teaching**- Teachers set objectives and training usually follows a set curricular. The teacher (or trainer) has the knowledge and imparts it to their students. There is an imbalance of power in the relationship. Coaching does not follow a linear learning path and is collaborative, the coach helps the client discover the 'right answers' themselves.
- **Counselling** - Therapy and counselling deals with healing pain / dysfunction / conflict. It is focussed on the past. Coaching supports self-initiated change with a focus on the future and actionable strategies.
- **Consulting** - consultants are hired for their expertise. The expectation is they will diagnose and prescribe solutions. Both coaching and consulting are future-focussed, however, in coaching it's assumed that the client is capable of identifying and generating their own solutions.
- **Mentoring** - A mentor provides wisdom or guidance from their experience. The coaching process focuses on clients identifying and reaching their own objectives.

The following table explores the differences between mentoring, coaching and counselling further.

	Mentoring	**Coaching**	**Counselling**
Aim: to help an individual...	Learn and grow faster than they would alone	Maximise their personal and/or professional potential	Overcome psychological barriers
Focus	Typically future oriented	Typically present oriented	Typically past oriented
Qualities	Long-term Informal Parameters for growth are loose Relationship oriented Development-driven Advisory - experienced professional acts as a trusted guide	Short-term Formal and structured Specific and measurable Task oriented Performance-driven Collaborative - co-created process of change	Long-term (varies) Formal Builds self-awareness and self-understanding "Why" oriented Theory-driven Diagnostic - therapeutic intervention by licensed medical professional
Relationship	Informal, usually unpaid	Formally, usually paid	Formal, usually paid

The term ‘coaching’ can mean different things to different people. It is important for you to understand how coaching differs from other forms of ‘helping’ professions. You must clearly understand the difference, be able to explain this to your clients and set appropriate boundaries.

Remember

While some clients may find coaching therapeutic, coaching is not a therapy. Coaches should not provide unlicensed counselling.

Benefits of Business Coaching

Business coaching has many and diverse benefits for the client and the client’s business (or wider organisation).

Short and long-term benefits include:

For the client

- Increased clarity and perspective
- Clearer goals and objectives
- Increased commitment and focus
- Increased confidence and accountability
- Increased productivity
- Increased opportunities for learning and development
- Increased motivation and self-awareness
- Increased ‘bigger picture thinking’
- Better relationships, teamwork and reduced conflict

For the business

Relationships

- Enhanced teamwork and improved working relationships
- Improved motivation and morale
- Positive culture change

Personal development

- Empowered individuals
- Problem-solving abilities improve
- Increased knowledge transfer means more continuity in the business
- Identification of needs creates opportunities for effective training and development

Performance

- Improved motivation and performance
- Increased efficiency and productivity
- Increased profitability, quality and customer satisfaction
- Clients can create a coaching culture within their business

Health and Wellbeing

- Job satisfaction increase
- Improved self-awareness. Clients are happier and healthier
- Improved work-life balance results in reduced sick-leave, positive staff retention and reduction in recruitment costs.

Why Become a Business Coach?

Typically the people who become business coaches have business experience and have achieved success in the area they intend to coach in - in this case the tourism and hospitality sector. Coaches come from a variety of backgrounds, such as current business owners, professional mentors, high-level trainers and retired experienced professionals.

People who choose to become business often share common motivations, such as:

- Having reached a certain stage in their career they look to share their experience with less-advanced business operators
- To help others
- To work in an interesting and challenging field
- To become self-employed
- To help Sri Lanka develop its economy

Successful business coaches typically:

- Enjoy helping others to succeed
- Consider themselves a 'people person'
- Have a mind for business
- Have extensive experience supporting business growth and development
- Have a lateral, challenging way of thinking
- Have good computer and digital literacy skills
- Have a broad range of business knowledge
- Are self-aware
- Value learning as a way of growing
- Are excellent communicators
- Are comfortable giving feedback and holding clients accountable

The Blended Coaching Model

The model that you will learn in this handbook and the accompanying Professional Business Coaching Course is called Blended Business Coaching. In this model, coaching is integrated with proven best practice systems to give clients support, tools and resources to restructure their enterprises and rethink their organisational objectives and processes.

This model is proven to lead to improved business resilience and enhanced standards in Sri Lankan businesses.

About the Blended Coaching model

In the Blended Coaching model, coaching acts as the lead to introduce business owners to other business development services and activities, such as skills training and exposure visits to observe and learn from other successful businesses.

During the coaching, the business coaches collaborate with their clients to identify which development stage the organisation is currently at and to understand it’s performance metrics. Once they have a clear picture of the business, the client and coach agree on goals and create an action plan to achieve them. As part of the coaching process, the coach also identifies any skill and process gaps and produces an action plan to overcome challenges.

The coaching needs of a new start up are likely to be very different from the needs for an established business with multiple employees. The Blended Coaching model takes this into account and provides tools for the coach to identify and support clients at different stages of the business life cycle.

Through regular coaching sessions, performance is monitored, challenges overcome and goals achieved. The cycle then continues, with revised goals set leading to further improvements.

Benefits of the Blended Coaching model

This Blended Coaching model has been proven in Sri Lanka's tourism and hospitality industry to result in:

- Operational and infrastructure changes
- Skills training
- Creation of value add components
- Improved customer service
- Creation of additional revenue streams
- Improved ability to manage operations during all seasons
- Improved retention of skilled employees
- Increased motivation
- Increased business understanding and awareness of operational needs

These outcomes have a direct impact on the business sales, control of expenses and business reputation, the main components of profitability. Increased profitability is the source for increased income, business resilience and job creation.

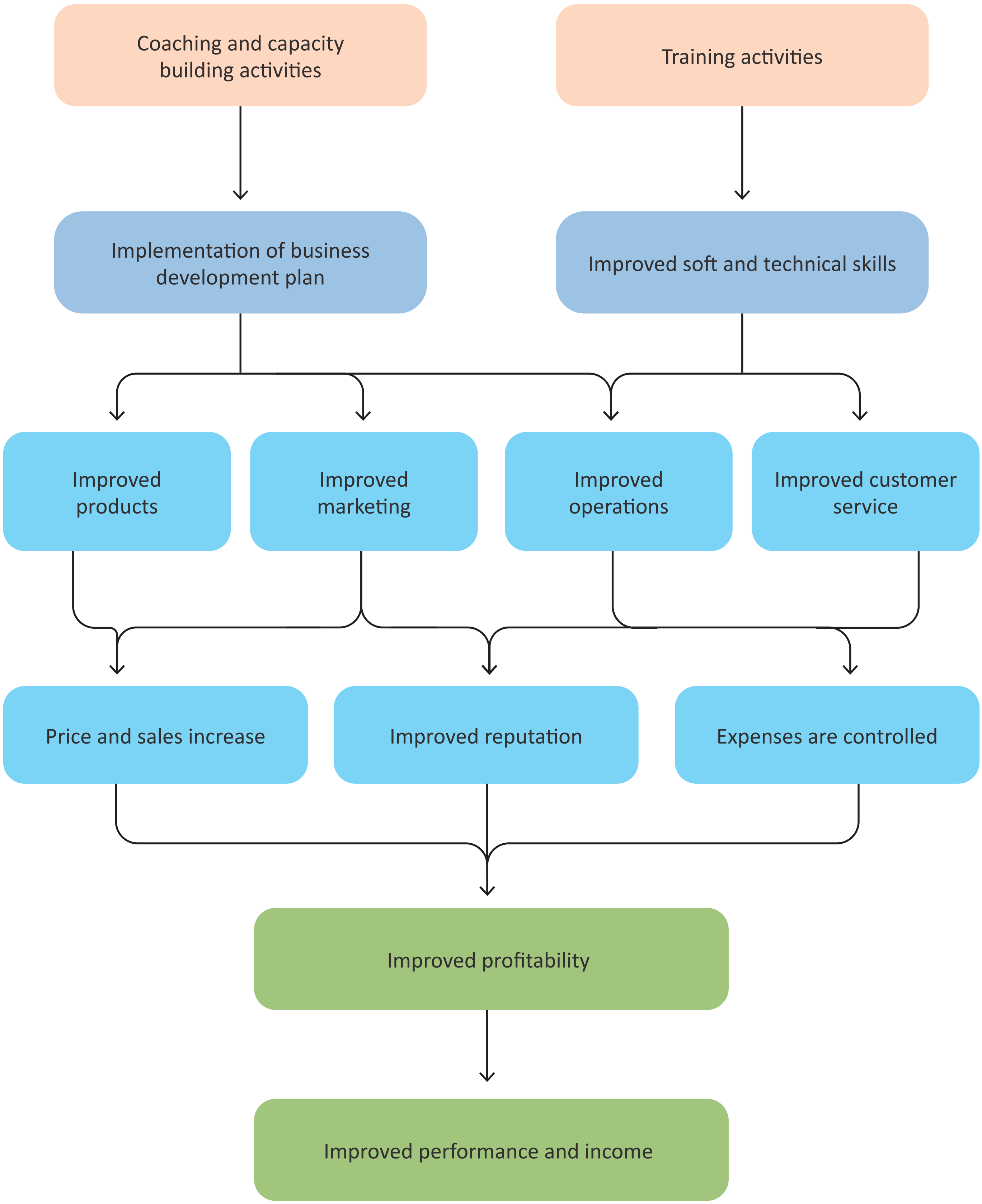


Diagram S1-1: The benefits of business coaching

Flexibility in Business Coaching

Coaching is a flexible process and coaches must adapt the support they give to the needs of individual clients. Some clients will have very clear ideas of the goals they want to achieve, others may be aware they need to make changes but don't know where to begin.

Imagine that you are a trainer at a gym. You have two new clients. One has a very specific goal of running a half marathon in 3 months time. The other wants to lose a bit of weight and generally feel healthier. Would you give them both the same training plan?

The answer is, of course not. For the first client you would focus on their running fitness, giving them achievable milestones that gradually build them up to 21km. For the second client you would explore their current level of fitness, flexibility and strength before designing a workout plan to help them improve across many areas.

Both clients have goals. But one is clear and specific, the other is not. In business coaching you will meet clients with different levels of clarity on what they want to achieve.

The following examples show two business owners who both want to work with a business coach, one has specific goals in mind, the other does not.

Client A: Piyumi

"I grew up in a mountainous part of Sri Lanka, started taking foreign tourists on trekking tours in those mountains, and have owned my own trekking business for nearly 10 years now. I employ 16 people, including six experienced guides, plus drivers and support staff. We organise three types of trekking tours according to levels of difficulty – easy, mild and challenging – and offer tours from one to four days.

There are two things I'd like my business coach to work on. First, with the 2019 Easter bombings and the 2020-21 coronavirus pandemic, I lost a lot of foreign customers and I realise I need to redesign my business for a more Sri Lankan market. This will mean making the tours more 'family-friendly', with less walking and more driving between beauty spots and viewpoints.

The other thing is this. I bought a house in a remote mountain village that would make a great eating and stopping-off place for people during walks and treks. They could have breakfast there at the start of treks and have lunch or tea there in the middle of treks. Other trekking companies could use it too – paying me a fee, of course. But that will mean hiring new staff to cook and serve food and installing new catering facilities, which I haven't had experience of before..."

Coaching approach:

Piyumi is experienced and seems to be clear about her needs. She has developed her business to a certain point and has a good awareness of the field she works in, including current challenges.

Because Piyumi has identified two goals she wants to work towards, a business coach can expect a high level of direction from her. Her business coach could use a coaching model that begins with goals, then looks at the current reality and the steps that need to be taken to reach the desired outcomes.

Client B: Suresh

"My business is called Suresh's Hotel and Tours. My wife complains about this name because she says it's confusing to customers. It covers two different things, the hotel and the tours. Yet at the same time the name doesn't cover everything we do!

We started with a small cafe providing breakfast, lunch and dinner to local and foreign tourists.

My wife prepared the food and, at some point, she started offering lessons to foreign tourists in Sri Lankan cooking. Also, we converted part of our house into guestrooms and started providing accommodation as well as meals for tourists. Hence, the 'hotel' part of our name. Meanwhile, because some foreign tourists complained about the unreliability of local tuk-tuks and vans, I started using my own vehicle to drive people around. Gradually, I started taking them on tours and some local hotels have even passed guests onto me, for day trips. Hence, the 'tours' part of our name.

Some areas of our business make more money than others, and some areas may even be losing money. I'm just too busy doing different things to investigate! Another problem is staffing. I draw on members of my extended family to help me, whenever they're available, and sometimes we have too many people working on the premises and at other times we don't have enough. That's why I'd like to work with a business coach. I felt my business is disorganised at the moment and perhaps he or she could examine it and tell me what I need to do to improve."

Coaching approach:

Suresh is not clear about what his needs are. His business has several different strands and he doesn't seem able to monitor or control them well. He hopes a business coach can make sense of it for him and then offer guidance.

The coach will need to observe and monitor the performance of Suresh's business to get an idea of what his goals should be. What needs to be improved – his products, marketing, operations and / or customer service? What sort of planning and training needs to be done to achieve these improvements? The coach needs to help Suresh find this out.

To assist Suresh, his business coach could use the blended coaching model, which begins with an evaluation of the current business situation, then moves to set appropriate goals.

Business coaches need to be flexible enough to adapt their approach to the needs of each individual client. Section 3: Coaching Models introduces three different models, including blended coaching, that can be used in different circumstances.

Section 2

Basics of Coaching

Introduction

The role of a business coach is varied. A lot depends on the individual client, the stage their business is at, what they want to achieve through coaching, and the level of support they require.

This section introduces the basics of business coaching, including the diverse roles a coach takes on and the skills effective coaches use. It covers techniques to help your clients build resilience and generate insight, so they can identify and work towards solutions for their problems.

This section also covers the important areas of ethics and professional standards. As a business coach you will be privy to sensitive commercial and personal information. It is vital that you treat this with respect and confidentiality.

The Coaching Journey

Each client you work with will be unique. This means your coaching will be too. Business coaching is flexible and a good coach will artfully tailor their offerings to meet the needs of their client.

At the same time, there are common stages that each coaching relationship will go through. These are preparation, first meeting, regular coaching sessions and the final session. Each of the stages in the coaching journey will be covered in more detail in this Handbook.

Prepare
Plan for your coaching process and research your client and their business sector.

First meeting
Get to know your client, set the tone for your coaching relationship and assess your client's current situation.

Ascertain your client's desired goals and look for options to reach them. Formally agree the Coaching Agreement and establish appropriate boundaries.

Regular Sessions
Each coaching session will be unique. They typically begin with follow up on actions agreed in the previous session, and review of the progress made.

These sessions can be used for ongoing monitoring, performance updates, tackling new problems and responding to changing circumstances to help your client keep moving towards their goals.

Final Session
This is a wrap up session at the end of the coaching process to review and solidify what the client gained from their coaching experience and celebrate their achievements. It sets them up for life and business 'post-coaching'.

The varied roles of a coach

A business coach takes on a variety of different roles in order to help their client progress. These include helping clients:

- Feel more confident
- Grow their business
- Identify what needs to be improved
- Find their own solutions
- Set goals
- Break goals down into manageable tasks and deadlines
- Be resilient in the face of setbacks
- Make decisions
- Gain insight

Business coaches achieve this by building relationships with their clients, asking probing questions, sharing knowledge and giving honest feedback.

What Makes an Effective Coach?

Coaches are as individual as the clients they help. However, regardless of the type of coaching, successful coaches are:

- Trustworthy
- Committed
- Enthusiastic
- Compassionate
- Able to empathise
- Great listeners
- Organised
- Flexible and adaptable
- Responsive to feedback
- Focussed on goals
- Creative thinkers
- Great communicators
- Supportive
- Genuine
- Insightful
- Resilient
- Encouraging
- Patient
- Persuasive
- Tactful
- Tolerant
- Reliable

They also have business experience, a commitment to quality, a high level of personal integrity and a desire to contribute. And of course, a passion for business coaching.

Skills for business coaching

Effective coaches use a wide variety of skills. You may be surprised that many of these are already in use in your day to day professional life. Others may need time and attention to develop.

Skill	Explanation
Instruct	Impart knowledge or skills
Analyse	Study thoroughly and examine
Train	To teach through practice and instruction
Facilitate	To help bring desired outcomes about
Direct	Supervise conduct or action
Delegate	Assign responsibility to another
Assist	Give additional support to another
Collaborate	Work jointly with others
Guide	To direct and influence the behaviour and actions of another
Motivate	Provide others with a need or reason to act
Nurture	Further the development of others
Support	To give aid and assistance to others

Communication

Effective coaching is driven by communication.

It is a coach's highly developed communication skills that will help clients gain maximum benefit from each coaching session.

Communicating as a business coach is covered in detail in Section 6: Communication Skills. Here is an introduction to the types of skill you will need to use.

A skilled coach will:

- Know when to be quiet and listen actively
- Be open and straightforward
- Speak clearly

- Ask questions to check their own understanding
- Ask questions to check that the client has understood
- Give the client opportunities to ask questions
- Adopt a pace that suits the client
- Smile and use positive expressions

Coaching Mindset

Coaches are as individual as the clients they help. However, regardless of the type of coaching, successful coaches are:

Coaching is a client centered relationship. Great coaches lead by example. They care about unlocking their clients' potential and helping them to realise it.

In order to do this, the coach has to have a proper mindset that will facilitate their clients' learning and reflection.

To develop a coaching mindset, focus on ways to:

- Build strong relationships
- Use a process for coaching conversations
- Allow the client to discover their own answers and solutions
- Promote accountability by identifying concrete actions and potential barriers
- Encourage action after each coaching session
- Proactively share and encourage feedback
- Value the person first
- Enhance your client's ability to think about new possibilities
- Promote growth and improvement
- Challenge your client to aim for excellence
- Provide context and 'big picture thinking'
- Continually learn and improve your skills as a business coach

Positive coaching mindset

Part of coaching is believing that everyone has the potential to succeed. This makes positivity an important part of a coaching mindset. The table below shows the differences between a positive outlook that encourages growth and success, and a negative outlook that blocks progress.

Positive coaching mindset	Negative coaching mindset
People want to succeed	People only care about their paycheck
People can grow and change	People never truly change
People will rise to the expectations set of them	People will only do the minimum required
People are fundamentally good	People are untrustworthy and lie

Developed from source: https://www.inc.com/lee-colan/the-power-of-a-positive-coaching-mindset.html

Your coaching mindset also impacts you. Do you think you are capable of change and improvement? Can you lead and coach with excellence?

Developing a positive mindset will set you on the path to coaching success. This is covered in more detail in Section 11: Growth Mindset.

Building Resilience

Resilience is the psychological quality that allows some people to be knocked down by the adversities of life and come back at least as strong as before. A resilient person does not let failure or difficulties stop them. They find a way to recover, adapt and continue moving towards their goals.

Building resilience in clients is one of the many roles of a business coach. A resilient client will be better able to take on feedback, overcome challenges and make their business successful.

Resilient people tend to have the following qualities:

Quality	Explanation
Self-belief	They believe they can succeed
Optimism	They see the future as bright
Self-confidence	They believe in themselves and their abilities
Positive	They have a positive attitude
Self-management	They can manage their emotions. They do not allow themselves to get upset at every challenge, failure or mistake.
Reframing	They see challenges, failures and mistakes as opportunities to learn.
Future minded	They focus on a better future rather than on the failures and mistakes of the past.

Examples of resilience

A resilient person might say:	A less resilient person might say:
I'm usually optimistic. I see disappointments, challenges or failures as temporary and expect to overcome them.	There are many factors that make running my business difficult. Failures often happen to me and are challenging to overcome.
When I get angry or upset because of disappointment, challenges or failures I soon get over it.	It takes me a long time to get over failures or disappointments.
I can still feel self-confident when things are very uncertain.	When things are uncertain, I find it hard to remain confident in my abilities.
I adapt quickly to new developments. I can cope with change.	I find change stressful. It takes me a long time to adapt to new developments.
I learn valuable lessons from my experiences and from the experiences of others.	I try not to think about my negative experiences, they are uncomfortable.

A resilient person might say:	A less resilient person might say:
I'm good at solving problems. I'm good at making things work well.	I don't enjoy problem solving, sometimes I prefer to ignore a problem, rather than tackle it head on.
I'm strong and long-lasting. I hold up well during tough times.	During tough times, I get stressed and find it harder to focus.
I'm playful. I can have a laugh even in difficult situations. I can laugh at myself.	My reputation is very important to me. I don't want to be seen as a failure or to be laughed at.

How to become more resilient

Psychologists have found that certain personal traits tend to make people more resilient. These include having a positive attitude, optimism, the ability to regulate emotions, and the ability to see failure as a form of helpful feedback.

Some people are naturally more resilient than others, but specific skills that build resilience can be learnt.

These include the ability to bounce back from negative thoughts and looking for upsides when faced with setbacks.

Example
Your client, Farha, runs a hotel with 10 rooms in Kalpitiya. Since your last coaching session, she's discovered that her Tripadvisor rating has fallen from number 2 in Kalpitiya to number 10. She is really disappointed, and feels that this will severely damage her business.

Facing this setback, Farha says to you: "I always receive bad guests who write unfair reviews. I don't know why they choose my property if they are only going to be nasty about it. We do our best, but they want a 5 star experience at 3 star prices. There's nothing I can do".

Farha is not displaying resilient characteristics. As her business coach, you can help her to change this.

1. **Challenge her negative thoughts.** Ask Farha to think about times when she did receive good reviews. Until recently her hotel was number 2 in the region, so there must be plenty! What specifically did the positive reviews mention? Was it the friendliness of staff? The beautiful location and spacious rooms?

   Ask her to write these down in a list. This will help her feel more confident about her product and remember what she is getting right.

2. **Identify upsides from the setback.** Clearly something has changed recently that has affected how guests view the hotel. The guests have written negative reviews, but Farha can use this feedback to identify the problem.

   The recent reviews talk about the food negatively. You discuss with Farha exactly what the guests wrote, and ask her why she thinks they might say this. Farha recently hired a new chef for the breakfast service and the complaints on food show his cooking is not up to standard. The guest feedback allows her to correct the problem, before other guests have the same experience.

3. **Create a way to move forward.** Now the problem is identified, you help Farha put a plan in place to overcome it.

   She discusses with the chef and discovers that he is not familiar with the Western dishes on the menu. He has been guessing at their preparation. Farha arranges to have him trained by her dinner chef, and supervises the breakfast service for several days to check he maintains the expected quality of dishes.

   She also replies to the negative comments on Tripadvisor thanking the guests for their feedback, and reassuring them that steps have been taken to correct the problem.

Generating Insight

Sometimes we need to see things differently to see them clearly. An effective business coach can ask the ‘right’ questions and help clients see things from a new viewpoint - to solve problems.

You may have noticed yourself that when you have a problem, your thoughts can be repetitive and circular. External assistance is needed to help you shift into a different way of thinking.

Insight often leads to an ‘ah-ha’ moment, where suddenly something becomes clear. This might be the solution to a problem or the answer to a question that has been puzzling you. It is a very powerful form of learning that is memorable and significant.

As a coach you can help your clients have their own ‘ah- ha’ moments, this often comes through posing and answering questions.

How to help a client gain insight

The below steps are useful in helping others have moments of insight.

1. Listen carefully. Be patient and let them explain their current thinking about the issue.
2. Add something new to the conversation to stimulate their thinking. This could be an open question, such as ‘why do you think....’, or ‘what surprised / challenged you about …’. Remember, you are not trying to provide solutions, you are trying to help them think differently.
3. Wait. Allow your client to process the question and / or information. Do not rush them. It takes time to process new thoughts and ideas.
4. If you have sparked insight, you will likely see a change in body language. If not, return to step 2 and ask another question, or share a piece of information.

Both the client and the coach have a role to play in creating insight. The client does the thinking, while the coach acts as a catalyst to stimulate the client to think differently.

Remember

When helping clients gain insight, you must not suggest solutions. Avoid phrases such as ‘Have you tried …’ and ‘Why don’t you …’.

The goal is not to tell your client what to do, it is to allow them the space and time to come up with their own ideas.

Coaching Styles

Each of your clients will respond to coaching differently. Some may appreciate a lot of structure, while others will respond better to a more fluid approach. Effective coaches are able to adjust their behaviour and approach to meet the needs of each client.

Each coach has their own personal style based on their experience and personality. As a new coach, try to identify what your natural style is. Once you understand your natural style you can learn to adopt other styles that suit the needs of your clients.

Why are coaching styles important?

Selecting the right coaching style for your client is important for building rapport. The wrong style can block progress and create barriers to communication. Be sensitive to your clients and flexible in your approach.

Autocratic style

An autocratic style is highly structured. The coach controls the flow of the coaching session and the client is encouraged to follow a pre-established pattern.

- Discipline-based
- Coach is an authority figure who makes decision
- Little room for tailor made approaches or flexibility

Useful for: Situations where a collaborative approach may not be optimal, or where only the coach has sufficient expertise to make important decisions.

Democratic style

A democratic style is participatory. The client takes an active role in controlling the coaching process, which the coach guides gently.

- Takes the clients interests, preferences and opinions into account
- Client input is essential
- Space for tailor made coaching
- Coaches have the last word in decision making

Useful for: Situations when the client needs to take responsibility for their own results. To encourage a sense of self-empowerment and control.

Laissez-faire style

A laissez-faire style is one with minimal leadership. It is based on the idea that the client is able to achieve their own goals.

- Client is the primary process owner
- May be considered ‘hands-off’ approach
- Regular performance monitoring and feedback is important

Useful for: Clients who require minimal guidance and support.

AUTOCRATIC	DEMOCRATIC	LAISSEZ-FAIRE
Productivity	Motivation	Self-confidence
Trust in the coach	Creativity	Decision making ability
Realistic goal attainment	Productivity	Freedom
Efficiency	Empowerment	Autonomy
Stress reduction	Commitment	Self-reliance

MOST → LEAST

COACH INVOLVEMENT

Example: Autocratic style

Sometimes clients are unable to envisage the desired end result based on their personal experience. In these cases, an autocratic approach can be appropriate.

Chula runs a five room guest house near Tangalle. He has operated for two years, and would like to charge more for his rooms. His coach has advised him that foreign tourists prefer dry, not wet bathrooms, so Chula suggests adding rugs to the bathroom floor. This would not resolve the issue, as the shower water would run all across the bathroom floor and get the mats wet.

The change Chula suggests would not solve the real problem, therefore the coach takes an autocratic approach. She explains using clear instructions that the shower needs a curtain and the uneven floor should be fixed so the water flows directly to the drain by the shower. The coach gives Chula the specific information he needs to make a successful change.

Remember

Clients may need different styles of coaching at different stages of the coaching process. If your client is not responding well to a particular approach, try changing the way you interact with them to achieve the desired results.

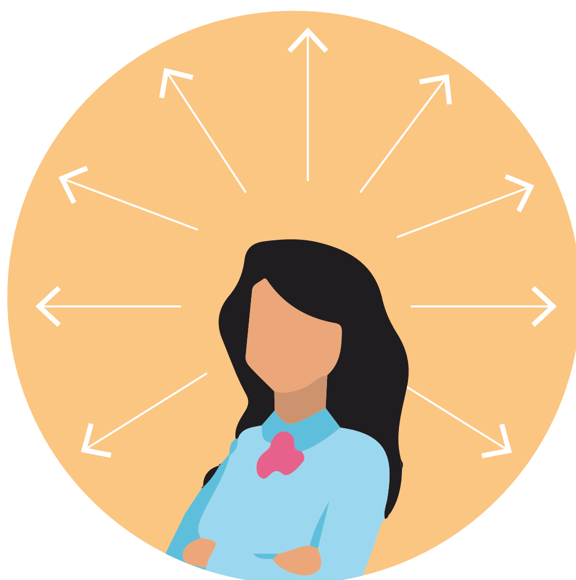
Coaching Approaches

Inside-out and Outside-in are two approaches to coaching. They may sound complex, but are actually simple.

The **Inside-out approach** is also known as the **"ask" approach**. It is based on the belief that a person is capable of succeeding, if the things holding them back are removed.

The **Outside-in approach** is also known as the **"tell" approach**. It is based on the belief that a person can succeed if they are given the information / tools / knowledge. Examples of this are common in business, such as a restaurant manager telling his waiter how to set a table.

In coaching the 'ask approach' is used more often since the role of the coach is to support clients to be and do their best. However, there are certain times when a 'tell approach' is needed. Knowing when to use this will strengthen your relationship with your clients and your effectiveness as a coach.



Approach	Inside-out	Outside-in
Also known as	“Ask” approach	“Tell” approach
A person can achieve success if:	Interference is removed	They have the knowledge required
Asks	“What can I bring out of them to enable the person to succeed?”	“What can I put in to give the person the answers to succeed?”
Used for	The majority of coaching conversations	Urgent action Policies / practices that must be followed, such as for safety, liability, consistency reasons
Examples	Solving complex problems through discussion and collaboration, deciding on new products, bringing out the client’s vision	Giving advice, urgent direction, explaining complex policy, showing someone how to use excel, or to create a budget, instructing someone on regulations

The Outside-in approach can be used when both of the below conditions are met:

1. The coach is an expert and can effectively communicate their knowledge
2. The client is interested in what the coach has to say, and aware enough to act on it.

If these conditions are not met, usually the Inside-out approach will be more effective in coaching.

Both approaches have a time and a place when they should be used. Consider the following Food and Beverage related examples:

Example A: Sakthi
Sakthi works as a tour guide and wants to start providing home made lunches to his clients. He needs to learn how to do this properly and safely. His coach is an experienced hotelier who knows about food hygiene. He can tell Sakhti about safe food preparation and storage. Here, an outside-in approach is appropriate.

Example B: Kaushali
Kaushali runs a homestay. Currently she offers Sri Lankan breakfast but many guests ask for non-spicy food. She wants to offer other options. Here, an inside-out approach is appropriate. The coach can make suggestions of dishes and discuss with Kaushali, but she should make the final decision.

Ethics and Professional Standards

In many professions, including medical and legal, professional codes of ethics and standards are clearly defined and regulated. These standards and ethics are grounded in societal values that relate to trust and confidence, power and status and conflict of issues.

As a relatively new profession, coaching remains largely unregulated. However, coaches deal with much sensitive and personal information. Because of this, a self-imposed code of ethics for coaches is essential to provide guidelines and standards against which coaches' performance can be measured and evaluated.

International coaching bodies have created their own standards of professional practice. While these vary, factors common to all include:

1. **Do no harm:** do not cause needless injury or harm to others
2. **Duty of care:** act in ways that promote the welfare of other people
3. **Know your limits:** practise within your scope of competence
4. **Respect the interest of the client**
5. **Respect the law**
   Source: *Diane Brennan and Leni Wildflower (2014: 431–2)*

Internationally accepted ethical principles of coaching include:

Principle	Description
Reputation	Coaches will act positively and uphold the highest standards in a manner that reflects well on the individual coach and the profession at large.
Continuous Improvement	Coaches will commit to continuous learning and enhancing their experience, knowledge, capability and professional skills
Competence	Coaches will maintain high standards of competence in their work
Integrity	Coaches will represent themselves in an honest and fair manner, including being knowledgeable about their particular competencies and personal limitations.
Awareness	Coaches strive to be aware of their own belief systems, values, needs, and limitations and the effect of these on their work.
Respect	Coaches will treat clients with dignity and respect, being aware of cultural differences, their own cultural background and biases, and the client's right to autonomy, privacy, and confidentiality.

Principle	Description
Inclusivity	Coaches will avoid discrimination by maintaining fairness and equality in all activities will not knowingly participate in unfair or discriminatory pratices. This includes, but is not limited to, discrimination on the basis of age, race, gender, ethnicity, religion, sexual orientation, disability, language or socio-economic status.
Confidentiality	Coaches will maintain the strictest levels of confidentiality with all parties as agreed upon.

Developed based on the IAC's Ethical Principles: https://certifiedcoach.org/about/ethics

Codes of ethics cannot offer a solution to every ethical problem however, they provide a firm foundation on which to base the discussion and decision.

Your personal ethics

As a coach, your ethical behaviour is your own responsibility. Ethical dilemmas - if treated appropriately - can be sources of important personal growth and professional development.

Examples of dilemmas a business coach might face:

1. When you go to meet a new client you realise their main competitor is someone with a successful business you know a lot about.

2. Your client advertises that their hotel is registered with the SLTDA – but it isn't.

3. Your client makes his staff work very long hours with no days off and for low wages. This is how they make a small profit from their hotel.

Doing what is 'right' may not always feel right. Notice these times and reflect on them as an opportunity for learning and self-awareness.

Remember

You may find yourself worrying over a professional decision you have made. This is a sign that you are committed to your clients and want to provide a service that is right for them.

Successful coaches continuously reflect on their own values and bring awareness to how those values could influence the decisions they make in their coaching practice. See Section 11: Growth Mindset for more information on self-awareness.

Privacy and Confidentiality

A coaching relationship is built on trust. Trust is underpinned by respect for the client's privacy and confidentiality. As a coach, you are expecting the client to share information about their business. Not only is this commercially sensitive, the coaching will reveal their feelings, attitudes, experiences and inspirations.

You will be privy to sensitive information. From the outset it is necessary to state explicitly the terms of confidentiality that you will observe and inform the client of their right to privacy. They should never be made to feel they are under pressure to answer your questions.

At the same time, it is important for the client to be honest with you and to share relevant information fully.

Example
Imagine that you are coaching the owner of a small coffee shop. They don't want their competitors to find out about a discount they negotiated with their supplier so they provide you with false information about the cost of their ingredients.

You help them to update their menus and prices as part of the coaching. But since the calculations are based on false costs, when you review the outcome in your next coaching session with the client, the figures for profit and loss don't make sense.

Confidentiality when coaching organisations

As a business coach you may be hired by a medium - large organisation rather than an individual. This is typically to coach a member of their team who needs particular support. While you are coaching the individual, the organisation is your employer.

Imagine you are hired by a hotel chain to coach the general manager at one of their hotels. In this situation, the coaching relationship extends beyond just you and your client (the general manager). The company boss and corporate HR want to know details about how the coaching progresses, since they are paying for it. What information will you share? With whom?

This type of coaching requires a balance between the interests of your employer and an appropriate level of confidentiality with your client. The type and amount of information you will share, how you will share it and with whom, should be agreed at the start of the coaching process and made clear to all parties. See Section 7: Building Successful Relationships for information on creating a formal Coaching Agreement.

Confidentiality between the coach and client is a cornerstone of any coaching relationship.

Unless the client trusts the coach, and is willing to be completely honest with them, it will be difficult for the coach to accurately understand a) their client's business situation and b) the challenges they face.

The client must trust that information they give to the coach will go no further. They must also feel that they are in a safe and non-judgemental environment where they can share information and concerns honestly.

Business Coaching Portfolio

Recording your coaching experiences in a portfolio is an effective way to reflect on your learnings and your progress. It serves as a record of your growth and development and you may wish to continue a similar practice after the course, to record your ongoing professional development. Documenting your coaching experience, including the number of hours with clients, will also help you obtain a coaching license, should you wish to.

A coaching portfolio accompanies the Professional Business Coaching Course. The portfolio has two elements for use during the theory and practical parts of the training course.

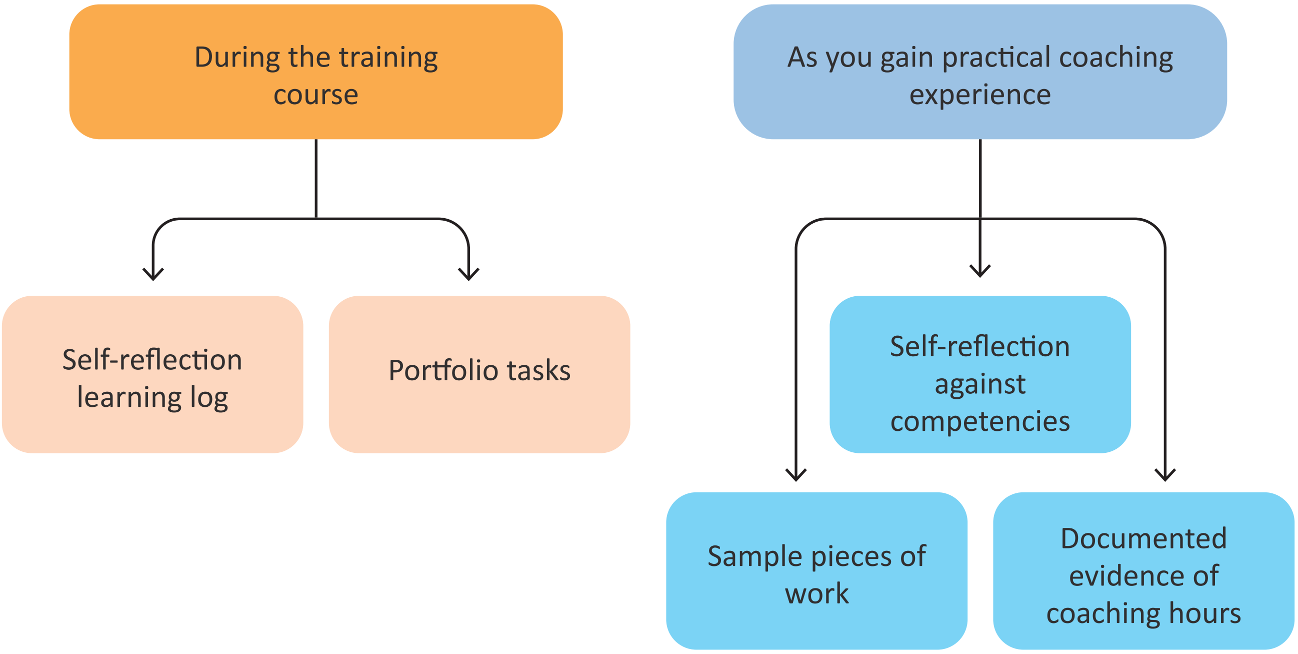


Diagram S2-1: Elements of the Portfolio

In Section 8: Measuring Business Performance you will learn more about the importance of record keeping as a coach.

Business Coaching Do's and Don'ts

Do	Don't
✔ Set effective boundaries	✖ Assume clear understanding
✔ Explain the coaching process clearly	✖ Jump to providing solutions
✔ Tailor your coaching style to suit the needs of the client	✖ Take it personally if you experience resistance to change from the client
✔ Check for understanding and agreement	✖ Develop take responsibility for your clients' actions
✔ Follow up	✖ Expect perfection
✔ Agree timelines	✖ Provide all the answers
✔ Use clarity and empathy in every interaction	✖ Be rigid in your approach. Coaches must be flexible and tailor their style

Section 3

Coaching Models

Introduction

Over the years, tried and tested models have been developed that create a framework for the coaching process. There are many models available. This section outlines two of the most famous internationally: TGROW and OSKAR. These models work for any type of coaching. They are great for understanding the basics: how to engage your client, support them to establish goals, and identify practical steps to achieve them.

Next, this section introduces a model designed specifically for use in business coaching in Sri Lanka, called Blended Coaching. This model is particularly effective for MSME businesses but can also be used with larger, more established companies. It is tried and tested for use with the tourism and hospitality sector.

The Blended Coaching model begins with a thorough understanding of the client's business. In this section you will find practical tools for data collection and learn how to establish effective key performance indicators and action plans for your clients.

Common Coaching models

TGROW and OSKAR are two widely known international coaching models. They both provide a structure for coaching, but with different approaches. In TGROW, the focus is on overcoming obstacles to achieve goals. In OSKAR, the focus is on possible solutions, rather than deep diving into the causes of problems.

Both are useful in business coaching. Learning how to apply both will give you flexibility to help your clients in the most effective way for them.

The TGROW model is based on one of the most popular and successful behavioural coaching models, GROW.

- GROW has four stages: Goal, Reality, Obstacles and Way Forward.
- GROW evolved into TGROW to make it more relevant for business coaching. 'T' for 'Topic' was added.
- The TGROW model is easy to understand and straightforward. It outlines the process of problem solving, goal setting and performance improvement.

The OSKAR model is a solutions focused model.

- OSKAR has five stages: Outcome, Scaling, Know-how, Affirm and Action, and Review.
- The goal of the model is for the client's attention to be moved away from problems towards solutions.
- This model emphasises progress and positive achievement.

Later in this section, you will be introduced to the Blended Coaching model. This is designed to meet the needs of business coaching in Sri Lanka.

Remember

To use any of these models requires questioning and listening skills. Coaching is a collaborative and cooperative process. The coach and the client work together to create or identify a solution that meets the client's needs.

TGROW Model

The GROW model was developed in the 1980s by business coaches Graham Alexander, Alan Fine, and Sir John Whitmore and published in Whitmore's 1992 book 'Coaching for Performance'. It became hugely popular as an effective, and easy to use model. In 2003, in his book, 'Effective Coaching', Myles Downey expanded the GROW model into TGROW to optimise it for business coaching.

It is simple to understand the five stage TGROW model by imagining you are planning a journey:

1. First you decide what type of journey you need to take (**topic**). Is it a day trip, or a long holiday? For pleasure, or business?

2. Then you identify a destination for your trip (**goal**). Will it be to the beach or the hills? Which hotel exactly?

3. Before you know how to get there, you must identify your starting point (**current reality**). Where are you now? Where are you departing from?

4. Next you consider the various routes possible (**options/obstacles**). Will you take a train, drive, or get a bus? If by road, are there any major roadworks that could delay you?

5. Finally, you commit to your plans for the trip and depart (**way forward**).

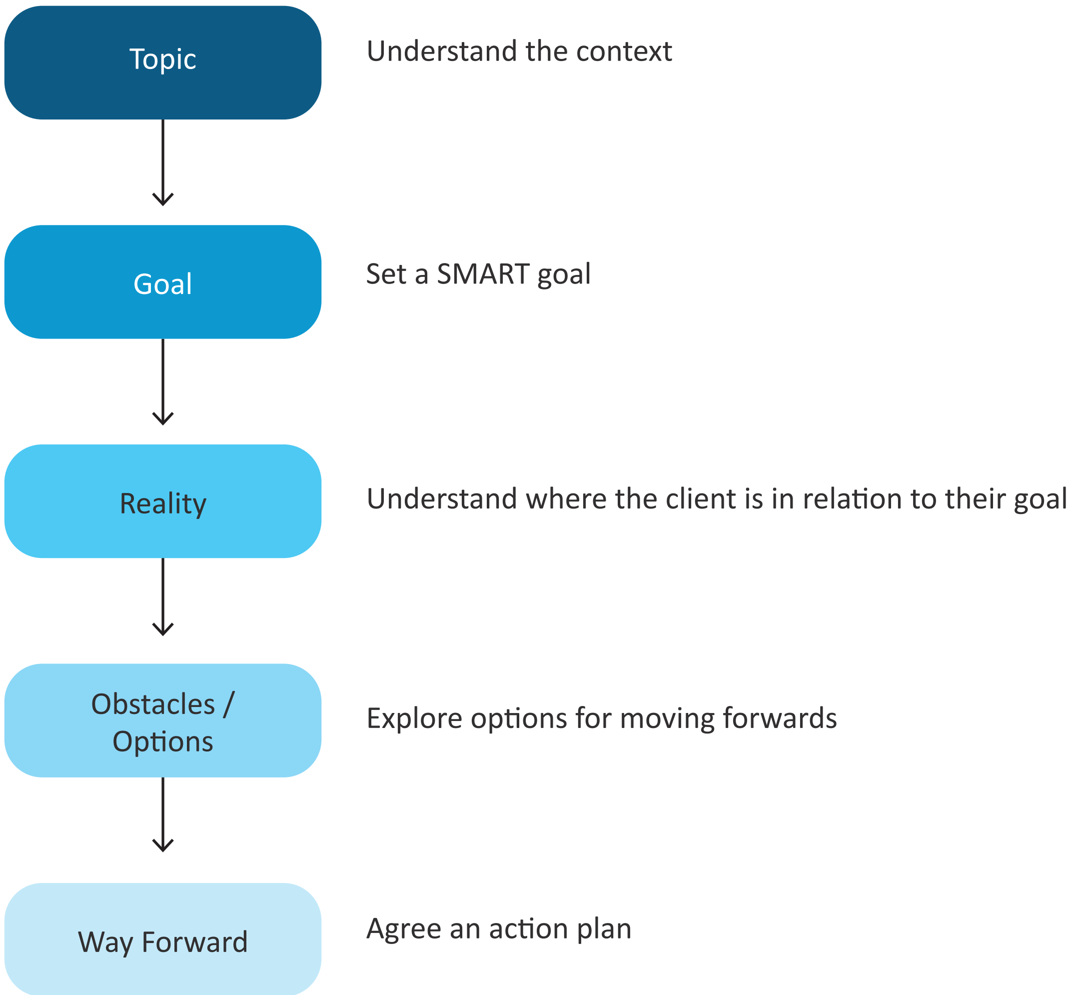


Diagram S3-1: The stages of TGROW

Benefits of TGROW model

The TGROW model is easy to understand and straightforward to apply. It is well suited to situations where the client is struggling to identify a way forward, but is keen to find one.

Each coaching session must have a goal that is measurable and specific. This helps the client move from their current reality towards their goal.

The TGROW model need not always be used sequentially, and stages may be revised several times during a coaching session or process. The version described here has a double meaning for the ‘O’ stage: Obstacles and Options.

How to use the TGROW model

To structure a coaching session using the TGROW model, follow the below steps, which include sample questions you can use to help your client.

Stage	Description
Topic	**Understand the context of the issue and the wider environment.** Topic takes place at the start of the coaching conversation and enables the coach to understand the 'context' of the issue and the wider environment the business is operating in. Understanding this facilitates a greater level of comprehension around the client's goal and why it is important to them / their business.
Typical questions:	• What area or area would you like to talk about? • What is important to you? • What areas do you want to address? • What is behind this? • What does this mean to you?
Goal	**The endpoint that the client wants to achieve.** The objectives of the goal stage are to agree the discussion topic and specific objectives for the session. If appropriate, this is also where a long-term goal or aim can be set. You and your client need to identify the behaviour/situation they want to change, and structure this as a SMART goal: one that is specific, measurable, attainable, realistic and time-bound.
Typical questions:	• What would you like to achieve in this session? • What difference would you like to see on leaving this session? • Do we have sufficient time available for you to attain this? • How will you know that you have achieved this goal? • Does this goal fit with the overall business objectives? • Does this goal conflict with any other goals or objectives?

<table>
<tr><th>Stage</th><th>Description</th></tr>
<tr><td>Reality</td><td>Understanding where the client is now in relation to their goals.

In order to understand how far a client is away from their goal, it is essential to understand their current reality before attempting to make changes. Look closely and try to get a full picture without missing any information.

Invite your client to self-assess the topic and present situation. Remember to check their assumptions for validity and disregard irrelevant assumptions and history.</td></tr>
<tr><td>Typical questions:</td><td>• What is happening now (what, who, when, and how often)? What is the effect or result of this?
• How do you know this is accurate?
• Have you already taken any steps towards your goal?
• What are the other relevant factors?</td></tr>
<tr><td>Obstacles & Options</td><td>Exploring options for moving forward.

This stage has two steps. The first, obstacles, is for your client to identify what is standing in the way of achieving their goal. There may be multiple obstacles of different types such as people, resources, environment. Ask probing questions to help your client think deeply.

The second step is to assess the full range of options available. Invite suggestions from the client, brainstorm and discuss as many good options as possible. At this stage you can offer suggestions carefully, bearing in mind that in a coaching relationship it should be the client who makes the option choices. Let the client do most of the talking and guide them, without making decisions for them.</td></tr>
<tr><td rowspan="2">Typical questions:</td><td>Obstacles:
• What do you need to stop doing in order to achieve this goal?
• What obstacles stand in your way?
• What if this constraint were removed? Would that change things?
• What personal changes do you need to make to achieve this goal?
• What is preventing you from changing?
• Do any of your skills / attitudes / behaviours (etc.) contribute to this situation?</td></tr>
<tr><td>Options:
• What alternatives are there to the current approach?
• What suggestions do you have?
• What do you need to start doing in order to achieve this goal?
• Who might be able to help you?
• What are the advantages and disadvantages of each option?
• What factors or considerations will you use to weigh the options?
• Do you have a preferred option that you'd like to act on?</td></tr>
</table>

Stage	Description
Way Forward	**An action plan is devised detailing the steps required to meet their goal.** By this stage, (sometimes referred to as Wrap Up/ Will), your client should have developed a good idea of how they can achieve their goal. It's time to agree to specific actions that will move them towards their goal and on a date to review progress. This is important to provide accountability, and an opportunity to change approach if this original plan is not successful.
Typical questions:	• What will you do now? What else will you do? • What could prevent you from moving forward? How can you overcome this? • How can you keep your motivation high? • How often do you need to review progress?

The addition of the Topic stage to the GROW model creates an opportunity to identify issues different from those the client initially intended to bring up. It also creates a strong foundation on which to set relevant goals.

For example:

Your client is a hotel business near Anuradhapura. Customers have come to expect a high standard of accommodation and food, but cleaning is not being carried out well enough, leading to complaints from customers. In this situation:

- The **Topic** is customer service
- The **Goal** could be to reduce the number of complaints by half within a month

During the topic stage, you can learn valuable information about the business environment and why this goal is important to the client. For example, the manager's bonus may be linked to the number of negative reviews about the hotel online. Knowing this gives you important information about the client's motivation to pursue change.

What are SMART Goals?

SMART goals are:

- **Specific**: must be well defined, clear and unambiguous (who, what, when, where, why?)
- **Measurable**: must have specific criteria that measures progress to the goal
- **Achievable**: must be within the individual's ability and skill to attain, often it can be a stretch to feel challenging, but not impossible
- **Realistic**: must be realistic within the available resources and time, and relevant to success in a specific area.
- **Time-bound**: must have a clearly defined time-frame including start and target date.

Example A: SMART goal
"Within a month, I am going to get my guest house set up on 3 different OTAs, which will allow me to benefit financially from my spare rooms. Within six weeks, I will get at least one booking per week from each of the OTAs."

Example B: SMART goal
"In order to establish myself as a tour guide, I am going to set up a facebook page, print 50 business cards and inform 10 local hotels of my services. Within one month I will aim to do two tours a week, building relationships and my brand through word of mouth, online referrals and local networking."

Example C: a non-SMART goal
"I will open a second guest house in another town by the end of this year."
This goal is measurable and time-bound, but it isn't specific. Where? In which town? Or at least, how will the person research this? (Without knowing more information on the situation, we can't say if it is realistic or achievable).

OSKAR Model

This model was developed by Paul Z. Jackson and Mark McKergow and described in their 2002 book 'The Solutions Focus, Making Coaching and Change SIMPLE'. The OSKAR model is a solutions-focussed model, meaning it is focussed on finding what works, not on identifying problems. It helps the client move away from placing attention on problems, to focussing on solutions, through the use of questions.

Outcome	What is the objective of the coaching?
Scaling	On a scale of 0 to 10, where are you (n) today?
Know-how	What helps you perform at n on the scale?
Affirm and Action	What's already going well? What's the next step?
Review	What's improved?

Diagram S3-2: The stages of OSKAR

Benefits of OSKAR model

When coaching, it is easy to spend a lot of time talking about problems and their causes, but time spent on this is time not spent on finding solutions. Rather than discussing difficulties, the OSKAR model asks what the client wants to change, not what their problems are. This model explores:

- Desired goals
- Experiences that have led to success in the past (when problems did not occur)
- Solutions (the changes that will have occurred once the goal is reached)
- Existing resources

The heart of this model involves:

1. Finding what works and doing more of it
2. Finding what doesn't work and doing something else

How to use the OSKAR model

To structure a coaching session using the OSKAR model, follow the below steps, which include sample questions you can use to help your client:

Stage	Description
Outcome	**What is the objective of the coaching?** The Outcome stage of the OSKAR model is more than the SMART 'goal' of the GROW model. It is the outcome that the client (and those around them) want to see as a result of the coaching. The outcome stage establishes the platform that the coaching will be built on. It clarifies: • What the client wants to achieve (long, medium, and short term) • What they want to achieve from the session itself • How they will know it has been useful to them • The perfect scenario desired by the client During this stage, try to help the client to visualise their desired outcomes. The discussion can go beyond results, to include the small, tangible signs that progress is starting to happen.
Typical questions:	• I want you to imagine that you have attained your goal. What changes do you see in your working environment? What does it look like? What does it feel like? • You've come into work today to find that this problem has vanished. What changes have occurred? • What do you want to achieve? • Are there times when the solution is already present, or something similar? Can you identify what is different about these times?
Scaling	**On a scale of 0 to 10, where are you (N) on that scale today?** The client rates themselves on a scale of zero to ten (where 10 is their desired outcome, and zero is the complete opposite). This creates a sense of objectivity and raises the client's awareness of their own situation. Both you and your client will gain awareness of how the current situation is working and this becomes the starting point for change. When using this scale, clients rarely give a zero rating, showing that often some (limited) progress is being made towards the outcome, even at the beginning of the coaching process.

<table>
<tr><th>Stage</th><th>Description</th></tr>
<tr><td>Typical questions:</td><td>
- On a scale of 0 to 10, with 0 representing the worst it has ever been and 10 the preferred future, where would you put the situation today?
- If 0 is no achievement and 10 is complete goal achievement, where are you on the scale already?
- You are at “N” now; what did you do to get this far?
- How would you know you had got to N+1?
</td></tr>
<tr><td>Know-how</td><td>
What helps you perform at N on the scale?

During this stage you want to gather as much information as possible about the factors that have brought the client to their current level. What are their strengths? What is the context? The focus is on what works (or has worked) rather than what isn’t working (or won’t work).

During this stage, the coach helps the client gain awareness of available resources and build confidence in their skills, experience and abilities to make the desired transition. The search for know-how may be extended to include other relevant people, teams, stakeholders etc.
</td></tr>
<tr><td>Typical questions:</td><td>
- What are your strengths?
- What helps you perform at “N” on the scale, rather than 0?
- What knowledge do you currently have that is helping you?
- What resources do you have?
- What skills do you currently have that are helping you?
- What attitudes do you currently have that are helping you?
- When does the outcome already happen for you - even a little bit?
- What did you do to make that happen? How did you do that?
</td></tr>
<tr><td>Affirm & Action</td><td>
What’s already going well? What is the next step?

This stage has two steps. The first, Affirm, is where the coach provides positive reinforcement to the client by reflecting back positive comments about their strengths, knowledge, skills and attitudes revealed in the know-how stage. This helps build the client’s self-belief as well as enhancing your coaching relationship.

Typical phrases include:
- So your knowledge of “X” is extensive and has enabled …
- Reacting to the situation in the way you describe was excellent because …
- The level of skills within your team is much higher than others I’ve seen in this situation.

The second step, Action, is where your client determines the actions they will take to move towards the outcome. This includes doing more of the things identified as working, and making changes, or doing less of, the things that aren’t working.
</td></tr>
</table>

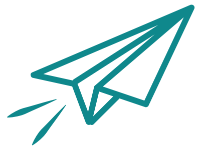
Stage	Description
Typical questions:	• How can you use these resources and strengths to help you achieve your goal? • Will keeping that successful process in place help you complete that action? • What did you do to get this far? • How can you do more of that? • Do you think altering the current procedure has any additional benefits?
Review	**What's improved?** The final stage of the OSKAR model takes place at the beginning of the next coaching session. The progress made is reviewed against the desired outcome. The focus is on what is better, rather than whether or not a particular action was carried out. This keeps the focus on positive steps forward. This is the last stage of the model, however the cycle returns to the start and the client and coach can consider what the next outcome is. During the review, you may revisit the scale, asking what the new rating is and what has driven this improvement. Ensure the emphasis remains on the positive.
Typical questions:	• What is better? • Have your actions moved you towards your goal? How? • What did you do that made the change successful? • What do you think will change next? • Are you still motivated to take the action(s)

Remember

The OSKAR coaching model is a framework to help coaching sessions focus on solutions. It doesn't mean you avoid discussing the problem, but it does mean you focus on finding a solution.

Comparing TGROW and OSKAR:

	TGROW	OSKAR
Focus on:	Identifying obstacles and overcoming them	Solutions, not on analysing problems
Begins with:	Identifying a clear goal	Identifying what the client wants to be different
Is concerned with:	The reality of the client's current situation	What could be possible
Approach:	Way forward is based on progress from the current reality	If something works, keep doing it, if something doesn't work, stop doing it
Asks about:	Relevant difficulties	Relevant improvements
Process:	Describes problems and looks for explanations	Emphasis on progress and positive achievement
Particularly suited to:	Situations where the client struggles to identify a way forward, but has high motivation to find one.	Situations when the client is aware of the outcome they want, but it is something difficult to achieve.



Tip

An effective way to practice using both types of coaching approaches and to appreciate their differences is to use them to address your own personal issues. By learning to get yourself "unstuck," you'll learn how to ask the most helpful questions. Record some questions as prompts to use in coaching sessions.

The Blended Coaching Model

The Blended Coaching model takes a holistic approach towards engagement, learning, development and exposure.

In this model, the business coach works with the client to implement proven best-practice systems, strategies and actions that will grow the business. External factors that restrain business growth are considered as well as in-house business constraints such as skills gaps.

Measurements of business performance are used to identify areas that require attention and to track progress. The model also uses tools, techniques and evaluation methods to help clients experience a mindset shift, rethinking their organisational objectives and processes to reach their definition of success.

Benefits of the Blended Coaching model

Benefits of using the Blended Coaching model include progressively enhanced business performance, addition of value added services to increase income and cost cutting capabilities.

Timescale	Benefits for business coaching clients
Short term	• Increased knowledge and awareness of industry standards • Understanding of skills gaps that need addressing • Change and development begins • Clients become better able to communicate their needs and vision
Medium term	• Introduction of value add services at higher price points • Increased service quality • Goals are achieved and revised • Industry networks develop and strengthen
Long term	• MSMEs enter the formal economy • Improved performance, products and processes • Increased profitability • Increased income for business owners and the sector value chain • Trickle down benefits to employees and the wider community

How to use the Blended Coaching Model

Unlike TGROW and OSKAR, the Blended Coaching model does not require the client to have a clear goal in mind when coaching starts. The model begins with an evaluation of the current business performance. This is used to help the client understand their business challenges and identify key improvement areas.

In partnership, the business coach and client build a specific action plan based on this information. The action plan lists priorities within key business improvement areas such as product development, marketing and operations. Success is measured in terms of achievement of agreed actions and results.

During regular coaching meetings, progress is reviewed against the action plan with the assistance of performance measurement tools. Coaches also assist clients to identify and address skills gaps to achieve improvements.

The Blended Coaching model begins with an evaluation of the business. It then moves on to design goals and identify an action plan to achieve them. The stages include:

1. **Conduct operational performance evaluation to understand the client's business.**
   Business coaches assist clients to:
   - Identify which stage of development the organisation is at currently
   - Understand challenges, including the gaps in skills and processes that hinder growth
   - Identify key improvement areas
   - Collaboratively adopt goals

2. **Agree goals and measurement tools** that will be used to monitor performance.
   Create an action plan to achieve specified desired results.

3. **Ongoing performance monitoring and feedback** to help clients achieve their goals. This takes place in regular coaching sessions and includes:
   - KPI tracking, performance monitoring and evaluation
   - Feedback
   - Identification of gaps and skills needs
   - Supporting the client to access other business development services e.g. training
   - Creation of value add and expanded business services
   - Updates to the action plan as actions are achieved or revisions are required

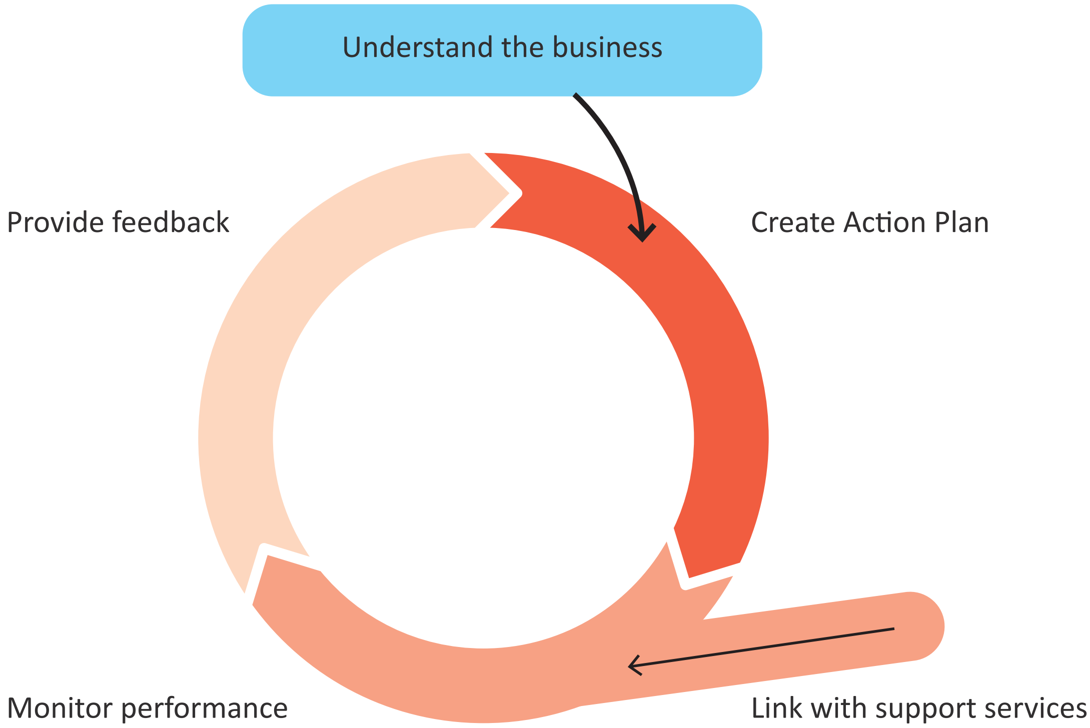
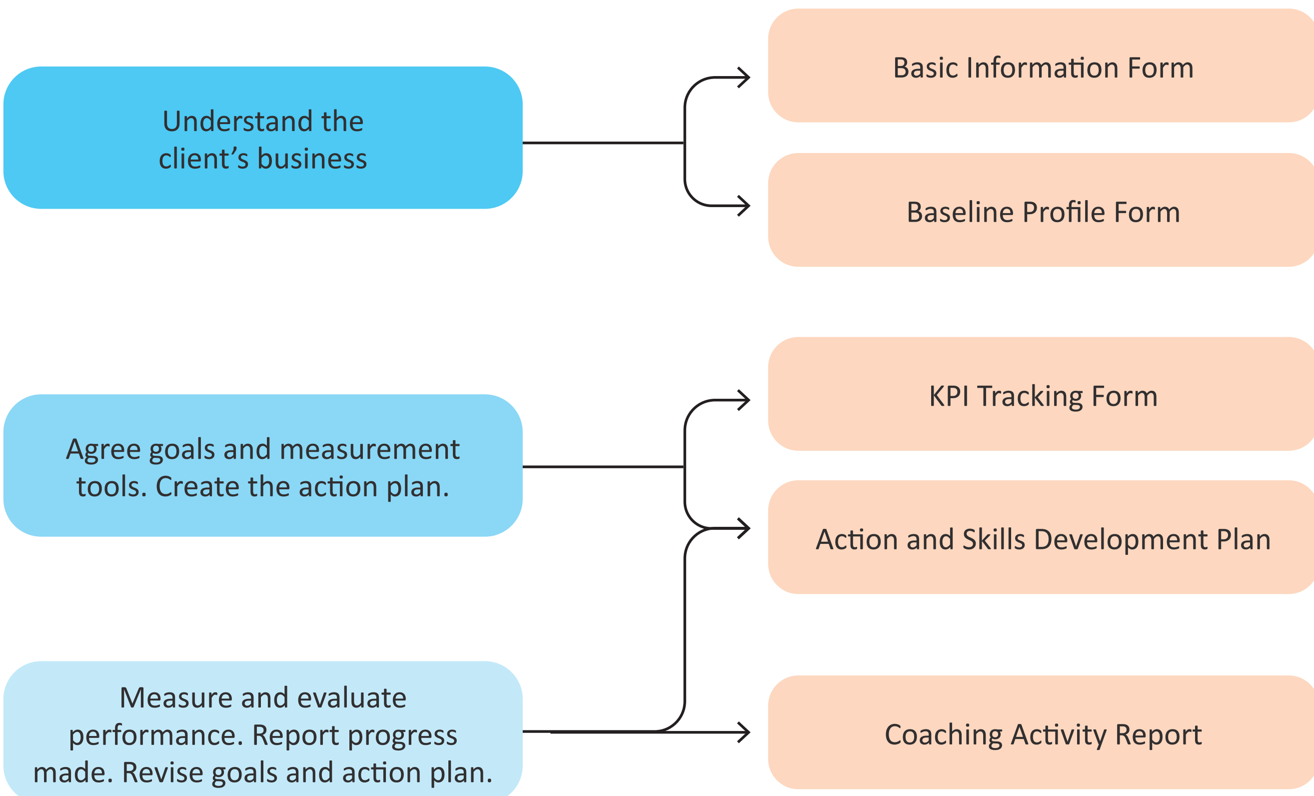


Diagram S3-3:The stages of Blended Coaching

Blended Coaching Forms

The Toolkit contains five templates for the blended coaching process. These are designed to provide a practical structure to support your coaching. Remember that flexibility is important in coaching, feel free to adapt these templates to your requirements.



Understanding Your Client's Business

The first stage in the Blended Coaching model is to get a true understanding of your client's business. This includes identifying which stage of development the organisation is at and taking key measurements and indicators of performance.

Through the evaluation, coaches assist the client to understand their business challenges and identify key improvement areas. Once you and your client have this information, you can move on to identify key improvement areas, set goals and build an action plan.

There are two template forms in the toolkit for understanding your client's business: the Basic Information Form and the Baseline Profile Form. Both should be completed in collaboration with your client.

The Basic Information Form

This form is used to gather basic information about your client and their business. It is the starting point for understanding who they are and what they do. The form is in two parts:

Part one includes:

A. Client details (name, contact information)

B. Business details (name, address registration information)

C. Business profile (type of business, size, customer information)

D. Staffing and skills data (how many employees, training information)

Part one should be filled in during the first coaching session. This information should be simple to gather and the straightforward questions are useful to begin building the coach-client relationship.

Part two
This section is for the coach to research, mostly online and can be done before the first session takes place. It focuses on publicly available information about the business, including their website, social media and review sites.

In the case of a startup, there may be no information to fill in here. For operational businesses, this is the coach's first chance to ascertain how the business is perceived. The findings should be shared with the client as early as possible in the coaching relationship, and can be adjusted as a result.

The next page shows the Basic Information Form.

Basic Information Form: Part One

Part one of this form should be completed by the coach in their first session with a new client.

A. Client Details

1. Full name of the client	
2. Designation (please specify)	
3. Email	
4. Mobile Number	
5. Landline	
6. NIC No	

Factual information about your client, and how you can contact them.

Use passport number for foreigners

B. Basic Business Information

7. Name:				
8. Address:				
9. Legal status:	Registered	✔	Not registered	
10. Details of registration	**Institution**		**Location**	**Registration No.**
	Divisional Secretariat Office			
	Pradeshiya Saba (Trade licence)			
	Sri Lanka Tourism Development Authority (SLTDA)			
	Registrar of companies			

Tick if the business has the registration and record the details. If not, place a cross.

This section is to record information that the client tells you about the business, including what they do, who their customers are and the scale of the operations. Keep in mind that more data will be gathered about this and recorded in the Baseline Profile Form.

C. Business Profile

11. Type of business (brief description of business type and activity, and period of operation)

12. Size of business (multiple locations? Number of units such as rooms, jeeps? Turnover?)

13. Customer profile (local/overseas/mixture? Numbers per week/month/year?)

D. Staffing and Skills Data

14. How many people are currently employed? (enter numbers)

Family members				Full time staff				Part time staff			
Male		Female		Male		Female		Male		Female	

Record here any changes in staffing, such as additional temporary hires during peak season, weekend staff at a restaurant. Include information on whether staff are full or part time where relevant.

C. Business Profile

15. Is this the normal staffing level, or are there more/fewer staff at different times of year?

16. Does the business employ any people with disabilities?

Yes		No	

If yes, provide details below

17. Do employees come from a variety of communities? (Sinhalese, Tamil, Muslim, Burgher, other)

Skills development training could be formal programs, such as completing a training course (in person or online) or in-house workshops to improve staff skills. Where relevant, record details of the training provider, how many staff attended and when. The same applies for the client themselves in question 19.

18. Have the employees participated in any skills development training in the last 4 years?

Yes		No	

If yes, list the training

Type of training	Institution providing training	Number of employees	Year of training
1.			
2.			
3.			
4.			
5.			

19. Has the client participated in any skill development training in the last 4 years?

Yes		No	

If yes, list the training

Type of training	Institution providing training	Number of employees	Year of training
1.			
2.			
3.			
4.			
5.			

Basic Information Form: Part Two

This section is for the coach to research.

This section is for the coach to research, mostly online. In the case of a startup, there may be no information to fill in here. For operational businesses, this is the coach's first chance to ascertain how the business is perceived. The findings should be shared with the client as early as possible in the coaching relationship, and can be adjusted as a result.

1. Does the business have its own website? If yes, comment on how attractive it is, how informative, and how easy to navigate.

2. Does the business have a presence on third party sites such as Tripadvisor, Booking.com, Google (including Google Maps)? If yes, mention which sites and how easy it is to find.

3. Is there any online feedback on the business in any of the above sites? Summarise the feedback.

The Baseline Profile Form

This form is a deep-dive tool to assess your client's business performance across key performance metrics. Once you understand the basics, you can move onto this more detailed assessment.

The form should be used in the first coaching session, for you and your client to get a clear picture of their business. It can also be used any time you want to do a full evaluation of the business. This could be:

- Towards the end of the coaching journey to demonstrate progress made
- Intermittently if you are coaching the client over an extended number of months
- Any time the action plan needs significant updates

The form is based around key performance indicators (KPIs) that measure aspects of the business. For example, KPIs for hotel business include average room rate, occupancy, staff performance and levels of training, waste management, effectiveness of reservation systems etc.

An example of a completed Baseline Profile Form is given later in this section.

Key Performance Indicators

Key performance indicators (KPIs) are metrics used to measure, track and evaluate step by step performance of a business. They provide a shared set of guidelines by which the coach and client can assess the current situation and the progress that needs to be made.

KPIs will vary from business to business, but all businesses have them. Examples of KPIs include:

For a hotel: average length of stay, guest spend in the restaurant, number of booking through OTAs like booking.com.

For a surf club: number of students in a group surf class, number of one-on-one lessons booked, average time for surf board rental.

For a beauty salon: number of advance bookings, number of walk in customers, average spend per customer.

Why are KPIs important?

KPIs measure the performance of a business over time. They show where the business is now, and how things change - hopefully for the better. Carefully selected KPIs provide a progressive development blueprint and can be set for any type of focus area.

KPIs are first used to understand the current state of your client's business. For example, are they registered with the SLTDA? How many staff do they have? What is the monthly profit?

KPIs are then used to monitor the ongoing performance of your client's business. For example, the number of bookings for a guided nature tour per week.

Using KPIs to monitor ongoing performance

As a coach you can collaborate with your client to select the most appropriate KPIs for their business. In the first coaching session, you will identify the KPIs that will be monitored. This becomes the baseline. In each subsequent coaching session, you will update the ratings for the KPIs and use this information to evaluate progress.

The KPI appraisal will help you identify areas for improvement, prioritise areas that can rapidly improve the business performance and highlight topics that require training and development.

This handbook section introduces KPIs and covers how to use them to understand the realities of a business. Section 8: Measuring Business Performance covers how to use KPIs as ongoing measurement tools.

Selecting KPIs

KPIs help you understand the current situation for your client and their business. To get a clear picture of the business, coaches should use discovery skills including:

1. **Observing**: assess the situation by looking at the environment - what is the layout, storage for goods, risk of accidents, behaviour of employees etc.

2. **Questioning and listening**: obtaining information from your client and other employees / stakeholders. Motivating speakers to talk more and divulge all the relevant information.

3. **Data collection**: Using surveys and questionnaires to get information from many individuals - such as customers of a restaurant, or guests on a tour.

4. **Data analysis and review**: looking deeper at data and examining it to get insights

In the Blended Coaching model, under the umbrella of KPIs we find Operational Performance Indicators (OPIs) and Business and Employment Indicators (BEIs). OPIs cover areas such as product, marketing, operations and systems. BEIs cover business and employment areas.

Operational Performance Indicators (OPIs)

OPIs measure factors concerned with business operations, such as the marketing, how well trained the staff are and the standard of the product / service. They are the basis for business situational analysis.

Each type of business will have different OPIs. Typical OPIs include:

1. **Product:** quality standards, facilities, maintenance, health and safety
2. **Marketing:** business cards, photos / video, online presence, website performance
3. **Operations / System:** customer service, staff performance, efficiency, accounting, reservations, storage of personal data
4. **Human Resource Management:** inclusivity of recruiting, workforce planning, on the job training, promotions
5. **Environmental Sustainability:** waste management and climate change adaptations

Certain business types may have other suggested OPIs. For example, accommodation business include:

- **Site and building:** quality standards (e.g. in a bathroom: water, toilet & shower, size and comfort), accessibility for persons with disabilities
- **Food and service:** kitchen facilities, hygiene, organisation, cleanliness, food quality and authenticity

How to score OPIs

Each indicator is scored against a standardised scale, with 5 being the best. OPIs are evaluated through site inspection, interviews and document review. Business coaches must use their discovery skills to obtain the information, then give a rating for each indicator.

0 = not applicable	2 = progressive	4 = good
1 = basic	3 = standard	5 = very good

Because OPIs are subjective, not numerical, coaches must use their informed judgement when assessing the rank of a business against OPIs.

A database of guidelines has been prepared to help you. The following table shows example guidelines for two accommodation OPIs under marketing and operations.

Example OPI guidelines for an accommodation business		
Rank on the 0-5 scale	**Marketing - Planning** Written business plan, budget, product concept, development strategy.	**Operations - Staff performance** Quality of guest relations, housekeeping, level of hygiene, grooming and uniform, level of training and knowledge.
0 Not applicable	Not applicable.	Not operating.
1 Basic	Vague idea, nothing in writing.	Not qualified, poor english / language skills, bad customer service.
2 Progressive	Clear ideas of what to do, but not nothing written down or recorded.	Basic service levels but quality and hygiene are still minimal.
3 Standard	Basic concept plan or business plan partially implemented.	Basic services are covered professionally.
4 Good	Implemented business plan.	Good communication skills and customer service. Staff are knowledgeable, professional and have good hygiene and uniforms.
5 Very good	Concept plan, business plan and budget fully implemented.	Exceptional communication skills and customer service, perfect grooming and hygiene, highly knowledgeable.

OPI Example

Operational Performance Indicator	Description	Baseline
Product		
Quality standards - reception / dining	Size, view, first impression decoration, cleanliness	3
Level of maintenance	Site and buildings (including gardening)	3
Marketing		
Advertising and web performance	National websites, TripAdvisor, own website, facebook, product description, professionalism	1
Marketing materials	Brochure, business cards, photos / videos, guest book, product description, professionalism	1
Operations / Systems		
Human resource management & training	Diversity and inclusive employment, part-time jobs, flexible roster, seasonality adjustment, on the job training, internal promotions	2
Human Resource Management		
Customer service level	Tour desk / tour book, internet access, foreign language communication, transport, front office, daily housekeeping, laundry service	3
Food and Services		
Kitchen facilities and hygiene	Stove, fridges and freezers, organisation, storage, hygiene	4

In the above example, the business is doing okay in customer service and facilities, and well in kitchen hygiene. However, marketing materials (score: 1) and HR management & training (score: 2) are areas that need to be improved. These would become key focus areas for the business coaching.

Sometimes, the example OPI may be suitable for the needs of your client. Other times you may want to adapt it to be more relevant or effective. Feel free to make changes to the guideline OPIs to suit your needs.

Guidelines for the OPI rankings for tourism businesses including accommodation providers, tour guides, food products and water activities will be provided to you.

These are indicative guidelines only. Coaches must use their judgement to create a scale for ranking that is suitable for the unique needs of each client's business.

Business and Employment Indicators (BEIs)

BEIs measure business and employment factors. Business factors include tourist board registration, financial accounts and productivity. Employment factors include the number of employees, the diversity and inclusivity of the workforce, and how many employees have skills qualifications.

The measurements for BEIs may be a Yes / No choice (is the business registered with SLTDA?), or a numerical value (how many female employees are there?).

Some BEIs are reports on trends over time (e.g. visitors over a month, average length of stay) and are given a quantitative value or percentage. Some are sector related, such as rankings on OTAs like Booking.com and Tripadvisor.

The baseline BEIs will often lead to the drafting of business-specific KPIs to investigate aspects of business performance.

BEI Examples

Operational Performance Indicator	Description	Answer
Business		
Business license	Do they have any type of business registration?	Yes
Bank account	Do they have a bank account?	Yes
SLTDA registration	Are they registered with the SLTDA?	No
Tripadvisor rating	Score out of 5:	2.2
Number of guests	Per quarter:	25
Expenses per quarter	(materials, transport, employees etc): LKR	380,000
Distribution channels	How many OTAs, travel agents etc. distribute the product:	3
Employment		
Employees (male)	Number:	3
Employees (female)	Number:	1
Living with disabilities	Number of male employees with disabilities:	1
Living with disabilities	Number of female employees with disabilities:	0
Skills certificates	Number of male employees with certificates:	1
Skills certificates	Number of female employees with certificates:	0

Using BEIs

Unlike with OPIs where each indicator is given a ranking showing the performance (0-5), in BEIs the areas for improvement will depend on progress over time.

If on the second coaching visit the Tripadvisor rating has gone from 2 to 3, this would show improvement. If the number of guests per quarter has decreased from 25 to 12, this would be a cause for concern and the business coach would work with the client to explore further.

If your client's business is very informal, it may be more difficult to collate the information needed for these BEIs. Enabling and educating your client on what data to collect and how, is part of the role of business coach.

In the short term, you can adapt the KPIs you track to take into account the lower accuracy / availability of information. This could involve combining several individual KPIs into a broader topic, or using less accurate information than you would ideally choose to.

While this is okay as a short term solution, you should encourage your clients to improve their record keeping and connect them with support services who can help them, for example by training them on financial planning and accounting.

Enabling and educating your client on what data to collect and how, is part of the role of business coach.

Remember

It is important to probe the current reality with a client, and not simply accept what they think are areas to work on, to increase opportunity or to solve a problem. It is possible that your client believes X is the problem, when really it is Y. One benefit of the blended coaching model, is that by getting a clear understanding of the business situation first, you can focus coaching on the right areas.

For example, the owner of a homestay wanted to increase his room rates from Rs 2,000 to Rs 4,000. He asked a business coach to help him market the rooms for the new price. Using the blended coaching model, the coach gathered lots of information on the client's business. This data collection showed that on Tripadvisor, he was only receiving a score of just 2 out of 5 for his rooms. If he increased the price further, guests would be even more dissatisfied.

The client wanted help with marketing, but after reviewing the data, the coach realised that the product - the rooms - was the problem. Using the data the coach shared this with the client, and together they set goals to improve the standard of the rooms.

As you make an assessment of the current state of your client's business, you can fill in the information on the Baseline Profile Form.

Recording KPIs

The KPIs (BEI and OPI) information from your first coaching session should be recorded in the Baseline Profile Form. There should be agreement between you and your client on the information that is recorded in this form. It serves as the baseline from which updates will indicate changes in the profile and performance of the business.

This form allows you and your client to review the data objectively and identify areas for focus and action. This data forms the basis of the action plan.

The action plan will not include all the KPIs from the Baseline Profile Form, only the ones that you and your client agree to track and monitor. In subsequent coaching sessions, progress on these KPIs will be recorded in the KPI Tracking Form. How to do this will be covered in Section 8: Monitoring Business Performance.

When completing the template Baseline Profile Form you have the option of using OPIs and BEIs as well as adding in other KPIs that you think are relevant. The template form includes sub headings of the key OPI and BEI areas. It is good practice to have content under all of them, but you do not need to use the exact OPI and BEIs provided as guidelines.

The next page shows an example of a completed Baseline Profile Form for a guesthouse. Note, this is a mini-version of the form and does not include all possible rows.

Remember

OPIs and BEIs are just two types of KPIs. They provide a framework you can follow but you can also create your own KPIs that are tailored to your client's business, especially as you become more experienced as a coach.

Baseline Profile Form

Operational Performance Indicators (OPIs)

OPIs measure factors concerned with business operations, such as the marketing, how well trained the staff are and the standard of the product / service. They are scored on a ranking of 0 (not applicable) to 5 (very good)

OPI	Description	Coaching Session Number:		
		One (baseline)	Two: 1 April	----------
Product				
Quality standards - Bathroom	Bath / shower, free floor space, towels provided, quality of fixtures and fittings, cleanliness, hot water, shower curtain / cubicle, bathroom amenities	2	4	
Marketing				
Marketing - Planning	Written business plan, budget, product concept, development strategy	1	2	
Operations / Systems				
Reservation system	Organisation of files, books, ledgers, reservation software, accuracy of booking, quality of information calculating occupancy ratio, reservation staff	2	3	
Human Resource Management				
Staff performance	Quality of guest relations, housekeeping performance, staff performance, grooming and uniform, level of training and motivation	3	3	
Environmental Sustainability				
Waste Management Plan	Garbage separation, composting, safe disposal of refuse	1	2	
Other				

Product refers to the goods or service that the business is selling. For example, in an accommodation business the product would be the rooms (including common areas, reception etc.). In a restaurant the product would be the food, as well as the physical building and facilities.

The form has columns to record the information on three occasions. The first should be completed in the first coaching session to give the baseline that KPIs and the action plan are developed from.

Marketing refers to how the business is promoted, including print / digital / tv / radio. It includes planning, execution, strategy and concept.

Operation / system refers to how the business is run. This includes reservations, accounting, work planning, equipment etc.

Human Resource Management includes the employees, training, performance, compensation and benefits etc.

Environmental Sustainability includes actions taken on waste management and practices around water and energy conservation.

Other is a space for you to add additional metrics that are relevant for your client. Although the template form only has one line per sub-heading, you can add as many as you need.

Business and Employment Indicators (BEIs)

BEIs measure business and employment factors. Answers may be a yes/no choice, or a numerical value. It is often these that will lead to the drafting of business-specific KPIs to investigate aspects of business performance.

The measurements for BEIs may be a Yes / No choice (is the business registered with SLTDA?), or a numerical value (how many female employees are there?). Some are reports on trends over time and are given a quantitative value or percentage. It is often these that will lead to the drafting of business-specific KPIs to investigate aspects of business performance.

This section includes information on the business administration, including registration, bank accounts and ratings from review sites.

Business activity includes information on what the business does, productivity and financial activity. This can be broken down into core business and non-core business, for example, at a beauty salon core business would be in-house treatments, non-core business would be products sold to clients to take home.

Employment includes information on the number of staff, diversity and inclusion and skills levels.

Business / Employment Indicat	Description	One (baseline)	Two: 1 April	-------
Business Set Up & Profile:				
Business license	Does the business have any type of business registration? Yes / No	Yes	Yes	
Bank account	Does the business have a bank account? Yes / No	Yes	Yes	
SLTDA registration	Is the business registered with the SLTDA? Yes / No	No	No	
Tripadvisor rating	Score out of 5:	2.7	3.1	
Business Activity:				
Distribution channels	How many OTAs, travel agents etc. distribute the product:	1	3	
Sales level	Number of units sold per quarter (room nights/ tours/meals/etc.)[1]	16	20	
Expenses per quarter	(materials, transport, employees etc): LKR	200,000	250,000	
Employment				
Employees (male)	Number:	3	2	
Employees (female)	Number:	0	0	
Skills certificates	Number of male employees with certificates:	1	1	
Skills certificates	Number of female employees with certificates:	0	0	

Business Life Cycle

Based on the information gathered, you can identify where the business is in the business life cycle. This information will help you decide on the focus areas for coaching.

Based on all the information gathered in both parts of this form, and the information in the Basic Information Form, the business appears to be at which stage in the Business Life Cycle? Tick the box you and your client agree on.

	One (baseline	Two: 1 April 2021	-----------------
Concept			
Start-up	✔	✔	
Growth			
Maturity			
Renewal			
Decline			

Sign off

Both client and coach should sign the form. It is important that you both agree the information gathered is accurate as it will form the baseline that performance metrics are compared against.

This form is agreed between client and coach. The coach pledges not to reveal any financial or other business information learned during the course of the coaching.

____ ____

Client name and signature

Coach name and signature

Adapting KPIs

There are sets of OPIs and BEIs already produced that you can use with various different types of businesses. However, sometimes, you may need to adapt them to suit the needs of your client.

Example A: Adapting an OPI

The OPI below is designed for water-based activity business. It refers to canoes and kayaks. Imagine you have a client who operates a surf school. You can't use this OPI exactly, but you can adapt it. The guidelines for OPI ranking are shown from 0 (not applicable) to 5 (very good)

Original OPI		Adapted OPI for surf school
Canoes and kayaks: inflatable or made out of a solid material and should be made according to international specifications.		**Surf boards:** in good condition and made according to international specifications.
0	Not applicable / no models	Not applicable / no surf boards
1	Unaccepted models or poor or low quality	Unaccepted models or poor or low quality
2	Accepted models. 2-3 kayaks	Accepted models. 1-3 surf boards
3	Accepted models. 5-10 kayaks	Accepted models. 5+ surfboards
4	Accepted models. 10+ kayaks & canoes	Accepted models. 5+ surfboards with different lengths, mix of hard and soft boards
5	International Quality Standards and stored according to manufacturer's requirements	5+ surfboards with different lengths, mix of hard and soft boardsInternational Quality Standards and stored according to manufacturer's requirements

The KPIs can be adjusted for different business types and sizes. For example, if your client is a large surf school operation with 10+ surfboards, and the potential to expand to provide a service to a nearby 5 star hotel then you would need to adjust the number of surf boards expected. If they run classes for up to 8 students, then 10 surf boards should be the minimum, to allow for 2 to be damaged / out of service at any one time.

Example B: Adapting a BEI
Imagine your client owns a 12 room hotel near Trincomalee. Although there are business travellers all year round, the tourist market is important to this business but highly seasonal. Quarter 1 (Jan-March) is always his quietest quarter.

A guideline BEI for accommodation businesses is: **Average room occupancy ratio for last quarter.**

In this client's case, because of the strong seasonality, comparison to the previous quarter is not an effective KPI. It would be more meaningful if it compared like with like, for example comparing Q1 2020 with Q1 2019. The KPI should be adapted to "Year on year change in average room occupancy ratio per quarter".

Creating KPIs

Sometimes, you will need to create entirely new KPIs for use with your client. As you become more experienced as a business coach, you may choose to move away from the guidelines and do this more often.

Identify business areas that need to have their performance measured.

↓

Work out exactly what you will measure

↓

Next, decide on how to measure it. What data will you need to collect?

↓

Use it! Collect the data and see if you can get useful informative measurements from this KPI

↓

Adapt it if needed, to improve it, or to make it a little more focussed. Continue using it for as long as the information is useful.

Diagram S3-5: Process to create and use a KPI

Getting the KPIs right is very important. Poorly chosen KPIs can lead to the following problems:

- Vague measurement concepts
- Trivial measurements with no clear link to strategy / goals
- Measurements not being used in practice because they aren't seen as relevant
- Clients become demotivated because they can't see progress made towards goals

A KPI measures the goals of the business against the actual, quantifiable data over a specified period. To select the right KPIs, follow the below steps.

1. **Clarify**: Before selecting a KPI, make sure you have a clear idea of the problem you want to solve. What is the goal or outcome you want to achieve? How can progress be defined? How will you know you've reached your goal?

2. **Explore**: Consider the possible measures that will show if the goal is being achieved. What could you count or quantify to tell you the extent to which it is occurring? How often would you measure it?

3. **Assess**: What resources are involved? Could there be any unintended consequences? Some things that are very relevant might be hard, or impossible to accurately measure. Other things that you can measure might be less related to the goal in mind. Strike a balance between what is feasible and what is relevant. Aim for the best of both.

4. **Design**: Name and outline the KPI. What is it? How will it be measured? How frequently? Be informative and deliberate in the choice of words, so everyone knows what is being measured and why.

A **poorly designed** KPI is: vague, unrelated to goals, trivial, difficult to measure or overly complex

A **well designed** KPI is: specific, measurable, precise, directly relevant to strategy / goals

Example

Olivia runs a tour guide business in Anuradhapura. She mostly takes guests to see the historical sites, such as Sigiriya and Mihintale and she wants to understand how happy customers are with her service. Olivia and her coach agree on the following KPI:

- **KPI Name**: Customer satisfaction score.
- **KPI goal**: to identify how happy customers are with the tours.
- **How will it be obtained?** Data will be collected from online surveys emailed to customers after their tours.
- **Frequency**: Data will be collated and reported monthly.
- **Assessment**: Satisfaction levels will be rated 1-10, with 7 and above considered positive.
- **Resources involved**: Time to set up the survey and analyse responses. The email survey itself is conducted using a free provider.
- **Any unintended consequences to consider?** People who are unhappy with the tour may be more likely to complete the survey.

Remember

- KPIs can be used in any area of business
- KPIs are measurements over time, so they show improvement, stagnation or deterioration
- KPIs are typically expressed as a number to allow for comparison over time.
- When setting KPIs, coaches should interview, observe the business and review records and documents, not just take the client's word on the data.

Creating KPI do’s and don’ts:

Do	Don’t
✔ Select KPIs that are linked to goals and objectives.	✖ Don’t measure everything just because the data is available. KPIs should be relevant.
✔ Have clear goals that link to the KPIs.	✖ Don’t set so many KPIs that they become unmanageable. Focus on core KPIs.
✔ Analyse KPIs to extract insights.	✖ Collect the data and not evaluate it.
✔ Take action based on those insights.	✖ Create KPIs that are overly complex

The Action Plan

After the evaluation of the business is complete, the coach and client develop the action plan.

This plan is the convergence point for business improvement through skills development. It outlines what needs to be done, by when, and what needs to be provided in order to achieve the goal.

Typically, the plan starts with the priorities that are most effective and require only low investment. These priorities should be visible from the data collected in the Baseline Profile Form (such as an OPI with a score of 1 or 2). This allows the client to achieve ‘quick wins’ and gain confidence in the coaching process. As the coaching continues, additional priorities and actions are added based on the evolving business momentum, accomplishments and challenges.

The action plan is a collaborative document between the client and coach. Priorities and actions are mutually agreed and recorded as action items. The action plan is continually updated as the client makes progress.

How to use the action plan

To create an action plan, use the Action and Skills Development Plan template. Record:

1. The OPI, BEI, or other KPI / area of focus
2. What you and your client have agreed to do. This should be set out as a SMART objective, that includes when it will be done by
3. The date you add each action to the plan

4. What resources and inputs are needed, for example, skills training, financial resources, hiring experts or setting aside time.

5. The date the action is completed.

Share a copy of the action plan with your client so they can implement the actions between coaching sessions.

When creating an action plan it is important that you and your client jointly agree on the content. They need to feel involved and empowered to undertake the tasks set.

The action plan is not static. It is a live document that should be updated and adapted after each coaching session as your client and their business evolves.

Example action plan items for a guesthouse:

Operations / Systems	What to do (SMART objective)	Date Set	Resources / Inputs Required	Date Completed
Poor cleanliness ratings on OTAs	To make a cleaning checklist that the cleaner will tick daily on completion of tasks, and manager will check daily at 11.15am, by 10 April 2021	5 Apr 2021	Time to review rooms, create checklists and discuss with cleaners. Print and distribution of checklists and pens.	8 Apr 2021
Human Resource Management				
Upskilling for cleaners	Upskilling training for cleaners on standards expected, using the new checklist as a guide. Conduct 2 sessions with 3 cleaners in each by 13 April 2021.	5 Apr 2021	Meeting room to host the training. Book extra time in cleaners schedules on 11, 12 April.	12 Apr 2021

Top Tip

It is best not to list all the possible actions immediately. This list would probably be long, and feel intimidating for the client. Instead, begin with actions that are easy to achieve with relatively little investment, then gradually add more as the client reaches these goals.

Remember to use SMART objectives.

Action and Skills Development Plan

This form is a live document. The contents should be agreed between coach and client and updated each time the actions progress. You can add as many rows as required.

This column is for the KPI (BEI, OPI, or other) that you want to focus on.

In this column list down the agreed action that the client is going to do. Structure as a SMART objective.

The date you add the action to the Action Plan

Resources required for the client to successfully complete this action - could be financial, time, skills training needed, etc.

Date completed. Leave this column blank until the action is complete.

The headings in the form are to guide you based on the OPIs and BEIs. Feel free to replace these with ones that are tailored to your individual client.

Areas of Focus for Action	What to do - SMART objective	Date Set	Resources / Inputs Required	Date Completed
Product				
Menus for restaurant	Create a menu for continental and Sri Lankan breakfast options. Include images of food and prices.	9 Mar 2021	Camera / photographer to take images of breakfast	30 Mar 2021
Marketing				
Web page	To redesign the web page and include a photo gallery page, a contact page, and a page for each room type listing features and prices, by end April	9 Mar 2021	Contact information updated. Photographs taken of the deluxe room	
Operations/Systems				
Cleanliness - poor rating on Tripadvisor and Booking.com	To make a cleaning checklist that the cleaner will tick daily on completion of tasks, and manager will check daily at 11.15am, by 10 April 2021	5 Apr 2021	Time to review rooms and create checklists. Time to discuss with cleaners. Audit and stock check of cleaning products. Print & distribution of checklists and pens.	8 Apr 2021
Human Resource Management				
Upskilling for cleaners	Upskilling training for cleaners on standards expected, using the new checklist as a guide. Conduct 2 sessions with 3 cleaners in each by 13 April 2021.	5 Apr 2021	Audit of cleaning products. Meeting room to host the training. Book extra time in cleaners schedules on 11, 12 April.	

After you create the action plan, identify the KPIs that you will use to track performance. These should be recorded in the KPI Tracking Form. See Section 8: Measuring Business Performance for more information on using this form.

Business Development Services

Business Coaching is one of many business development services. In the Blended Coaching model, coaching leads, acting as a service that can also introduce other business development services (BDS) to the client.

Other BDS include:

1. Training
2. Counselling
3. Mentoring
4. Consultancy
5. Exposure visit
6. Collective purchasing
7. Participation in exhibitions / conferences
8. Networking
9. Brokering
10. Social media / online activities
11. Referrals

While the coach is not a trainer or mentor to the client, sometimes - if they have the necessary skills and expertise - their role can involve training and mentoring. Other times, the coach facilitates access to other BDS for the client.

In the development of the blended coaching model, training and exposure visits were found to be particularly effective alongside business coaching, enabling clients to increase their business resilience and standards.

Example 1:
During the coaching process for a guesthouse, it becomes apparent that the client has a skills gap in food hygiene. This requires **training** to fill. The coach can support the client to choose a suitable training course to attend.

Example 2:
During coaching, Chandima, a tour guide decides that she would like to develop her product to offer bird watching tours. She has basic knowledge of birds from her garden, but finds them difficult to identify in flight. The coach encourages her to find a **mentor** from the local Wildlife department who can help her improve her spotting and identification skills. As part of the mentorship she has also learnt a lot about bird migration patterns and been connected with the local university who can provide high quality images of the birds she sees.

Example 3:
During the coaching process for a small hotel, the client is keen to improve their product by using more natural materials. The coach is able to facilitate an **exposure visit** to a nearby villa that has been built using locally sourced materials including palmyra. The villa's sustainability forms a valuable part of their marketing. After visiting the property, the client is inspired by what's possible and motivated to make their own improvements.

Section 4

Managing Change

Introduction

Change is all around us, all the time.

Successful businesses are constantly evolving because the environment in which they operate is always changing. Successful business leaders are adept at managing and responding to change. Both of these facts make managing change a large part of being a business coach.

In this section, you will learn how to understand where your client's business is in the business life cycle and how this affects the type of coaching they will need.

You will also learn how to manage change, including how to overcome resistance to change from your clients, and how to teach them the skills to manage chance in their own business.

What is Change?

Change is inevitable. Some change we like, some we don't like. Some change we initiate, some we adapt to, and some is pushed upon us.

When change happens slowly, we may not notice it. But when change happens quickly, it can be an uncomfortable experience. In business, change can be negative, such as needing to make redundancies, or positive, like moving to a new office because of company growth.

Businesses must constantly evolve or they will die. New technology, new competitors, new government regulations and new market opportunities are just some of the reasons that cause businesses to need to change.

Businesses coaches work with clients as they undergo often dramatic periods of change and development.

Effective coaching can increase enthusiasm for change, eliminate resistance and help identify internal influences of change. As a coach you can prepare your client to be a change manager who leads their business through the process of change towards success.

This includes:

- Communicating the need for change
- Training people in new skills and processes
- Minimising resistance to change

Within the hospitality and tourism sector, there has been a huge amount of recent change. Technology has made independent travel more accessible than ever before. For example:

- People no longer need to use travel agents to make reservations or to book flights.
- Review sites allow people to decide where to stay, where to eat and which sites to visit in Sri Lanka.
- Apps like PickMe and Uber have changed the sector for three wheelers and taxi drivers.
- Social media allows businesses to reach their target audience directly, with no need for intermediaries or traditional print advertising.

Understanding the Business Life Cycle

As businesses change and develop over time, so too do their aims, objectives, priorities and strategies. Each stage of a business comes with a unique set of obstacles to handle and overcome.

The business life cycle refers to the changing stages of a business, from start-up to maturity. This is commonly separated into stages. While there is some variation on the names for these stages, they are typically accepted as Concept, Start-up, Growth, Maturity and Decline or Renewal.

Business coaches must be skilled at:

- Identifying which stage of the life cycle their client's business is at
- Explaining this to their client
- Tailoring the coaching accordingly. The maturity of the business will affect the organisational decisions that need to be made.

The following diagram shows the typical arch shape of the business life cycle, measured as growth in sales (y axis) against time (x axis).

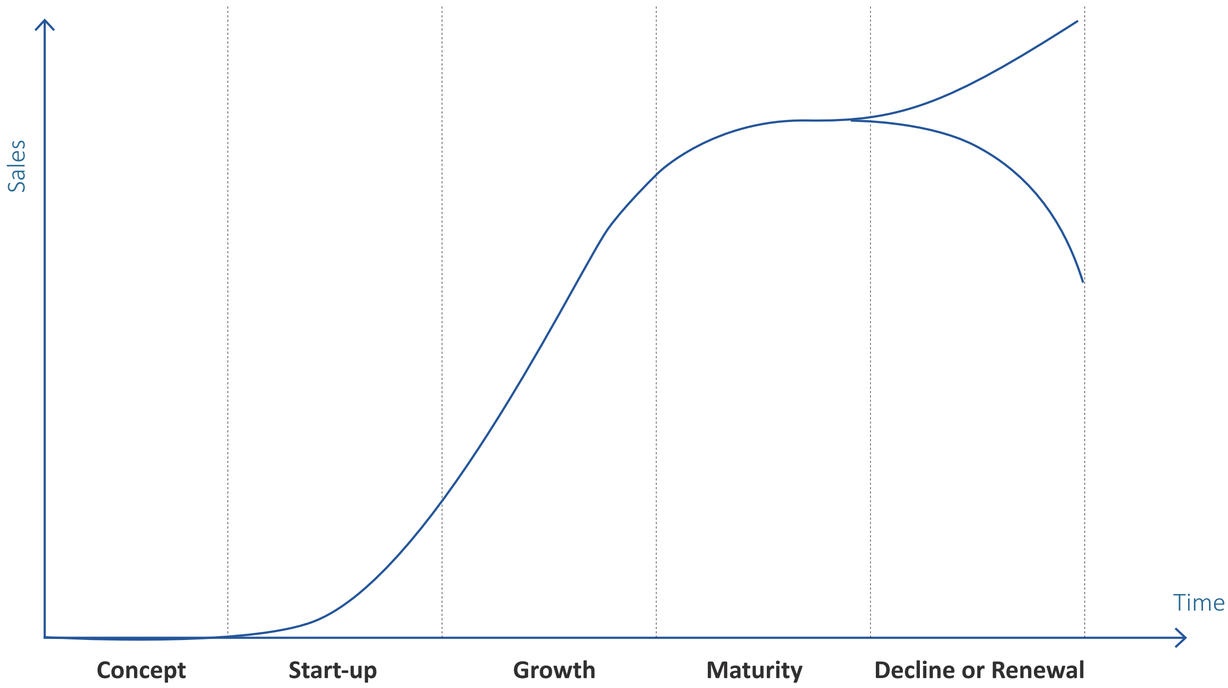


Diagram S4-1: The business life cycle

A business is always changing; from the start, through further product refinement and making sure systems help run the business, to maturity. A mature business may be fine for some time, but eventually the market will change. The business must adapt and innovate, or it will stagnate.

Why is the business life cycle important for coaching?

Business coaches need to provide support that is appropriate to their client. Since each client is unique, it's important to understand where their business is in the business life cycle, and to adapt accordingly. The coaching needs of a new start-up are going to be very different from the needs for an established business with multiple employees.

Business coaches need to be able to a) gather information to identify which stage in the life cycle the client is at and b) explain the life cycle to clients - what it means, and how it works as a helpful tool to identify areas to focus on.

How the business life cycle works

The shape of the business life cycle represents the typical business behaviour:

1. In the initial **Concept** stage (1) there are no sales as the business is not yet launched.
2. In the **Start-up** stage (2) sales are typically slow - gradual as the business fine tunes its offerings. There are often unexpected issues that new businesses have to handle in this stage.
3. In the **Growth** phase (3) sales grow rapidly as the business establishes itself.
4. This is followed by a long duration called the **Maturity** stage (4) where the business runs steadily.
5. After this, depending on the actions taken, the business may enter Decline with falling sales, or **Renewal** with innovation and new offerings (5). If decline continues, the business will eventually run at a loss with sales insufficient to cover running costs.

Stage	Situation	Business situation	Business focus areas
1 Concept	Flat line represents no sales as the business is not launched yet	This is the researching and planning phase before launching a business.	Assess how viable the business is Research products / services Plan marketing and funding
2 Start-up	Gentle upward curve represents slow, gradual increase in sales	The business is new to the market Business model still being tweaked Limited processes and systems Many initial problems could occur Corporate / organisational structure not yet formed	Developing a sustainable business model Adaptability - tweaking products / services based on feedback Marketplace penetration
3 Growth	Steep upward curve represents strong growth in sales	Business solidifies its place in the marketplace and generates a consistent source of income New clients are regularly gained. Existing client relationships are maturing Profitability increases. Retaining employees and covering payroll should not be concerns May require investment to help the business grow	Inward focus on building teams, processes and system Establish a growth strategy Identifying and overcoming challenges to growth Managing increasing revenue Workforce planning - hire the right people

Stage	Situation	Business situation	Business focus areas
4 Maturity	Curve flattens representing consistent sales but little growth	Business is dependable and consistent Operations are smooth Revenue is relatively predictable Talented team takes care of much of the day to day business running	Retaining market share Look for opportunities. Consider expansion or new offerings while measuring risk
5 Decline or Renewal	Downward curve represents declining sales OR Upward curve represents new growth	If declining sales continue, business will begin to run at a loss If business is able to generate new sales growth, it will enter a phase of renewal (or re-birth). This becomes a new growth phase and the cycle continues.	Innovation Identify how to pivot to meet changes in the market

Remember

While the arc is a typical representation of the business life cycle, not every business will follow the same pattern. For example, a new business may experience a period of intense growth just after launch, rather than a gradual increase in sales.

The importance of data

Business owners may not accurately understand where their business is in the life cycle. Surface level information may give one impression, while the true situation is different. Gathering and reviewing the right data is crucial in accurately understanding a business..

For example, a business owner believes they are in stage 4 - Maturity because their sales are growing consistently at 1.5%. They feel comfortable with their business position. However, closer examination reveals that all their growth is coming from one large client while they are losing others. They are really on the edge of stage 5 - Decline. If they lost that big client the business would be vulnerable. The coach advises them to look at innovation and ways to generate new clients.

By analysing the business performance you can identify where your client's business is in the life cycle. KPIs are one effective tool. Refer to section 8: Measuring Business Performance for more information on other business analysis tools.

How to tailor your coaching

The chart below displays how the focus of the coaching varies depending on the stage in the business life cycle.

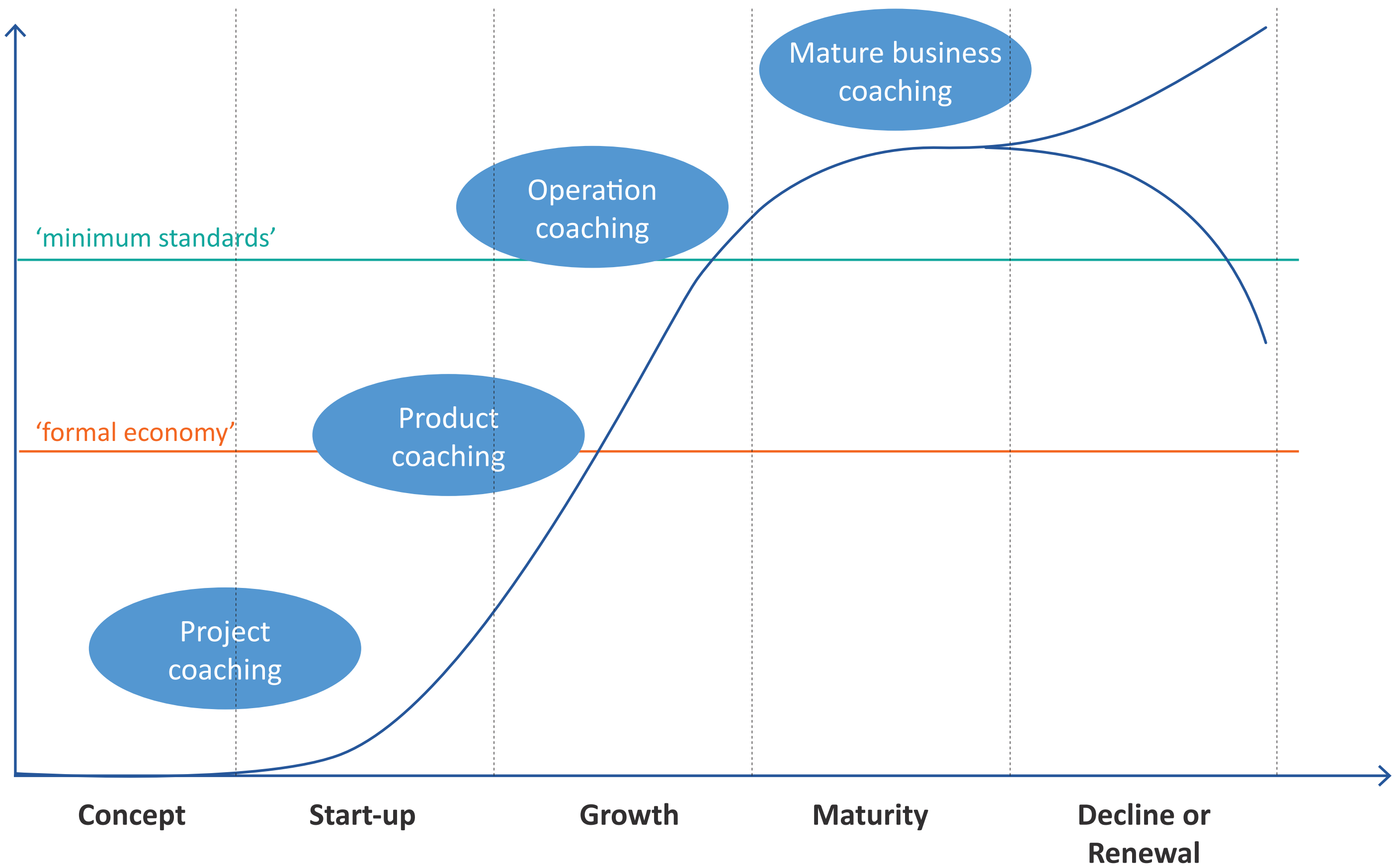


Diagram S4-2: Coaching and the business life cycle

Based on the development stage of the business, the coach and client can tailor the areas of focus for improvement. These typically include:

Focus of coaching	Description
Project coaching	Typically takes place at the early stage of a business. **Business plan:** design, suitability, requirements, market factors, product/service concept **Resources: skills**, funding, research, human capital required
Product coaching	Typically takes place during start up and growth phases. **Product development**: improving the quality of the product based on customer feedback and to meet quality standards.
Operation coaching	Typically takes place in the growth phase. **Marketing and distribution**: improving the way the product meets its potential target audience. Establishing robust systems to attract and manage customers. **Operation and management**: improving how the business is managed from reservation to accounting, including human resource management. **Employment outcomes**: income, security, retention and inclusion
Mature business coaching	Typically takes place in the maturity phase. **Business management**: management and leadership skills. **Innovation**: identifying opportunities to expand, diversify and pivot to meet changes in the market

Examples of the business life cycle

Example client	Stage of the business life cycle	Coaching need
Ahmed is a fisherman. He has a boat and an outboard motor. He generally fishes at night. His younger brother and a neighbour work with him. There is a reef with a lot of fish not far offshore. He has noticed that tourists have started coming to his beach.	**Concept stage**	*Ahmed* so far only has an opportunity and an idea. The need is project coaching
Rukmani has a roadside stall on a main road selling tea, cold drinks, roti and buns. These days, she is getting more foreign customers. She has noticed they never finish their tea. They sometimes look like they are going to buy food, then change their minds.	**Start up phase**	*Rukhmani* needs to identify products that will be attractive to foreigners (such as tea that isn't sweet and very milky). The need is product development
Aarushi manages the business, and her three brothers take groups of tourists on walks, birdwatching, visiting homes, or visiting temples. But she gets confused about who is doing which trip, with which group. She has too many slips of paper!	**Growth phase**	*Aarushi* needs systems to organise her management of the groups. The need is operation coaching.
Yogi had the only guesthouse in town, with several foreign guests. Now there are new guesthouses, with signs talking about Tripadvisor and Facebook. Someone mentioned bookings online. Yogi feels he needs to make changes, but doesn't know where to start.	**Maturity stage**	*Yogi* has a mature business, in danger of being overtaken by new arrivals. He needs to evaluate what his business does. The need is mature business coaching

The table below shows topics your client may need support with at different stages of the business life cycle.

Concept	Start-up
Understanding the business environment Assessment of the client’s ability to launch the business Having a range of suitable services / products for their business ide Understanding the market feasibility Creating a business plan Identifying sources of resources and technology Understand the legal and regulatory background to their business	Setting business targets Business registration Legal and environmental regulations Competitor analysis Recruitment and training of employees Procurement Technology and systems Being responsive to customer feedback Product marketing and launch Market penetration Internal policies and procedures Quality management
Growth	**Maturity**
Recruitment and retention Increasing efficiency Improving systems and technology Quality management Increasing services / production capacity Strengthening distribution networks Stock management and purchasing	Ongoing analysis of the business Assessment of the changes in the business environment Quality control and improvement Customer survey and satisfaction Research and development Product development Market development Modernisation of production Cost reduction Process and product innovation
Decline	**Renewal**
Cost reduction Elimination of loss-making product lines Reducing the scale / size of business Staff reduction Selling part of the business Bankruptcy	Cost reduction Innovation strategies Business expansion Diversification of products or services

Managing Change

Implementing change is not easy. Often people are resistant to change. Even if they understand why the change is needed, there can be an emotional response to it, including shock and frustration. Change can also feel like a scary process.

You may find your client is resistant to change. Your client may find that other people within their business are resistant to change. To progress towards goals, this needs to be overcome.

Understanding resistance

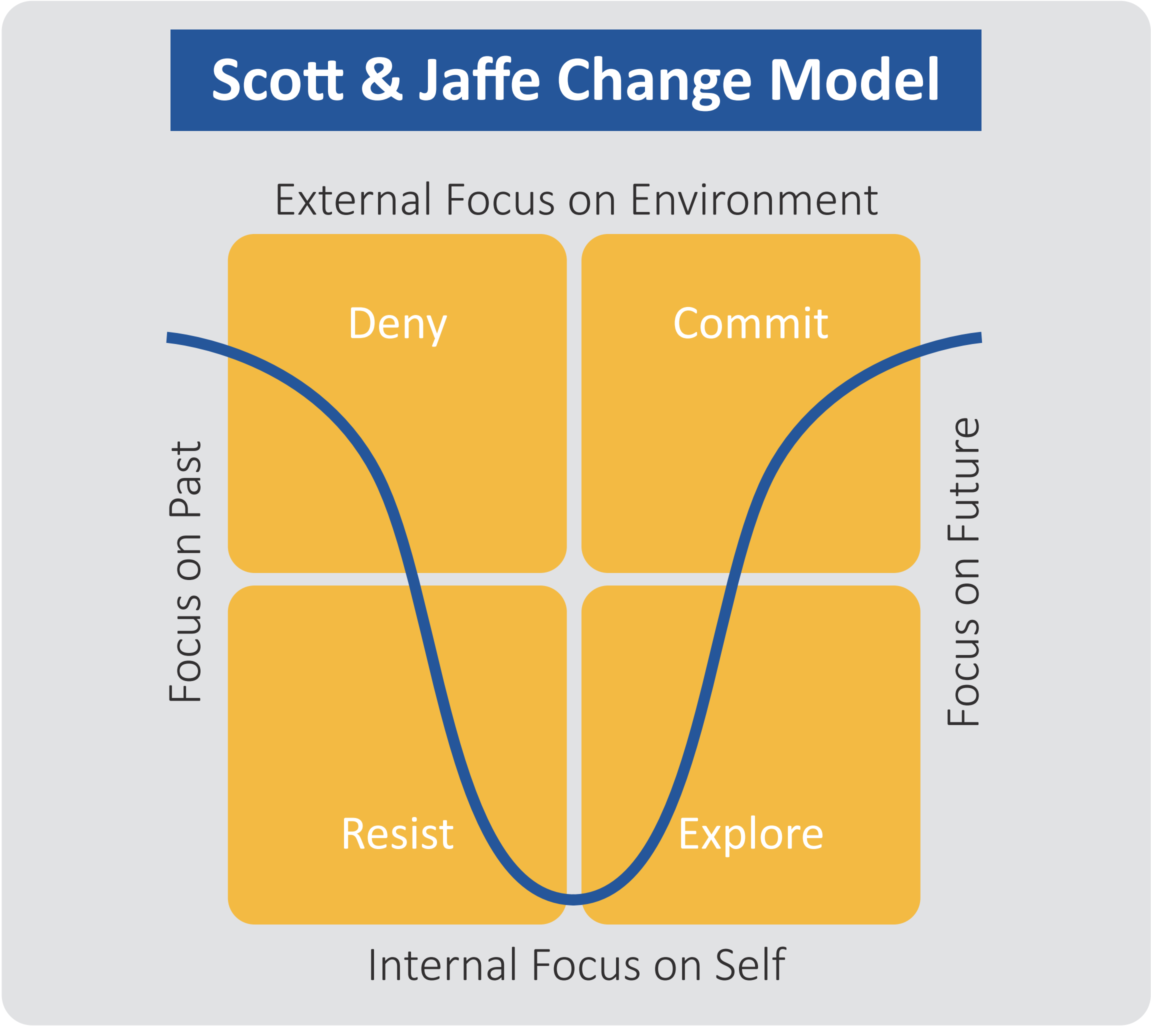
Kotter & Schlesinger identified four types of resistance:

	Type	Description
1	Self-interest	They feel they will lose something. They are focussed on self, not business. Leads people to undermine change.
2	Misunderstanding and lack of trust	They don't trust management. As a result they may also misunderstand/ suspect. They may even resist a change beneficial to them.
3	Different assessments	This can be a good thing as management doesn't necessarily have all the facts. Listen to this and assess.
4	Low tolerance of change	Some people just hate change.

Identifying the type of resistance is the first step to overcoming it.

How people deal with change

The change curve shows how people's feelings towards change progress over time.



- Initially there is **denial** of the need for change, which often includes ignoring
- Then **resistance** to engage with it.
- This is followed by **exploration** of the change, which is usually self-focussed at first such as asking 'how do I feel about this'.
- Next comes integration and **commitment** where the change becomes normal and people take ownership of it .

The person (represented by the curved line) enters and exits at the same productive level, but experiences a dip as they process the change. It is the work of change management to make the dip as shallow and short as possible.

Four stages to overcome resistance

To help minimise resistance, the 'change manager' who is leading the change can take the following steps to help people through the four stages of resistance.

Stage 1: Deny	Stage 2: Resist
Help people understand what is really true: 1. Clearly communicate reasons for the change 2. Also communicate the negative implications of not changing 3. Ask for alternative suggestions, and take these seriously 4. Make sure they fully understand what is expected of them (and what is not) 5. Ask what they know about the change, and fill any gaps 6. Talk to them about how they feel about the change	Help move beyond blame and negativity: 1. Acknowledge the genuineness of feelings. Never be dismissive 2. Ask what steps they can take to help manage and own the change 3. Help them to take these steps. This may involve training or changing work patterns 4. Encourage doubters to talk to those who think it a good change
Stage 3: Explore	**Stage 4: Commit**
Encourage people to try things out and look to the future: 1. Ask how they can make a difference towards the change 2. Ask what they would like to create from this change. Can you accommodate that? 3. Ask them how the future looks, for the business and for them personally 4. Ask them if they can see future opportunities from this change	Encourage everybody to contribute: 1. Ask how they will know that the change has succeeded 2. Congratulate them 3. Explore how rewarding it feels to be part of this success, and encourage them to take pleasure in this 4. Encourage them to think of further opportunities for themselves and the business

Remember

The 'change manager' may be the coach helping a client to make changes. On other occasions, it may also be the client who is making changes in their business, and experiencing resistance from those around them.

Prepare for resistance

Kotter & Schlesinger also suggested Six Change Approaches to use as techniques to minimise resistance.

Approach	How to use it
Education and Communication	Do this before you start the change, to help with understanding of why the change is proposed. It's better to over-communicate than under-communicate. Use varied methods such as one-on-one and team meetings. Sharing your vision for the improved future, post-change, when things are working smoothly and successfully, can be a powerful way to communicate change, and engage people in the journey. **Pro:** Greater understanding gets people involved. **Con:** Can be very time-consuming, depending on numbers.
Participation and Involvement	Include people in the design of the change. This will give people a greater sense of buy in or ownership. Fosters commitment, rather than just compliance. **Pro**: Buy in of potential resisters, and possible problems foreseen. **Con:** Need to make sure no inappropriate change is designed.
Facilitation and Support	Carry people through the change to mitigate resistance. This can mean training/ education and/or emotional support. It is suitable when people resist through fear or anxiety. **Pro**: Stop fear and anxiety spreading any further. **Con**: Can be time-consuming and expensive, and may not work.
Negotiation and Agreement	Come to an arrangement with (potential) resisters. This may involve offering an incentive, financial or other. Can be suitable for someone who stands to lose from change. **Pro:** Can be a quick and easy to head off resistance **Con**: Can lead to resentment in others if seen as unfair.
Manipulation and Co-optation	Manipulation means using information selectively, usually hiding some aspects for now. Co-optation means giving a role in implementation to an individual, especially if they are a leader who can bring others along. Often an ethically grey area. **Pro:** Quick and inexpensive. **Con:** If people feel you are playing them they may resist even more.
Explicit and Implicit Coercion	Basically, you are threatening. A person may lose her/his job, be demoted, be moved to another function. This can be clear or suggestive. May be suitable if speed of change is important. **Pro**: Quick. Concentrate minds. **Con:** Can backfire if people feel ill-used.

Case Study

The client:

Aarushi manages a family tour guide business. Her three brothers take groups of tourists on walks, birdwatching, visiting homes, or visiting temples. But she gets confused about who is doing which trip, with which group. The business is advertised on boards outside the supermarket and the bank in the village, and they have a facebook page, and a google business page. They have had some good reviews, which definitely brings more business. They also get recommended by some hotels in the area.

- The problem is a group (maximum 12 people) may be made of one family, or it may be made up of people from 2 or 3 different places.
- Aarushi used to be able to hold everything in her head, but now she may have 3 or more groups every day, and some people book in advance, others on the same day.
- She isn't able to keep track of all of the bookings. By mistake she let 20 people join one group and she only had 12 water bottles.
- Transport is also a problem. Groups usually start from the front of the house, but if it's a single family they may want to be collected.
- Some of the older tourists can't manage the whole walk by themselves, and need transport between sites. She has numbers for 6 or 7 three wheelers, but sometimes can't reach any.

Poor Aarushi is getting stressed, and her brothers are blaming her.

Where is she in the Business Life Cycle?

Aarushi's business already has a number of clients, sometimes more than she can handle. It is in the growth stage and needs help with processes, systems and planning. Her primary need is for operations coaching.

What are the priorities?

1. Implement a reliable system for tracking bookings
2. Solve the problem of transport by confirming with guests if they require transport when they book in advance. Set up agreements with local drivers to be available for those booking. Aarushi needs to be confident she can serve her clients.
3. Bulk-buy water bottles in advance so there is always a supply. Coordinate purchases with the improved booking system.

Who may resist these changes? Why?

1. Aarushi may resist a formal system for tracking bookings. Although she knows this is a problem area, she could be nervous about learning a new process.
2. The drivers may be reluctant to agree to work in advance, perhaps they like the flexibility of their current way of working.
3. Aarushi's brothers may resist buying water in advance because of the financial expense.

By understanding the changes required and who may resist them, Aarushi's business coach can help her prepare to manage the changes in the best possible way. This includes first guiding her, and then helping her guide her brothers and the drivers through the stages of resistance, until they are ready to commit.

Section 5

Diversity and Inclusion

Introduction

Helping people overcome barriers is a central part of business coaching. These barriers may be specific to the individual, such as a lack of expertise on a particular topic, or related to the business area, such as unavailability of key supplies.

Some businesses experience more barriers than others. This is also true of individuals - some people experience more difficulty in entering and succeeding in business than others.

This section introduces the concepts of diversity and inclusion and why they matter for business coaching. It explores the barriers that different groups of individuals may face and how these can be overcome.

It also covers how you can help your clients to become more inclusive for their customers and staff, and the business benefits this brings.

Diversity and Inclusion Concepts

Concept	Explanation
Marginalisation	Marginalization is when an individual or group is put into a position of less power or isolation within society because of discrimination or a misguided perception. When an individual is marginalized, they are unable to access the same services and resources as other people and it becomes very difficult to have a voice and equal place in society. Possible reasons for marginalisation in Sri Lankan include: minority groups based on ethnicity, religion, gender (women / LGBTQ), age, persons with disabilities including: • Visual impairment • Hearing and speech impairment • Physically challenged • Intellectual impairment
Barriers	are factors in a person's environment that, through their absence or presence, limit functioning and create disability. An example of this would be the stereotypical perceptions that most people hold about persons with disabilities.
Inclusivity	is the practice of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalised, such as those who have physical or mental disabilities and members of other minority groups (such as youth and women). In the workplace, it is also making sure that all members of the workforce are seen, heard, valued and respected.

Concept	Explanation
Diversity	means variety - it refers to things or people that are different from each other. In a workforce, it is having a mix of employees with a variety of differences, both seen and unseen. People can be different from each other by the country of origin, family and ethnic background, race, sex, age, culture, professional background, physical ability and appearance, training, religious or political beliefs and personality.
Privilege	is a special benefit that is available only to a particular person or group.
Unconscious Bias	is an automatic response triggered by our brain when making quick judgements and assessments of people and situations. This automatic response operates beyond our control and awareness and often leads people to make quick and often inaccurate judgements which are mainly influenced and shaped by their own background, cultural environment and personal experiences. Another word for this is stereotype.
Disability	is any condition of the body or mind (an impairment) that makes it more difficult for the person with the condition to do certain activities and interact with the world around them.
Resistance	is an active pushing back against an idea, policy or perspective.
Empowerment	is the process of enabling people to increase control over their lives by increasing their resources and by building their capacities to gain access, partners, network and a voice. This concept is connected to social development groups such as the poor, women, youth, older persons and persons with disability.

What is the Impact?

Globally:

15% of the world's population experience some form of disability[1]

One-fifth of the estimated global total experience significant disabilities: between 110 million and 190 million people[2]

Only 15% of persons with disabilities (PWD) were disabled at birth or before the age of 16.

Persons with disabilities, on average as a group, are more likely to experience adverse socioeconomic outcomes than persons without disabilities.

Persons with disabilities and their families often incur additional costs to achieve a standard of living equivalent to that of non-disabled people. In Australia the estimated costs, depending on the degree of severity of the disability, are between 29% and 37% of income;[3] in Vietnam, 9%.

In Sri Lanka:

In Sri Lanka about 8.7% of the total population above the age of 5 live with some form of disability.[4]

About 57% of people with disabilities are female, and 43% are male.[5]

[1]World Bank https://www.worldbank.org/en/topic/disability

[2]World Bank https://www.worldbank.org/en/topic/disability

[3]World Report on Disability, WHO, 2011 https://www.who.int/disabilities/world_report/2011/report.pdf p43

[4]Disability in Sri Lanka, Department of Census and Statistics (2012) https://unstats.un.org/unsd/demographic-social/meetings/2016/bangkok--disability-measurement-and-statistics/Session-6/Sri%20Lanka.pdf

[5]Disability in Sri Lanka, Department of Census and Statistics (2012) https://unstats.un.org/unsd/demographic-social/meetings/2016/bangkok--disability-measurement-and-statistics/Session-6/Sri%20Lanka.pdf

In 2012, the number of physically or mentally impared people identified by the Census was 1,558,852. Of these 70.9% were economically inactive.

Of the population not engaged in economic activity 36.9% were engaged in household work while 48% were not in a position to be engaged in any work due to old age.

A study commissioned by the Ministry for Social Welfare in 2003 found that for persons with disabilities:

- Employment rates varied from 1% - 26% depending on the type of disability. (For comparison, at the time the national unemployment rate was around 10%). Of those employed:
    - 32% self-employed
    - 29% in government employment
    - 13% in private sector employment[6]
- Vocational training was accessed by 5% - 20%
- 84% or more had a household income of less than USD 2.00 per day.
- From this low-income perspective, people who have a disability become dependent on others. 53% of families said that they had to incur extra costs and 51% of families had lost the possibility of earning more income because of the disability of a family member.

Disability	In employment	Access to skills development[7]
Visual	14%	15%
Speech	11%	15%
Hearing	21%	20%
Mobility	26%	16%
Intellectual	1%	5%
Psychiatric	7%	11%

[6] Ministry of Social Welfare, National Policy on Disability for Sri Lanka, 2003, p13 https://www.who.int/disabilities/world_report/2011/report.pdf

[7] Ministry of Social Welfare, National Policy on Disability for Sri Lanka, 2003, p12 https://www.who.int/disabilities/world_report/2011/report.pdf

Women and the workforce

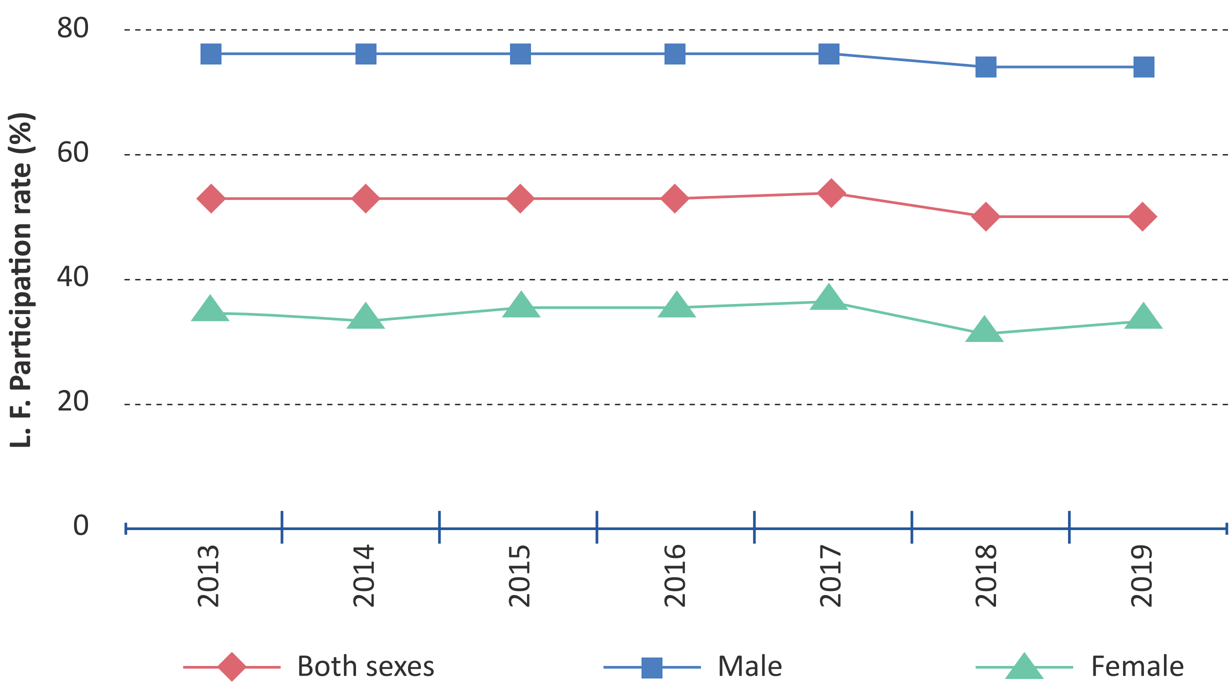
In Sri Lanka, there is a substantial gap between male and female participation in the workforce.

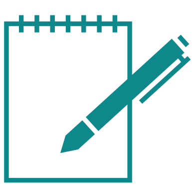
The labour force participation rate in 2019 was:

- 52.3% overall
- 73% for men
- 34.5% for women

The number of women participating is half that of men. This is a trend that has been ongoing for years. Around 5.8 million women in Sri Lanka are economically inactive.

Annual labour force participation rates 2013 - 2019 (Age 15 years & over)





Economically active: employed or unemployed during the reference period

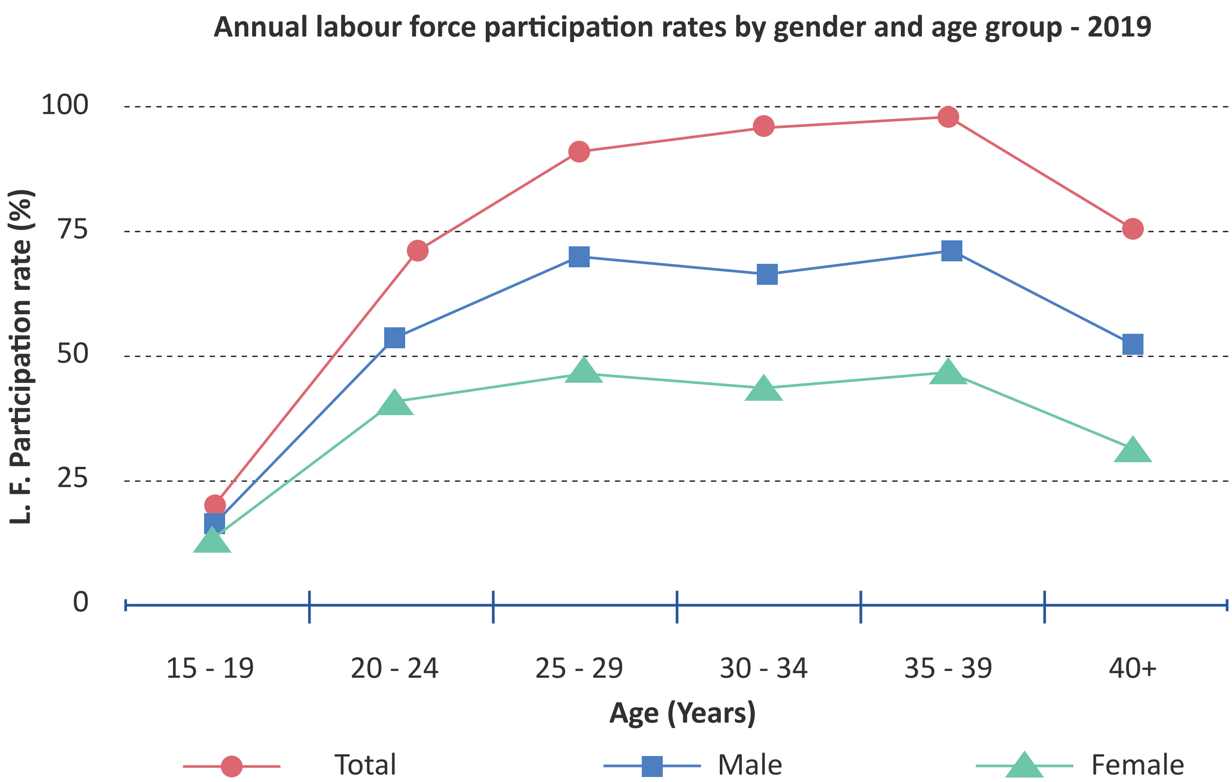
Economically inactive: neither working nor available / looking for work

Labour force: composed of people (age 15 years and above) who are economically active

The difference in participation rate is stark. During prime working age (25-54 years) 94.7% of males are participating but only 46.3% of females[8].

Why?

62.4% of women reported being economically inactive due to their involvement in household activities. For males, this percentage is only 4.3%.



[8]http://www.statistics.gov.lk/Resource/en/LabourForce/Annual_Reports/LFS2019.pdf p10

Terminology

The language used to talk about persons with disabilities (PWD) is constantly evolving. Organisations, doctors and psychologists are continually trying to suggest words which are empowering rather than condescending or hurtful. It's a good idea to keep regularly up to date on the correct terminology.

Don't use	Do use
Physically Disabled	Person with physical disabilities
Mentally handicapped	Person with an intellectual disability
Slow learner	Person with a learning disability
Deaf	Person with hearing loss
Blind	Person with a visual impairment / loss
Mentally retarded	Person with an intellectual disability
Differently abled / special needs	Person with disability
Crippled	Person with physical disability

Some persons with disabilities prefer to use person-first language when referring to themselves, "a person with a disability", others prefer to use identify-first language, "disabled person".

Non-disabled people should respect and affirm each individual's choice of language that they prefer to use about themselves. If in doubt, ask.

Develop Your Awareness

Below is a list of 12 questions. How many do you answer yes to?

1. Does either of your parents have a university degree?
2. To you have access to private transport (not buses, trains)
3. Do you feel safe walking alone at night?
4. Does your household employ help as cooks, drivers, gardeners, cleaners etc.?
5. Have you ever been discouraged from taking part in an activity because of race, class, ethnicity, gender, disability, or sexual orientation?
6. Have you ever been spoken over, because you couldn't articulate your thoughts fast enough?
7. Do you come from a single-parent household?
8. Do you live in an area with crime or drug activity?
9. Were you encouraged to attend university by your parents?
10. Did you or your family inherit money?
11. Have you ever lost or received a job opportunity or business contract because of something you couldn't change (eg. race, colour, disability or family connections etc?
12. When in trouble, would you hesitate or think twice about calling the police?

Certain things in life give us privileges, others disadvantage us. What is important to remember is that these privileges / disadvantages are not of our own doing. They are caused by circumstances and events outside our control. They include:

1. Social capital - family and friend networks
2. Socioeconomic status
3. Religion
4. Ethnicity
5. Cultural norms and expectations
6. Occupation
7. Education
8. Gender

Many of these privileges are unknown to us. We do not know that we have the benefit of a supportive family environment or above average wealth, because for us it is normal.

We tend to judge others against the same standards as ourself, without stopping to consider their circumstances and the barriers they may be facing.

Our social identities shape our experiences in the world and how we view it (including the conscious and unconscious biases we hold).

Why is this important?

Business coaches need to develop an awareness of their own - often subconscious - responses to diversity. It is vital that you understand your own biases, life conditioning and prejudices. This means being able to 'see' through other people's eyes, not just your own.

Effective coaches are able to 'see' through the eyes of their clients, who may have a very different background, culture, education, experience, hopes and fears to their own.

Assumptions and subtle differences can lead to misunderstandings that damage the coaching relationships and make the coaching process less likely to succeed. When it comes to diversity, it is the role of the coach to be self-aware and guide the process for both the coach and client. Done correctly, the outcome can be extremely enriching.

Use reflective practices to think about your own experiences, to integrate cultural awareness and knowledge into your practice, and to proactively and continually learn. See Section 11: Growth Mindset for more on this.

Persons with Disability (PWD) and Women

Business coaches need to be able to think practically about issues of diversity in the workplace, both in the context of a) helping clients with their own diversity awareness (for the benefit of their employees and customers and b) in their dealings with their coaching clients.

As a business coach, you may be coaching someone with a different background to your own. This could be around ethnicity, culture or age, for example, a 52 year old male Sri Lankan coach, whose client is a 32 year old German lady setting up a business in Sri Lanka for the first time; or values and beliefs, such as a non-religious coach whose client follows the principles of Islamic finance.

An effective coach will be aware of assumptions that might limit, or empower, both the client and coach. They will also be aware of barriers that others face.

Examples of barriers

Source of barriers	Barriers for PWD	Barriers for women
Personal and family	Communication barriers, financial barriers, health issues, poor literacy. Lack of availability of assistive devices. Unsupportive culture, negative attitudes towards PWD working in income earning roles. Lack of access to personal computers and high cost of telephone services.	Language barriers, financial barriers, role conflicts at work and home. Lack of self-belief. Unsupportive family and neighbours, negative attitudes towards women working outside the home (especially in tourism), the belief it is ‘safer’ for them to work in the domestic sphere. Lack of access to personal computers and digital literacy skills.
Society and culture	Perception of PWD as helpless, or people who should be helped, leads to limited opportunities for them to develop self reliance and potential. Superstitious beliefs stigmatize PWD, and sometimes also their families. Charity towards PWD, practiced in the belief that the giver is more fortunate than the receiver, reinforces negative attitudes towards PWD.	Negative attitudes towards women working in income earning roles. Multiple role management. Women who work are still responsible for household management, husbands being not skillful (or willing) at household work. Lack of mentoring and role models.

Source of barriers	Barriers for PWD	Barriers for women
Environmental and transport	Lack of accessible public transport for people with mobility disabilities severely limits employment and educational opportunities. Inaccessible buildings (steps, lack of lifts etc.).	Sexual harassment on public transport.
Employment and working environment	Challenge for owners to see PWD as capable people. Poor attitudes and apathy shown towards them. Possibility of rejection by organisations, exploitation and unsupportive environments. Lack of inclusivity features, such as basic sign language being known to employers.	Challenge for owners to see women as capable people professionally. Sexual harassment in the workplace. Poor attitudes towards women. Unfriendly corporate culture. Exclusion from informal networks and channels of communication.

For both PWD and women, stereotypes and beliefs about them are major barriers to employment and entrepreneurship.

For PWD, the National Policy on Disability found that low levels of private sector employment was largely due to the attitudinal barriers posed by employers.

For women, gender stereotypes are both personal (their individual beliefs) and external (society's beliefs). In addition, women face a major barrier in balancing the domestic role with income earning, and often lack support from male partners. This challenge can lead to high turnover rate and perpetuate the view of women as 'not suited' to workplace roles.

Example

Sharmila has been running a small food stall outside her house and she thought about getting registered as a business. This would allow her to feel like a proper business woman, and she dreamed of one day starting a proper restaurant with cooking classes for the tourists who visit. However, after trying, she soon decided against this going through with the registration. When she reached out to the officials for information and forms she was ignored, and worse, one of the officials made rude comments to her and did not treat her properly. When she spoke to her brother about the experience, he said 'what do you expect, a woman like you cannot be doing things like that'.

Setting up a business can be stressful for anyone. But women and PWD may need special support and motivation to formalise this process. They may experience barriers that others do not, such as:

For women:

- Limiting attitudes towards self and their own capabilities
- Officials ignoring women in information services and sometimes the officers not treating them properly due to poor attitudes towards women

For PWD:

- Lack of information and knowledge about the benefits of a registered business
- Not being able to prove the ownership of the business premises
- Lack of confidence to get it done through the authorities. This may be linked to prevailing social conditions, such as the difficulties society has in believing in PWD as capable people
- Lack of the accessible facilities at the organisations conducting registrations, such as proper transport facilities, accessible buildings, communications facilities etc.

Within the tourism sector:

Within the tourism sector there is another barrier due to the stigma attached to hotel and hospitality roles. Generally, society considers hotels too open and hence women will be "spoiled" in their character if they work there. Therefore, they perceive hotel employment is inappropriate for women. The prevailing situation may be changing now, with more young women willing to work in hotels, however there is still a negative view taken by family members, especially parents who do not wish them to take such jobs.

Sexual harassment

Sexual harassment is behaviour characterized by the making of unwelcome and inappropriate sexual remarks or physical advances.

In Sri Lanka, unfortunately it is common for women to experience sexual harassment in workplace situations. This can lead to them dropping out of work, creating high turnover for employers and reinforcing the negative perception about the tourism industry.

Common concerns from women include:

- Harassment complaints not being taken seriously or acted on because the accused is a senior or important member of staff, e.g. the Chef at a restaurant.
- Lack of support and routes to make a complaint when the manager / owner is the harasser.
- Since COVID-19, being forced to work in an environment they find inappropriate, such as a female demi-chef being transfer to the bar and having to have close conversations with customers during the night shift

It is important for business coaches to help clients create safe working environments for women, and all employees.

Models of Disability

There are four main frameworks used to describe disability. These are known as 'models' of disability.

1. Medical model
This views PWD as incapable of fitting into mainstream society. They are broken.

2. Charitable model
This views PWD as vulnerable and reliant on others to perform certain tasks

3. Social model
This asserts that the limitations PWD experience are the result of inaccessible systems and barriers in mainstream society. PWD are disabled because of the environment they live in, not the features of their own bodies.

4. Human rights model
This views disability as a natural part of human diversity and must be respected in all its forms. PWD have the same rights as everyone else in society, and governments need to play a role in upholding these rights.

It is important to understand these models so you can understand how other people, such as your clients, may think about PWD.

Case study of the four models

Scenario

Sumaiya is 8 years old and uses a wheelchair. She cannot attend her local school because the buildings are not accessible.

Medical model
Sumaiya is the problem because she is unable to access buildings that other children can.

Charitable model
Sumaiya's needs would be best provided for through specialised support, outside of a mainstream school.

Social model
The school is the problem, because it has not been designed to be accessible.

Human rights model
Sumaiya has the right to access the school of her choosing. Governments should take steps to make sure school premises are fully accessible and provide her with additional support she needs.

Now, the human rights model is favoured. The medical and charitable models are both inconsistent with the human rights model, for different reasons.

× The medical model focuses on a person's impairment and sees the disability as a problem. It fails to acknowledge society's role in restricting access and uses the disability as an excuse to restrict or deny someone's rights.

× The charitable model portraits PWD as being reliant on others. It fails to value the views of PWD and doesn't acknowledge the role society plays in restricting access to PWD.

In 2006 The United Nations Convention on the Rights of Persons with Disabilities document was finalised. The Sri Lankan government signed and ratified the convention. In doing so, it made a legal commitment to uphold the principles the convention establishes.
The human rights model exists because of this UN convention.

The human rights model:

√ Embraces impairment

√ Recognises the right of PWD as experts in all matters that affect them

√ Recognises that equality does not mean treating everyone the same way

√ Places accountability on governments to take action

The Business Case for Hiring PWD and Women

Equality is not only a fundamental human right, it is beneficial for society, and makes business sense.

A gender diverse and inclusive culture is an asset to any business. By closing gender gaps and embracing diversity, companies can:

- Spark innovation
- Unlock new opportunities
- Improve performance.

Businesses with diverse workforces are more likely to have the range of skills needed to be innovative, creative and better able to secure market share in a contested world. In addition, at a time when many industries - including hospitality - are facing a shortage of talent, PWD encompass a large, and growing, talent pipeline.

There is ample data that companies with a diverse workforce outperform those without. A global survey of over 21,000 companies found that increasing female leaders from zero to 30% led to an increase in net revenue margin by 15%[9].

A separate survey found companies that championed persons with disabilities outperformed others. They saw:[10]

- 28% higher revenue
- 200% higher net income
- 30% higher profit margins

Creating a supportive and inclusive work environment leads to:

- Less harassment and discrimination = **more productivity**
- Reduced absenteeism and turnover = **lower costs**

When employers treat all their employees well (with good remuneration, benefits, safe working environment etc.) there is a positive effect on the overall business of the enterprise.

Increasing diversity allows companies to ‘think outside the box’ by embracing perspectives that were previously excluded. It opens up opportunities for business growth - PWD and their families are a very large market share.

Gender diversity leads to a better ability to serve the female customer market. For examplein 2013, Vodafone launched the Vodafone Woman First Program to help women use technology, acquire skills and increase income. 75,000 women signed up and in the first 9 months of the program Vodafone saw 15% increase in new customers.[11]

[9] https://prezi.com/view/9x3lnnT1KBhqV7x4vjyl/

[10] Accenture, Getting to Equal: The Disability Inclusion Advantage, https://www.accenture.com/t20181029T185446Zw/us-en/_acnmedia/PDF-89/Accenture-Disability-Inclusion-Research-Report.pdf

[11] https://prezi.com/view/9x3lnnT1KBhqV7x4vjyl/

For businesses, diversity and inclusion leads to:

√ Enhanced reputation
√ Improved customer care
√ Improved market share
√ Improved innovation
√ Improved productivity
√ Increased creativity
√ Superior solutions to problems

Skills based approach to hiring

Helping your clients adopt a skills based approach to hiring is a significant step towards inclusivity and diversity.

Rather than seeing a marginalised person (PWD, woman etc.) as a job candidate negatively, as someone that requires extra resources and incur costs, a skills-based approach encourages employers to focus on whether the person has the skills to do the job.

This should be the primary focus. If they have the skills to do the job, their disability or other circumstances should not stand in the way of hiring them.

Does the person have the skills to do the job?

↓

What needs to happen to enable them to work?

↓

Next, decide on how to measure it. What data will you need to collect?

↓

What does that cost?
How long would the return on investment take?

↓

What is the longer term benefit?

Diagram S5-3: Questions to ask for a skills based approach to hiring

Case study

25 year old Ruwanthika hails from Polonnaruwa. Though she has a disability which affects her vision, she overcame many personal and cultural obstacles to complete her standard level education.

Ruwathni completed her Professional Bakery Skills Training offered by the Vocational Training Authority (VTA) Polonnaruwa and began her own home bakery business.
She subsequently started working part time at a local Bakery.

Her employer credits Ruwanthika with bringing new skills to the bakery allowing them to extend their product range and thus increasing their business income. He says, “I am impressed with the skills set that Ruwanthika possesses. When I see her I don’t see her disability, I see her as a multi skilled worker, who could potentially be my business partner. Her disability was not a barrier to me at all compared to her skills set.”

Ruwanthika has not only broken down barriers that can often limit the success of women, and persons with disabilities, she has shaped a local business into a newfound success.

Changing mindsets

Not every employer, owner or manager will be open to employing persons with disabilities or other marginalized groups. They may feel it is easier to run the business if the team is homogeneous - made up of people of the same kind. They may be resistant to hiring new employees who they view as different - such as a different gender, age, race, native language, background or PWD.

As a business coach, you can help your clients to move beyond stereotypes and preconceptions to make choices that will benefit them and their business. Below are examples of common (false) opinions, and the (true) reality.

A client may think:

"My establishment is not accessible so I can't employ a person with disabilities"
False - not all disabilities need specific equipment or adjustments. Furthermore, many technical and financial aids allow you to make reasonable adjustments easily.

"A receptionist with a hearing impairment cannot hold his job any longer."
False - thanks to equipment (amplifier), he can keep doing his job.

"People with disabilities are not hard working"
False - persons with disabilities are as capable, independent and productive as any other employee. They are also work oriented and their enthusiasm motivates other team members.

"People with disabilities need a lot of time off"
False - the rates of absenteeism among PWD is less than other employees. They are highly motivated, engaged and less likely to switch to another employer.

"Hiring someone with a disability doesn't look good for my business"
False - Having a diverse team adds humanity to your organisation that customers admire and appreciate.

"Hiring women into my all-male team wouldn't make a substantial difference".
False - Increasing diversity by hiring women is good for business. Females have a greater understanding of the needs of female customers, and a female presence makes your business seem "safe", for example, solo female travelers feel more comfortable staying at hotels that have female staff. Gender diversity increases collaboration and communication, as well as innovation.

"Younger people are harder to manage."
False - young people have a learning mindset and do not have old habits that are hard to break. They are comfortable adopting the use of new technology and their presence can attract younger customers.

Remember

Building inclusive practices in an organisation will take time; it is a process of change and resistance is to be expected.

Dealing with Resistance

When working to promote equality and inclusivity, you should expect to encounter resistance, and prepare ahead for this. It may occur in any setting, from an individual or a group, male or female. The resistance will also vary depending on the issue, typically resistance to hiring women is not the same as resistance to hiring PWD.

Types of resistance

Resistance ranges from passive - aiming to block change to active - an aggressive opposition, and anywhere in between. Below are some examples of the range of resistance:

PASSIVE

Denial	“We don’t have a problem”
Disavowal	“It’s not my job to take action about this”
Inaction	“Hiring more women isn’t a priority right now”
Appeasement	“Yes, we agree we should do something (...one day)”
Appropriation	“We would love to hire more women, if they were suitably qualified”
Co-option	“What about men’s rights? They need employment too”
Repression	“We tried to hire more women, but they turned down our offers”
Backlash	“Women who work outside the home deserve all the abuse they get”

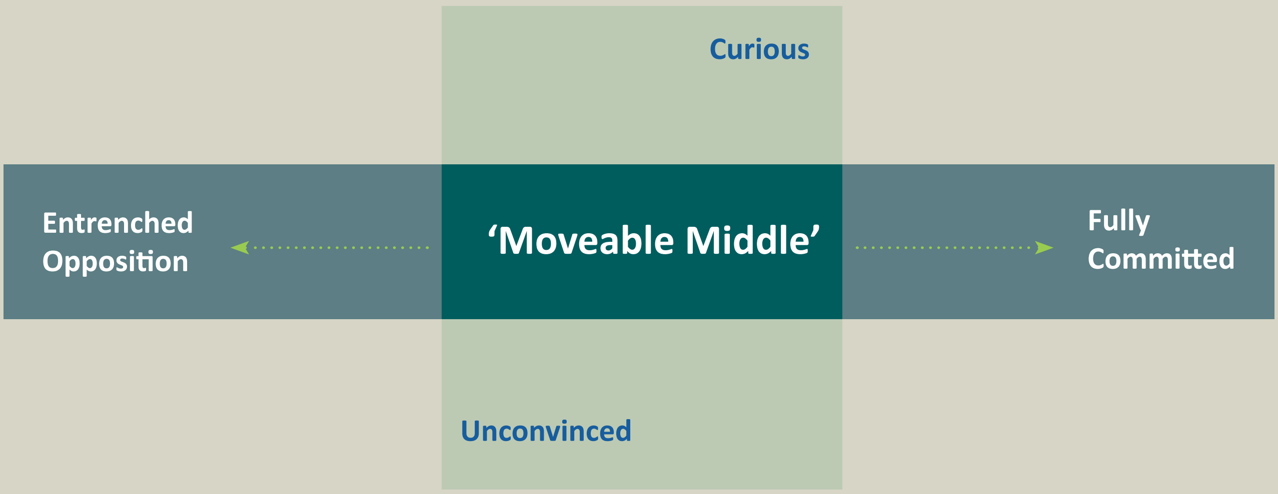
ACTIVE

Gender equality means men letting go of privilege. Resistance means that people cling to social norms - unwritten rules about how to behave in society, such as a woman’s place being in the home, or men not being responsible for housework. Often these kinds of attitudes are so subconscious that we are not even aware of them.

Spectrum of resistance

When dealing with clients, consider where they are on the spectrum of resistance. Those with entrenched opinions are the least likely to change their views. Gender equality initiatives internationally have found that change can begin at the 'moveable middle', where people are either unconvinced or curious. Only once the social norm changes, will those with entrenched opposition consider shifting their views.

The Spectrum of Resistance



Source: VicHealth (En)countering resistance https://www.vichealth.vic.gov.au/-/media/ResourceCentre/PublicationsandResources/PVAW/Encountering-Resistance-Gender-Equality.pdf

Managing resistance to gender equality

Follow these seven steps to manage resistance when dealing with gender equality and inclusivity:

1. Don't be surprised, resistance is to be expected.
2. Understand the type of resistance and who it is coming from.
3. Tailor your response accordingly
4. Be willing to listen. When people can talk about their own beliefs openly, including biases, they are more likely to be open to hearing other sides.
5. Focus efforts on those who can be influenced, the 'moveable middle'
6. Share stories and personal accounts to help people connect to the concepts on an emotional level, not just rationally.
7. Highlight the benefits of equality. Address myths and misinformation.

Resistance to PWD

When dealing with issues of equality for persons with disability, resistance can look different. Often real resistance appears when finances are involved. Many people quickly grasp that PWD deserve access and equality, but push back at the idea of having to actually change the status quo, especially when it can be expensive and take up precious resources.

For example, a restaurant owner might be happy to welcome PWD as customers, but does not want to spend any money on building a ramp or installing handrails to make the building more accessible.

Or, a hotel manager says she is open to the idea of hiring staff with hearing impairments, but when she learns of the cost of teaching sign language to the team, she decides not to proceed.

Remember

If the barriers (physical, attitudinal, societal etc.) were not created in the first place, it would not require money to undo them.

If you work with clients who are setting up a new business, or about to make changes to an existing one, encourage them to think about how they can make their practices (for customers and employees) more inclusive.

Supporting Your Clients

If you have a client who has a disability, be aware of the barriers they may be facing when trying to set up or improve their business. These may include:

- Limited knowledge of market demand, which leads to poor selection of activity / product / service
- Difficult accessing supplies / businesses located far from home.
- Increased cost for transport.
- Barriers to accessing business services e.g. banks and official buildings not having accessible infrastructure
- Poor access to credit. Lack of personal savings
- Lack of managerial skills
- Poor social acceptance towards them as business owners

If your client is a women, they may face the following barriers when setting up a business:

- Lack of personal capital
- Difficulties accessing finance
- Lack of self-confidence and low willingness to take risks
- Lack of language or IT skills
- Difficulty balancing family and business life, particularly with young children
- Resistance from family
- For tourism businesses: the need to get use to foreign culture and flack of family acceptance of working in the sector

Example: barriers to women

A young woman with a hearing disability has completed her NVQ qualification in Beauty Culture and is now running a home-based salon and generating an income independently. However, her parents do not think she should be independent (or she can be independent). They both think she should remain home-based in the future and not take the risk of being employed away from home.

Do no harm

As discussed in Section 2: Basics of Business Coaching, do no harm is a fundamental principle of coaching. When dealing with women and PWD follow the below practices.

Do	Don't
✔ Arrange to meet at a convenient time for the client. Don't show up unannounced.	✖ Don't be overly familiar or sit too close. Don't call outside of working hours unless specifically agreed.
✔ Be polite and decent in your communication, body language, dress code etc.	✖ Do not encourage the client to talk about personal matters (unless connected with the business)
✔ Find a suitable place to meet, this may need to be visible to family members / staff.	✖ Don't meet or set up coaching sessions in inappropriate locations.

Families can be highly protective of women and girls and feel it is safer for them to remain in the domestic space. This can adversely affect women's self confidence and capacity development. They may require more support than males in areas such as networking, risk taking and self promotion.

Overcome barriers

As a business coach, it is part of your role to help clients identify and overcome barriers to reach their goals.

The following 4 step process may help you and your client think about ways to do this.

1. Identify the essential functions of the business / role
2. Identify the limitations the individual is facing
3. What essential functions may be affected?
4. What accommodations could be made?

Case Study

Scenario: Mr Yasaru has been a tuk tuk driver for 10 years. He now wants to become a tour guide, he has lots of local knowledge and is excited about showing tourists the beautiful area where he lives. Mr Yasaru has mobility issues and cannot walk. He normally uses a wheelchair, his tuk tuk is specially adapted for his use.

- **The essential functions of a tour guide are:**
- Pick up all guests and greet them promptly at scheduled tour time with a warm smile
- Determine if guests have physical restrictions that should be considered
- Drive guests to the places of interest
- Provide information about touristic sites in an engaging and clear manner
- Interact with guests and answer questions
- Arrange regular cleaning and maintenance services for the vehicle
- Apply all safety, security protocols and first aid that need to be complied

The limitations Mr Yasaru experiences are:

- He cannot walk
- He can sit and work for up to 6 hours
- He uses a wheelchair

The essential functions that may be affected, and possible accommodations:

Essential function	Possible accommodations
Pick up and greet guests	Provide prior information to guests about his mobility limitation. Greet guests whilst seated in his tuk tuk.
Drive guests to the places of interest	Conduct only half day trips (less than 6 hours)
Provide information about touristic sites	Present each tourist site verbally, before letting guests visit on their own. Provide hand drawn maps of the sites with key points of interest included.
Interact with guests and answer questions	Give guests his mobile number (or provide a mobile for guest use if they don't have a local SIM card). Allow them to call during their walk around, and answer questions again when they return to the vehicle.

IDENTIFY BARRIERS

- What are the person's limitations?
- What do they affect?
- What barriers are they facing (internal and external)?

IMPLEMENT SOLUTIONS

- What reasonable adjustments can be made?
- What support is needed?
- What are the positive outcomes expected?

Promoting Inclusive Practices

Business coaches have the opportunity to help their clients adopt more inclusive practices in their businesses. This includes creating an inclusive environment for both employees and customers.

True inclusion removes all barriers, discrimination, and intolerance. If it is practised properly in the workplace, everyone will feel included and supported.

Qualities of an inclusive environment:

- Mutual respect among all players
- Individual empowerment
- Value and appreciation for team members
- Trust and vulnerability
- Safety for everyone
- A culture of innovation

Coaches can help their clients to:

- Address and support staff in all their diversity
- Facilitate an inclusive and collaborative workplace culture
- Commit to advancing gender equality and diversity alongside / while responding to business challenges and opportunities
- See diversity as a strategic advantage

Aiding your clients to gain greater self-awareness and insight into their own beliefs about marginalized people can help them to succeed. Positive benefits include a stronger sense of self and an increased understanding of how to manage relationships effectively.

UNDERSTAND VIEWPOINTS

- What do they think?
- Why do they think that way?
- How resistant are they to change?

CHALLENGE PERCEPTIONS

- Which stories or examples can you share to challenge / change this?
- What are the expected benefits?
- What are the easy wins?

Case study

Mohamed is hearing and speech impaired. He hails from a farming family in Arugam Bay. Four of his five member family are afflicted by the same impairment as Mohamed, and are challenged in completing their education and obtaining employment. The family has so far existed on their father's meagre earnings as a farmer. Ilhas has had an abiding interest in tourism, as it is the main livelihood for most residents of Arugam Bay. His passion, however, is cooking.

Mohamed completed an international cookery course over three months and found employment at a resort. The owner initially had misgivings about Mohamed's ability to interact with guests but decided to give him a chance. He was hired as an assistance cook and a housekeeper.

Mohamed has proven his worth. He is diligent in completing the work assigned to him and also interacts with staff and guests well. Not only is Mohamed a conscientious employee, he is not shy to share his ideas for development with the owner. Wanting to make his workplace as welcoming as possible, the owner has started learning sign language. Mohamed has proved that despite a disability he could do his job as well as any other. For his part, the owner has decided to hire more differently abled persons, now that he knows that a disability is not an impediment in getting a job done.

Steps to promote inclusivity for PWD

1. **Start a conversation** - ask the question, 'Are persons with disabilities being included in your company, and in your services / products?'
2. **Share information** regarding disability-inclusive practices, case studies and what other businesses (especially competitors) are doing.
3. **Share success stories**
4. **Encourage your client,** and others in their business to attend training
5. **Review your client's processes**, operations, recruitment etc. how can they be made more accessible for PWD?

Start with easy small wins. These are practical, small steps that can be carried out quickly to build confidence and demonstrate that progress is possible. For example:

- Provide a braille menu in the restaurant
- Train members of the front office team in basic sign language
- Update the website font to an accessible font
- Make company marketing materials easy to read: large size with good colour contrast

Reasonable accommodation

Reasonable accommodation is the provision of support, modifications and/or adjustments that meet the individual needs of PWD to ensure they enjoy a nd exercise all human rights and fundamental freedoms on an equal basis to others.

While some changes, such as installing access ramps or handrails to a building will cost money, other changes are free and still make a significant difference. Examples of cost-free workplace accommodations include: scheduling flexibility, allowance in dress code rules, or allowing someone to sit (or stand) when another position is usual.

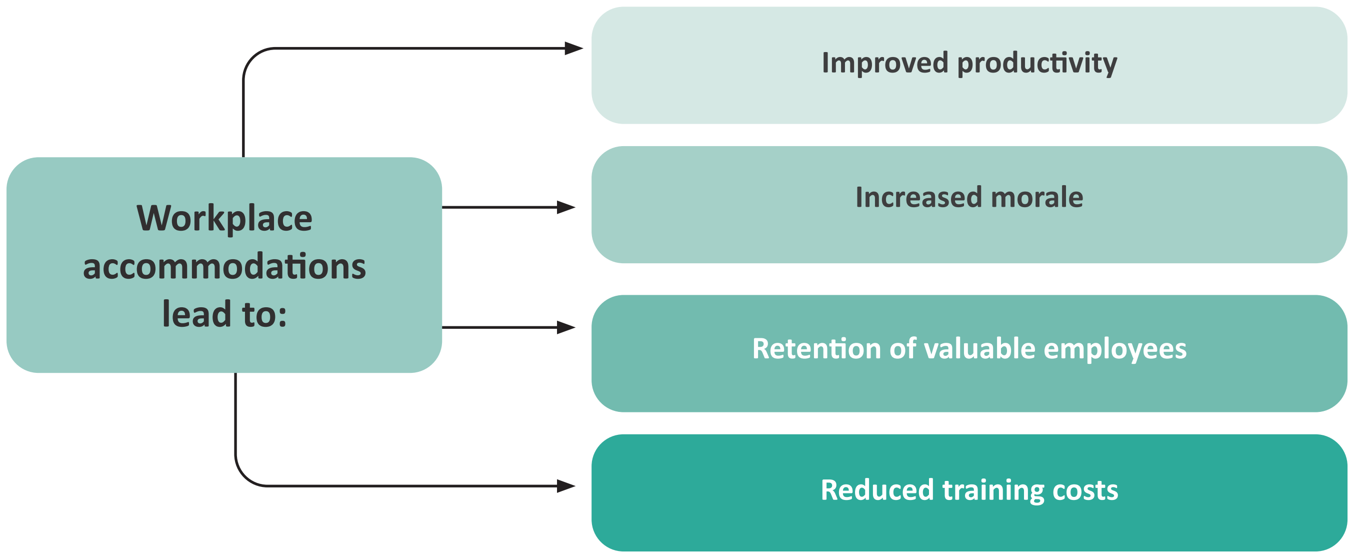


Diagram S5-8: Benefits of workplace accommodations

Not all persons with disabilities (or all people who have the same disability) will require the same thing. Reasonable adjustments for employees may include:

- Modified work schedule (hours, days, shifts, full or part-time work, or starting and ending times)
- Providing adequate breaks
- Maintaining a good relationship with PWD's family members in case of any issues.
- Providing a sign language interpreter or a reader when necessary at work for gatherings such as meetings and training sessions.
- Making sure all areas and equipment the employee needs to use are accessible.
- Providing or modifying equipment / devices that are necessary to perform the essential function of the job.
- Adjusting training materials or policies for an employee with a disability.
- Ensuring adequate monitoring and assistance is available to them until they are familiar with the establishment and their role.

Steps to promote gender inclusivity

1. **Start a conversation** - ask the question, 'Are women being included in your company, and in your services / products?'

2. **Share information r**egarding gender inclusive practices, case studies and what other businesses (especially competitors) are doing.

3. **Share success stories**.

4. **Encourage your clien**t, and others in their business to create a safe working environment, with zero tolerance for sexual harassment.

5. **Review your client's processes,** operations, recruitment etc. how can they be made more inclusive for women?

Practical steps that have proven to be effective include:

- Provide equitable and safe jobs for women
- Providing safe transport home for women working evening / night shifts
- Creating safe accommodation on site for women
- Using female role models at events in leadership roles
- Enforce strict rules against sexual harassment. Where there is a known risk, assign women to work in pairs, as a solo woman is at greater risk.
- Actively recruit for gender balance
- Provide support for working parents, such as childcare and flexible arrangements
- Review job descriptions and reporting lines so women have a greater role in leadership and can build their experience in management
- Commit to 3-5 meaningful actions per year (start small and build on progress)
- Take an 'if not, why not' approach to flexible working arrangements. Justify why it can't be done, rather than why it should be
- Stop the practice of classifying job advertisements as 'male' or 'female'. The best candidate for the job should be hired, regardless of gender.
- On the job training or short courses with flexible time commitment
- Ensure performance management (promotions, pay rises etc.) is transparent

Do	Don't
✔ Have a no tolerance policy against sexual harassment.	✘ Don't be overly familiar or sit too close.
✔ Be polite and decent in all your communication, body language, dress code etc. Ensure other team members do the same.	✘ Do not encourage staff to talk about personal matters (unless directly connected with the business)
✔ Find a suitable place to hold meetings, this may need to be visible to other staff.	✘ Don't meet in inappropriate locations or settings that could feel uncomfortable.
✔ Take a skills based approach to hiring.	✘ Classify jobs as male or female in advertisements.
✔ Develop a strategy to get regular feedback from staff on working conditions, including the working environment.	✘ Ignore safety or sexual harassment complaints. A safe working environment is important for all.

Remember

Remind your clients of the proven business benefits of being an inclusive and diverse employer.

Making online meetings inclusive

Prepare well:

- Ask if anyone has accessibility requirements in the meeting invitation
- Share the agent and any content as far in advance as possible.
- Make sure the agenda has breaks, and stick to the time limit.

On the call:

- Do a role call so everyone knows who is in the call.
- Explain accessibility features, remind people of shortcuts, such as a mute/unmute.

- Keep videos on
- Go on mute if not talking (background noise can be very distracting for all attendees)
- When you show a presentation, describe what's happening on screen

In addition:

You might not be aware of of someone having a cognitive disability, unless they choose to disclose it, so it's always good practice to:

- Avoid jargon and acronyms
- Practice basic functions. Turing video on/ off, mute people, share screen, troubleshoot problems for others
- Slow down and create pauses. This gives note takers, people with slow internet bandwidth, and those using captions or interpreters time to catch up.
- Keep meetings short and have regular breaks

Example Introduction

"Hello everyone my name is Piyumi.

Today we are talking about performance. The acronym you might hear a lot is KPI. This stands for key performance indicator.

I'll just remind everyone about the accessibility features of this meeting. We have a closed captioning service. To activate it, click on the CC button at the bottom of the screen.

Today on the call we have Sandamal, Alex, Davina and Shashini.

Can I ask please that you all go on mute unless you're speaking, otherwise it's distracting for other attendees.

If at any time you have a question, you can put it in the chat box, or virtually raise your hand by clicking the raise hand button at the bottom of the screen.

Now, I'll hand you over to our expert, Sandamal."

Remember

Reach out to people who have told you they have accessibility needs. They are the experts at what they need and will tell you what you need to know.

Section 6

Communication Skills

Introduction

Words are powerful. We have all been in situations where something we said was misunderstood. Perhaps it caused offense, or led someone to take an action different from our intention. That was poor communication. As a business coach, effective communication must be the foundation of your coaching practice.

Competent communication underpins your ability to understand your client and their business, to set effective goals, to monitor and provide feedback and to form a productive coaching relationship.

This section will outline the communication skills you need as a business coach, including active listening, powerful questions and direct communicating. It also covers non-verbal communication (body language), and common communication traps you should avoid if you want to facilitate understanding.

What is Effective Communication?

Effective communication takes place when the speaker communicates a message to a listener (or reader) and a) that message is understood as the speaker intends, and b) it produces the desired response.

The following table introduces communication skills you will need to master as a coach.

Skill	Description
Be self-aware	Know when to be quiet Give the client opportunities to speak and ask questions Be patient and sincere Be open and straightforward Admit mistakes be flexible and prepared to change your position
Use clear and appropriate language	Speak clearly Use a level of language appropriate for the listener Do not use unnecessarily complicated language Communicate in a variety of ways to help the client understand Adopt a pace that suits the client Use humour appropriately
Practice active listening	Be a good listener Ask questions to check your understanding Ask questions to check your client's understanding Show that you are listening by making appropriate verbal and not verbal responses

Skill	Description
Remain neutral	Do not be critical if the client doesn't understand what has been said Do not confuse the client by giving too much information at once Ask the right questions to guide your client

Active Listening

A coach's ability to listen is one of the most important skills they use.

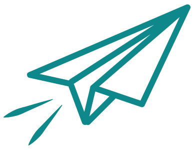
An effective coach is an active listener. This means they ask questions, summarise, check their understanding, use non-verbal communication signs and listen without judgement.

Active listening requires full and active engagement, rather than passive hearing. It is a conscious decision to pay attention and understand what your client is saying not only through their words but also their body language and tone of voice. When you practice active listening you can also obtain information from what a client is not saying.

Active listening is useful for more than just understanding. It also demonstrates to the speaker that you are listening. It is a powerful communication technique used by leaders and is important for a business coach to master. When coaches (and people in general) listen well, others tend to listen to them more and they become more influential.

In coaching, active listening:

- Demonstrates that you are respectful and non-judgemental
- Demonstrates that you are paying attention to your client
- Helps to build trust, rapport and understanding with your client
- Helps probe issues at a deeper level - it can reveal opinions, values and limiting beliefs that may be the key to helping your client move forward



Top tip:

When you practice active listening, listen accurately and critically.

- Listen with sensitivity, picking up on what is not being said, as well as what is. Challenges people face, particular barriers, are often not spoken.
- Listen with awareness of power imbalances and inequalities - do not make assumptions about someone's experience.

Active listening skills and tools:

Active listening involves both verbal and not verbal responses. Develop your active listening skills in the following seven areas.

Silence

Silence is a powerful tool for coaches. People have a natural tendency to fill gaps in conversations, many feel uncomfortable with silence. As a coach, learn to be comfortable with silence. Hold back and let your client step forward to speak. Do not interrupt. Listen without making judgements and pay attention.

Ask relevant questions
Asking relevant questions that relate to what your client is saying at appropriate times lets your client know you are listening and to ensure you understand what they are trying to communicate. Effective coaching questions are discussed further later in this section.

Reflect
Identify words or phrases that stand out to you, or are used repeatedly by the client. Repeat them back when you speak. This shows you are listening and recognise what is important to them. Be conscious not to do this too frequently or it may appear unnatural.

Clarify
Get the client to share examples or explore what they have said further. This helps you gain a deeper understanding, and helps them demonstrate their knowledge and awareness. Ask clarifying questions such as “you mentioned earlier that your priority was getting new customers, now you have mentioned that reducing costs is the most important thing…which is more of a priority right now?”

Affirm
Using affirmation such as ‘it sounds like you handled that well’ is a good way to improve the self-confidence of your client and to keep them in a positive frame of mind.

Summarise
From time to time summarise what the client has shared with you, using their choice of language, to indicate you heard and to demonstrate the progress made in the discussion. Consider saying “Let me summarise and check my understanding, you … “

Body Language
Non-verbal active listening techniques include making eye contact, adopting positive facial expressions such as smiling, nodding affirmatively and matching your posture to your client’s. Noticing inconsistencies between what your client is saying and their non-verbal communication may provide useful insight into their true feelings. Using body language to build rapport and communicate effectively is discussed further later in this section.

Listening habits to avoid

"There is a difference between truly listening and waiting for your turn to talk."
Ralph Waldo Emerson.

Most people listen with the intent to reply. As a coach you must listen with the intent to understand. This can be easier said than done. Our minds often wander during a conversation, get distracted or jump to formulating the next thing we want to say. Review the list of bad listening habits below, do you recognise any?

- Thinking about what you will say next or how you will reply, rather than listening to what the speaker is saying
- Interrupting, even if there is a long pause, allow the speaker to finish their sentence
- Jumping to conclusions or assuming you know what is being said
- Finishing the speaker's sentences for them
- Changing the subject abruptly
- Failing to respond
- Rushing the speaker
- Getting distracted by other thoughts

How to improve your listening skills

Becoming an effective listener requires practice:

1. Prepare beforehand - set aside time before your coaching session to clear your mind
2. Tune in to key words and phrases, don't try to focus on everything
3. Learn to notice your internal dialog - are patterns to thoughts that distract you, or triggers that make you want to interrupt
4. Learn to create good notes that are succinct and meaningful to you. Note taking shows you are paying attention, but do so in moderation
5. Resist mental distractions
6. Notice verbal and non-verbal cues from the speaker
7. Learn to just listen - don't judge, interrupt or craft replies in your mind

Be aware that many of these listening attributes (positive and negative) can occur subconsciously. Pay attention and notice your behaviour in conversations. Cultivate the active listening skills in your conversations with clients, while avoiding the negative habits.

In a similar manner, pay attention to how your client listens when you speak. If they are staring over your shoulder or fidgeting it can be a sign that they are not paying proper attention. Consider switching up your topic, asking a question or changing to a new activity to re-engage your client.

Common signs someone isn't listening include:

1. Dead eyes
2. Wandering gaze
3. Closed body attitude
4. Body angled away
5. Fidgeting
6. Yawning
7. Failing to respond
8. Talking over you or interrupting

Remember

It is not possible to listen well and do other things at the same time. Give the speaker your full attention.

Powerful Questions

The art of questioning is a significant part of active listening. Consider the following two questions, which one are you more likely to give a detailed answer to?

1. Did you have a good day today?
2. What was the best part of your day?

Both will tell you about the speaker's experience but in different ways. A typical response to question one is 'yes' or 'no', whereas question two invites a long answer describing an experience. Asking the right questions can make all the difference.

As a business coach, questions can help you to focus your client's attention on a particular issue that you want them to think about in detail. They are the means to explore ideas, encourage participation, and delve into processes, views and details that may not normally be considered.

Coaches ask questions to check their own understanding, and to check that the client has understood what's said correctly.

Why is questioning important?

It is important to gather as much information about your client as possible. Powerful questions help you do this, but they also go beyond information gathering. Using the right questions at the right time will:

- Help you elicit information from your client
- Focus your client's attention
- Enable them to look at their situation from another perspective
- Inspire your clients to think, reflect and create answers they believe in
- Foster commitment
- Empower them to act on their ideas

The toolkit includes a library of coaching questions that you can use for various purposes in your coaching.

Types of questions

Open	Closed	Probing	Reflective	Hypothetical	Paraphrasing	Leading

Open questions

Open questions encourage the client to speak so you can gather the necessary information. They can't be answered with one word and generally require more thought to anwer. They often start with what, where, how, when, why, which

Useful for: finding out more information, to draw out opinions, feelings and detail. Creative or critical discussion

Examples:
- How did you keep to the timeline?
- What's going well?
- Who would you feel comfortable approaching for advice?
- What does success look like?

Closed questions

Closed questions invite a one word answer, such as ‘yes’ or ‘no’. They typically start with ‘do you…’, ‘have you…’, ‘can you…’, ‘would you…’. They are easy and quick to answer and are effective when used early in conversations to encourage participation.

Useful for: obtaining agreement. Getting quick answers. Helping the client to formulate an answer when they are not able to expand on it independently.

Examples:
- Did you talk to your team?
- Would you like to meet at 3pm?
- Do you have the survey results?

Probing questions

Probing questions dig deeper and provide more information about the subject under discussion. They can clarify something already said, or uncover detail that may have been overlooked. Asking probing questions enables you to go deeper and uncover the root causes of a situation. They are a more articulate equivalent to asking ‘why’ multiple times.

Useful for: avoiding misunderstandings, discovering more information (especially from a reluctant speaker), building rapport. Be careful not to overuse them as this may seem interrogating.

Examples:
- Could you be more specific?
- To what extent...?
- Who is involved?
- What does that mean?
- Tell me more about…?

Reflective questions

Reflective questions are often used to check and clarify understanding. They reflect back to the respondent what they just said, often including an emotional aspect. This shows you are paying attention and allows the client to feel heard. It also gives your client an opportunity to reflect and adjust what they said, or explore their situation further.

Useful for: checking understanding, encouraging greater self-reflection, building rapport

Examples:
- Client: “I feel frustrated with my supplier”
- Coach: “What is this "frustrated with my supplier" experience like?”

Hypothetical questions

Hypothetical questions are used to test knowledge and understanding, and to gauge how the client might act in a possible situation.

Useful for: getting your client to think about new ideas, understanding how they approach situations and problems, learning the limits of their knowledge and where they may benefit from advice / training.

Examples:
- Tell me what would you do if X happened?
- How would you respond if Y happened?
- What would happen if … ?

Paraphrasing questions

Paraphrasing questions are similar to reflective, but use different words to your client. They are a good means of checking your understanding of what your client has said, however, they can also misinterpret the meaning of what the client is saying.

Useful for: checking your own understanding, getting clarity. Use carefully, consider reflecting using the same words rather than paraphrasing.

Examples:
- Client: "It's not possible to change the bathroom fittings, there's no way I can afford that".
- Coach: "So you're saying that cost is the biggest barrier to making this change, is that correct?"

Leading questions

Leading questions subtly prompt the respondent into agreeing with the speaker. Remember that one of the coaching behaviours is to remain neutral. It is better to ask 'how did you find working with that team' rather than a leading question.

Useful for: steering a conversation towards an outcome that serves your interest. In coaching, use with caution.

Examples:
- Do you have any issues with this timeline? (prompts a negative response)
- Did you enjoy working with the sales team? (prompts a positive response)
- The project is going well, isn't it? (prompts a positive response)
- Don't you think you should have…? (prompts a positive response)

Remember

Sometimes you may ask a leading question unconsciously. Pay attention when you do this. Powerful questioning is a skill. You will develop more control over your words as your coaching practice advances.

Direct Communication

Asking powerful questions is not the only way to help your clients in a coaching conversation. Direct communication is another powerful tool for coaches to use. It provides the flow in the conversation. It is simple to think of direct communication as all the parts of a conversation that are not questions. Good direct communication allows the client to see their situation as it really is and to share thoughts without judgement or criticism.

Why use direct communication?

Direct communication is clear, direct, precise, and succinct. When you use direct communication you value both your client's time and your own. The opposite of direct communication is indirect communication, where true meanings and intentions are hidden and require interpretation. In coaching, direct communication helps the client to see other perspectives and possibilities about their situation.

Direct communication is not:

- Making assumptions
- Putting words in your client's mouth
- Assuming you know what they should be doing
- Wasting time getting to the point
- Discussing topics that are irrelevant to the client's development

Direct communication skills:

Coaches should communicate in a manner that has the greatest possible positive impact on their client. This includes being reassuring, helpful, encouraging and respectful.

Coaches should:

- Be clear and succinct. Get to the point and stay on point
- Be respectful and professional at all times
- Use contextually and culturally appropriate language. Avoid "jargon"
- Make clear requests, and respond to requests directly
- Use words to provide clarity for clients. Re-word if they are uncertain of the meaning

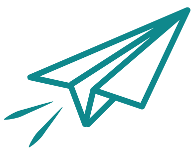
- Ensure clients are aware of the meeting's objectives
- Remember that coaching is about the client, not the coach. The communication should reflect this
- Use metaphors and analogies to create new understanding / awareness and inspire clients to explore more
- Ground conversations in present moment awareness and data to create immediacy and relevance for the client

An effective coach will use the power of their words to illustrate points in a way tailor-made to suit the client.

Tips for direct communication

Some people are wary of using direct communication for offending their client, hurting their feelings or the risk of being wrong. It can sometimes feel like an unnatural style of talking and without careful choice of language the directness can backfire.

Remember the below tips:



1. When using metaphors / analogy, create from observation (what you have learnt from the client), not from your own view point
2. Allow more space and silence for the client to reflect and respond
3. Share observations at the time, do not hold back or delay them for later
4. Maintain neutrality and be non-judgemental
5. Do not soften your message. Soften your words, but keep the message direct. Consider pairing your direct message with the following phrases:

   - It sounds as though…
   - … How does that come across?
   - … What is it like for you to hear that?
   - … What comes to your mind when hearing that?
   - … What is true about that?

Remember

You can still be honest and direct without crossing the line into bluntness. A thoughtful choice of words is crucial to avoid offense. Soften your words, but retain the direct message. For example:

Poor direct communication: “I hear a contradiction” (may cause defensiveness)

Better direct communication: “Something is occurring to me that is not adding up. I hear a contradiction.”

Body Language

Body language is a huge part of the way we communicate. It is a vital element in building rapport with others. Between 70 - 90 percent of our communication is estimated to be non-verbal. Scientific studies have shown that students learn more from teachers who use gestures, and teachers are more effective when they pay attention to student’s body language. When words and body language are in alignment, the message given out becomes clear.

What is body language?

Body language is the non-verbal communication that happens with our body. This includes facial expressions, posture, gestures, eye movement, touch and the use of space.

Imagine you are sitting across the table from two people. You are giving them important instructions that they need to remember. Person A is tapping the table impatiently and looking over your shoulder out the window. Person B is looking at you, sitting still and nodding occasionally as you speak. Which of the two do you think is paying more attention? The answer of course is Person B.

We naturally sense the body language of others. Non-verbal communication influences what we hear the speaker say and the way we understand it. It can enhance, or detract from the message given out.

Body language is at the heart of communication, yet so much of it happens without us being consciously aware of it.

As a coach you need to consider your own body language and pay attention to the signs your client is giving off. Being aware of their non-verbal communication will help you become a better listener and enhance your coaching relationships.

Using body language to build rapport

Body language plays an important part in building rapport. When two people get on well they will naturally mirror each other's body language, such as sitting in the same position or using similar hand gestures. The opposite is true when there is a negative feeling between two people, often their body language will show this even if their words do not.

As a coach you can subtly match your body language with your client to build rapport, this is called mirroring. For example, if they lean forwards with their elbows on the table, you can do the same. Be careful not to mirror too much, it should be subtle actions that your client will not notice consciously.

Remember, body language works both ways:

1. Your body language tells others what you think, feel and mean
2. Other people's body language tell you what they think, feel and mean

Tips on using open body language:

- Maintain eye contact to show you are listening
- Clasp your hands rather than crossing your arms
- Lean into the conversation to show engagement
- Sit and stand with an upright posture to show leadership and confidence
- Learn to control your facial expressions
- Be particularly aware of what your eyes and mouth are saying. Your ‘concentration’ face may look like disapproval to the other person
- Ask for feedback from friends / colleagues on your unconscious body language habits

Body language do’s and don’ts

When listening - and communicating generally - it is important to maintain positive body language to show your client you are engaged, paying attention and value what they have to say.

Do	Don’t
✔ Maintain eye contact	✖ Purse your lips (a signal of distress)
✔ Pay attention to your facial expressions	✖ Cross your arms (a signal of defensiveness)
✔ Smile often	✖ Roll your eyes (a sign of disbelief)
✔ Sit facing your client	✖ Clench your jaw (a sign of anger)
✔ Use hand gestures	✖ Physically turn away (a ‘cold shoulder’)
✔ Nod affirmatively and make small gestures to show you are listening	✖ Tap the table, your pen, or foot (a sign of impatience)
✔ Mirror your client’s body language	✖ Frequently shift your position or fidget
✔ Pay attention to your unconscious habits	✖ Yawn or let your eyes wander

Remember

Body language is not an exact science. Sitting with arms crossed may be a sign of defensiveness, but not always. It can also mean the person wants to feel more secure, needs to physically support themselves because they are tired, feels cold or it may simply be their normal way of sitting

Communication Traps

Communicating effectively as a coach is a skill that you will develop over time. As a new coach, there are some common pitfalls to look out for:

Questioning

- Asking too many leading or closed questions
- Not asking enough probing questions
- Asking questions that imply your own views, rather than asking for your client's
- Sticking to a prepared set of questions, rather than being flexible with the conversation

General communication

- Being judgemental
- Giving advice at inappropriate times
- Sharing your own knowledge rather than searching out your client's knowledge
- 'Spoon feeding' your client with information and instructions
- Not obtaining commitment from your client
- Using too much jargon or technical language your client may not know
- Allowing your emotions to influence your communication. Remain neutral
- Going on and on. Give your client space to ask questions

Style of speech

Remember that as a coach you are there to support your client in solving their problems. The following styles of speech are unhelpful:

Discounting: "Cheer up, it'll work itself out…"

Lecturing: "How many times do I have to explain that…"

Threatening: "This is the last time I will…"

Preaching: "Someone in your position ought to know better than to…"

Neutralising: "I don't mean to say you're wrong but…."

Remember

An effective coach will help a client become more aware of their thoughts and behaviours, so they can see alternatives that might serve them better in future. Communication is a big part of this. Engage in active listening, use powerful questions and direct communication to invoke self-awareness and reflection in your client.

Be self-aware

If the overall conversation you had with your client, or a particular question in that conversation, did not result in the outcome you expected, reflect on why this may be. Ask yourself the following questions:

1. Did you ask the question(s) in the wrong way?
2. Could your words have been misinterpreted? How?
3. Was it an appropriate type of question?
4. What non-verbal signs was your client showing?
5. How could you do it differently next time?

Remember that a coaching relationship is a partnership. No matter how skilled you are as a business coach, some aspects of communication are outside of your control. If your client is not interested in hearing what you have to say, your words will fall on deaf ears. Section 12: Advancing as a Coach explores how to overcome communication and other challenges in the coaching relationship further.

Communication Do’s and Don’ts

Do	Don’t
✔ Use active listening	✖ Get distracted
✔ Use powerful questions	✖ Assume you know the client’s answers
✔ Use a level of language appropriate for the listener	✖ Use unnecessarily complicated language
✔ Be sincere and honest	✖ Make unnecessarily complicated statements
✔ Communicate concepts in a variety of ways to help clients understand	✖ Refer to unnecessary abbreviations or technical language (“jargon”)
✔ Ask questions to check the client’s understanding	✖ Be critical if the client doesn’t understand
✔ Use positive body language	✖ Use leading questions
✔ Be clear	✖ Use negative or threatening body language
✔ Be patient	✖ Rush the client to make decisions
✔ Allow the client time to think and reflect	✖ Soften or dilute direct communication
✔ Remain neutral	✖ Be judgemental or criticise
✔ Be flexible and adaptable	✖ Give too much information at once
✔ Adopt a pace that suits your client	✖ Interrupt
✔ Know when to be quiet	✖ React negatively or get frustrated

Section 7

Building Successful Relationships

Effective coaching rests on strong relationships. The relationship between business coach and client is built on trust, respect and rapport.

In this section you will identify what steps need to be taken in order to develop a solid foundation for a mutually beneficial coaching relationship. These include being non-judgemental and demonstrating empathy.

A strong coaching relationship is also rooted in clear expectations and mutual understanding. This section covers why it is important to set expectations and how you can establish boundaries with a new client from your first coaching session. This includes how to structure a clear and professional Coaching Agreement.

Develop Rapport and Trust

Rapport and trust are at the root of an effective coaching relationship. Rapport is feeling that you and your client are on the same wavelength, that you really and truly understand them and that by entering their world you can help them move forward. Rapport is the gateway to trust, which is the glue that holds relationships together. It enables your client to feel safe and supported.

The process of building both rapport and trust starts from your very first interaction with your client, and should be continued throughout the coaching relationship. Both are essential for creating a safe, supportive environment in which the coaching journey can take place.

Why is rapport important?

When you have good rapport with someone you feel that you are on the same page.

Imagine you feel sad and are talking to someone using a soft, slow voice. The other person responds loudy and energetically. How would that make you feel? It is unlikely to make you feel heard or understood. You may not want to continue the conversation further. This is the opposite of good rapport.

Part of good rapport is making people feel ‘matched’ with you, that you understand them and can walk in their shoes. This is especially important in the coaching relationship.

Good rapport enables clients to:

- Feel relaxed and comfortable with their coach
- Feel they are in a safe space to share information and open up
- Let go of personal barriers and fears

How to build rapport

To build rapport:

1. **Ask questions** to get to know who your client is as a person, what is important to them and what are their underlying beliefs.
2. **Use active listening** techniques to listen and show that you are listening
3. **Provide affirmations** by relaying back your client's strengths and skills
4. **Mirror and match**. When people are in a state of rapport there is harmony in their behavior. You can mirror and match (not copy) body language, and particular words and phrases your client uses. Match your tone of voice, breath rhythm and energy levels to be even more in sync.
5. **Empathise** (see below)
6. **Be warm and personable**, smile and make eye contact

Why is trust important?

Trust is the foundation upon which the coaching relationship rests. Without trust, you cannot have the honesty that is so important for every stage of the coaching process.

A high-trust environment can improve:

- Relationships
- Motivation
- Collaboration
- Innovation and creativity
- Engagement
- Performance and results

The opposite is true for low-trust environments where relationships, and consequently business performance, can be impared by suspicion, cynicism and the withholding of information.

Trust factors into the coaching relationship in multiple ways:

Who	What they need to trust
The client	1. That the information they provide they share will be treated with the strictest confidence. 2. That the coach is competent, and that they should follow their advice and guidance
The coach	1. That the client is serious about engaging with the coaching process 2. That the client is providing honest and accurate information 3. In their own coaching skills 4. In the coaching process

How to build trust

Building trust requires people to move outside their comfort zone. It is the responsibility of the coach to inspire trust in a purposeful and proactive manner. If you act in a trustworthy way, your client is more likely to do the same.

To build trust:

1. Be sincere in what you say
2. Act in ways that are consistent with your words
3. Demonstrate competence
4. Communicate effectively
5. Be consistent
6. Keep to agreements - and don't make promises you can't keep
7. Maintain confidentiality
8. Admit mistakes

Remember

Not every relationship works out and not every coach and client will be a good match for each other. If you both feel that you cannot build rapport, it is better to acknowledge this and find another coach for the client. A coaching relationship with rapport and trust is unlikely to succeed.

Form Relationships Quickly

The coaching relationships will grow and evolve over time, but there are some things you can do to form a strong, positive connection quickly.

Be non-judgemental

A basic skill for coaching is to have an open mind. This means listening without judgement and being genuinely curious. It can be tempting to jump in and voice your opinion, or a way to 'fix' things, but resist. Practice active listening and ask powerful questions. Aim to fully understand the context of what your client is saying. See Section 6: Communication Skills for more information on active listening.

Share experience

Share your past coaching experiences. This can help both you and your client get clear on your expectations from coaching, as well as build your client's confidence in your abilities. Share stories, core values and goals to establish a mutual understanding.

Be supportive

When people are supported they feel good about themselves and are more confident in their ability to achieve their goals. Being supportive does not mean "coating everything with sugar." Sometimes you must challenge your clients to deal with painful realities. The key is to be candid and honest without shaming. Most importantly, you must continually communicate your belief that the person can and will achieve the desired results.

Support also involves acknowledging the difficulties the other person is facing. Don't underestimate the challenges. Acknowledge them by saying, "I can tell this has been difficult for you." Remember that you don't have to agree to understand, but you must understand.

Ask permission

Feedback is an important part of the coaching process. At the start of the coaching relationship request permission to feedback to your client what you are picking up with your intuition and noticing. Before beginning to coach the client in new or sensitive areas, again ask their permission.

Seek feedback

It can be intimidating to ask for feedback, but making your client but being open to constructive feedback is essential to building trust. Ask your client how the relationship is going and what you can do to support them better. See Section 10: Giving Feedback for more information on receiving feedback.

Laugh

Use humour, appropriately. Coaching can be stressful for both the client and coach. In the first session especially your client may be feeling nervous or unsure about what to expect. A well placed remark or story can form a positive connection and disperse tension. Remember to do this appropriately and with sensitivity. If you're not sure whether a client would appreciate a joke, it is better not to make it.

Demonstrate Empathy

Empathy is the awareness of others' feelings and emotions. It is a central part of emotional intelligence and an important skill to nurture if you want to connect deeply with your clients, and people in general.

Sympathy and empathy are often used in similar contexts, but they are not the same. Sympathy is a compassion or concern for another. Empathy is sharing in the feelings of the other person. More than just noticing their feelings or emotions, someone showing an empathetic response will take a genuine interest in the other person and imagine what they are going through.

- Sympathy: "I care about your suffering"
- Empathy: "I feel your suffering"

Dr Brené Brown refers to four stages of empathy[1]:

1. Perspective taking, or putting yourself in someone else's shoes
2. Staying out of judgement and listening
3. Recognising emotion in the other person that maybe you have felt before
4. Communicating that you can recognise that emotion

[1] https://twentyonetoys.com/blogs/teaching-empathy/brene-brown-empathy-vs-sympathy

How to develop empathy

Some people are naturally more empathetic than others, but empathy is a skill you can learn and improve through practice.

An empathic response begins with understanding others. This includes:

1. Listening deeply
2. Picking up on non-verbal cues the speaker is giving, such as emotions and body language
3. Using questions to find out more about the other person and what they are feeling
4. Actively checking that you have understood correctly.

Top tip

Empathy involves seeing things from the other person's point of view. Even if you don't agree with the other person's point of view, respect their feelings. Try to identify with the emotion they are experiencing - perhaps you have personally felt it in a different work or life situation.

Avoid making judgemental, undermining or belittling comments. The following table shows examples of responses that block empathy (avoid these) and support empathy.

Client comment	Empathy blocker response (avoid)	Empathetic response
"My business is struggling"	"You should have worked harder"	"That sounds really challenging"
"I didn't reach my sales target"	"I bet you feel angry"	"I can see how that would be difficult"
"I feel dissatisfied in my work"	"At least you have a job"	"I'm glad you told me. That must be hard"

Useful phrases

Below are examples of empathetic responses. Remember there is no script for demonstrating empathy, it comes as much from the way you interact with the other person as the words you say. When people are sharing something difficult for them, often what they want most is someone to really listen.

Use these as ideas on how to make your responses more empathetic.

Acknowledge their difficulty / pain

I'm sorry you are going through this.
I hate that this happened.
That must be hard.
That sounds really challenging.
I can see how that would be difficult.

Be supportive

How can I help you?
What do you need right now?
I'm happy to listen any time.
I would like to do _____ for you.

Show gratitude for them being open with you

Thank you for sharing with me.
I'm glad you told me.
Thank you for trusting me with this.
This must be hard to talk about. Thank you for opening up to me.

Show interest

Is there anything else you want to share?
How are you feeling about everything?
What has this been like for you?
I want to make sure I understand...
What I'm hearing is that you are feeling ____.
Is that right?
Is there anything else you want to share?

Responsibilities of the Business Client and Coach

The coaching relationship is a collaborative one, but it is not one of equal responsibilities. The coach is there to support the client, but the coach cannot actually do the work for the client.

It is important to understand the different responsibilities of the coach and the client. If these become confused or blurred, the coaching process can break down, leading to annoyance and frustration.

The coach should clearly explain the responsibilities to the client at the beginning of the coaching process.

Coach responsibilities	Client responsibilities
Explain the coaching process, prepare the Coaching Agreement	Provide honest and accurate information
Conduct the KPI and business assessment	Generate ideas and options to resolve the challenges / problems identified
Keep the focus on clearly defined actions that are agreed with the client	Decide on actions that need to be taken
Help the client approach problems with fresh perspectives	Ensure the actions are carried out according to the action plan
Deliver constructive feedback	Regularly report on progress
Facilitate access to other business development services	Provide feedback on the coach and coaching process
Ask illuminating questions to help the client gain insight and self-awareness	Take responsibility for their own learning

Is the client ready for coaching?

For a coaching relationship to be truly successful it is important for the client to be in a mindset where they are receptive and willing to engage. Ideally the client is:

- Open and honest - willing to talk genuinely about their strengths, business situation and challenges
- Motivated to learn or change
- Ready for a collaborative process
- Prepared to ask questions
- Able and willing to take responsibility - coaching is a personal process that must be led by the client themselves
- Interested in what the coach has to say, and the coaching process

- Receptive to change, one-on-one help and guidance and aware enough to act on the support given
- Motivated to improve their business performance (or other desired outcome)
- Willing to commit time, energy and resources to the coaching process, over a significant period of time
- Willing to face weaknesses and adopt self-assessment practices
- Able to persevere
- Ready to take responsibility for their own learning

Coaching Agreement

When establishing a new coaching relationship, it is important to deal with the rules of engagement explicitly, right from the start. Neither the prospective client nor the coach should make assumptions about what the coaching process will look like.

Setting expectations

It is the responsibility of the coach to correct assumptions and provide clear expectations. The client needs to understand they are entering into a partnership with the coach that differs from the relationships they may have had with teachers, trainers and mentors in the past.

In Sri Lanka, where business coaching is relatively new, setting expectations may also include educating the client about coaching. When you begin working with a new client, invest time in making sure they have a clear understanding of what business coaching involves. This will make the coaching relationships more beneficial for both of you.

Example

Ranjit is 40 years old and has an ice cream shop in Valaichennai, a town very close to the popular tourist destination of Pasikudah. Recently, his customer numbers have dwindled and he is having trouble attracting tourists into his shop, so Ranjith decides to work with a business coach to find ways of improving his business.

Ranjith is not familiar with the coaching mode of learning. His learning has been mainly in the form of a local high school where the learner-teacher relationship was very formal and the teacher was an authority figure. Asking questions and thinking out of the box was not encouraged in his school as it was seen as disrespectful.

What might Ranjith's expectations of the coach - client relationships be like?

Since Ranjith's learning background was in a formal school environment, he may expect the coach to take on the role of 'teacher' and provide him with all the answers to his problems. Since the coach won't do this, the coach needs to correct this at the start or it's likely Ranjith will feel disappointed that the coach doesn't tell him what to do.

This style of discussion and questioning might feel uncomfortable to Ranjith, and he may be shy and reluctant to explore ideas, or ask for clarifications. The coach needs to help him understand that coaching is a collaborative process where the client and coach ask each other questions to generate understanding and insight.

In a situation like this, it is the responsibility of the business coach to help their client understand how the coaching relationship is different to other learning environments, and build a comfortable relationship where they can speak honestly and openly.

Setting expectations involves finding out what the client expects, and letting them know exactly what you will (and won't) be providing. It is an opportunity to clear up any misunderstandings before you start and to avoid potentially having an unhappy client later on.

The expectations you will need to set will vary depending on the coaching you are doing. There are two general types of expectations:

1. **Performance expectations:** concern the results and outcomes that should be achieved. This includes the focus of the coaching, areas you will cover and any areas you are unable to help with.

2. **Behaviour expectations:** relate to expected behaviours, attitudes and values. This includes boundaries and logistics like the amount of time you will be available for coaching, the medium of coaching (in person, phone, email) and the frequency.

After discussing, it is good practice to outline the expectations in writing in the Coaching Agreement.

Remember

Setting clear expectations doesn't stop you from over delivering. You can always give the client more than they expect if you want to. But be sure not to agree to something that you cannot deliver.

What is a Coaching Agreement?

A Coaching Agreement (sometimes referred to as Coaching Contract) is a formal statement that outlines the coaching process and relationship. It is prepared by the coach and signed by both the coach and the client.

The ICF states: “Contracting is an explicit way to position and clarify the professional aspect of coaching work. A coaching contract establishes clear and healthy boundaries for all involved and negotiates responsibilities and actions.”[2]

The document outlines the expectations of the coaching process, what the client hopes to achieve, the logistics of the coaching relationship as well as addressing important foundations such as ethics and confidentiality. A well written agreement enables both parties to read it and know a) what is expected of them and b) what they will receive in return.

Why do I need a Coaching Agreement?

Creating a Coaching Agreement:

- Sets the ground rules so that both you and your client are aware of your obligations
- Gives both parties peace of mind
- Offers necessary protection to the coach from the possibility of disgruntled clients, or requests for refunds
- Helps to build your client’s confidence in the coaching process
- Guides the client on how to make the most out of the coaching by setting expectations
- Allows you to focus on coaching during your sessions

[2] https://coachfederation.org/blog/boundaries-in-coaching

The Coaching Agreement is a tool to keep both the client and coach accountable. It creates the professional structure within which the coaching relationship can flourish.

During the discussion with the client on the Coaching Agreement, you should also reach agreement with the client about:

1. What is and is not appropriate in the coaching relationship
2. What is and is not being offered
3. The responsibilities of the client and of the coach

In addition, at this stage you should also determine whether or not there is an effective match between your coaching capabilities and the needs of this individual client.

What's in a Coaching Agreement?

Coaching Agreements are tailored to the type of services the coach offers and the needs and requirements of the client. The agreements are also designed according to the needs of the market and by taking into consideration the context of the place and type of coaching required.

However, many elements are the same. Coaching Agreements typically include:

1. Introduction - what is the purpose of the coaching, and this document
2. Specific parameters of the coaching relationship:
    - **Terms of the agreement** (duration: 6 sessions, unlimited for 3 months etc.)
    - **Logistics** (where you will coach, location / online, availability of the coach for discussion on email/phone)
    - **Fees** (how much you charge, options and timelines for payment)
    - **Schedule** (weekly, monthly, ad-hoc)
    - **Inclusion** of others (if appropriate)
    - **Cancellation** and refund policy
    - **Rescheduling** of session policy
    - **Termination** policy
3. Scope of practice (what coaching is, including methods and techniques)
4. Disclaimer (what coach isn't e.g. a substitute for financial advice)
5. Client responsibilities - this reminds your client they need to be accountable and take responsibility for taking action and accomplishing their goals
6. Statement of ethics
7. Statement of confidentiality
8. Indemnity / limitation of liability
9. Contact information - for you and your client

There are many different styles of Coaching Agreements. As a coach, you can refine your own agreement with experience until you achieve your ideal template document.

The International Coaching Federation (ICF) provides a sample coaching agreement on their website:
https://coachingfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf

The Worldwide Associate of Business Coaches (WABC) offers advice on creating an agreement on their website:
http://www.wabccoaches.com/white_papers/20150129/WABC-White-Paper-Contracting-within-the-Business-Coaching-Relationship--a-Guide-and-a-Cautionary-Tale-Jan-2015.pdf

Coaching Agreement do's and don'ts

Do	Don't
✔ Create the agreement in partnership with your client	✖ Dictate the agreement
✔ Establish a measure of success in the agreement	✖ Rush the agreement, or skip it
✔ Talk time to thoroughly discuss, and reach a deep level of understanding using active listening and probing questions	✖ Include unclear terms. The coaching agreement should be a source of clarity not confusion
✔ Clearly outline what you can offer, and what you can't	✖ Assume you and your client both agree or understand something the same way

Set Boundaries

As a coach, you need to decide which boundaries are important to you and be confident in setting, and sticking to them.

Follow the below steps to set effective boundaries

1. **Communicate** your boundaries effectively, and early. Keep your voice positive and confident.

2. **Be assertive.** If clients are straying across boundaries, remind them and stay in control. Remember, clients may, or may not be aware that this is what they're doing, assess and handle each situation appropriately.

3. **Respect your time**. Your time is valuable and clients should respect the schedule agreed for the coaching.

4. **Do not feel guilty** about your boundaries. If you have clearly communicated them, do not allow clients to manipulate or persuade you into changing them.

5. **Be confident** in saying no. You may need to say 'no' to conversations that are overly personal, or requests that are unreasonable for a variety of reasons.

As you progress in your coaching career, regularly reassess your boundaries. New experiences may cause you to reconsider certain aspects. Look at your client relationship and consider what is not working. Then create new boundaries where needed. Remember to share what these are with your clients.

Blurred boundaries

The table below shows common situations where coaches may experience a blurring of boundaries.

Situation	Boundary
Caring too much	Coaches have a genuine interest in the progress and well-being of their clients, but this can cross into a caretaker / rescue role if the coach allows themselves to care too much.
Not valuing time commitments	Repeatedly going over your allocated coaching session time blurs the boundaries of your Coaching Agreement.
Maintaining neutrality	When discussing interesting topics it can be tempting to take sides or say 'yes' to something, but by doing so you are saying 'no' to the other option. You may also find yourself relating to your client's story and losing objectivity. Pay attention and maintain your neutrality as a coach.

Situation	Boundary
Changing roles	Over time, you may find your relationship transitioning from coach to good friend, or vice versa. Alternatively, there may be times when you transition into the role of mentor, rather than coach. At times like this, let your client know that you are transitioning between roles. Consider saying “I’m taking off my coach hat now and putting on my mentor hat”, for example.
Being triggered	Understanding your own beliefs and biases is important as these influence the boundaries you set. Take time to think about what is important to you in a coaching partnership, what a partnership means to you and what is (and isn’t) acceptable to you. Once you have clarity on these, you are more likely to honour your own boundaries, and your client’s.

Adapted from: www.coachfederation.org/blog/boundaries-in-coaching

Strategy, Marketing and Mindset Coach Christine Kane states: “Where there is stress, there is a lack of a standard.”[3] If you find yourself overwhelmed or drained by a client situation, view it as a chance to identify a missing boundary, and to implement a solution.

Example 1:

Situation: You find yourself unhappy with clients calling you in the evenings and at weekends.

Boundary: You implement a new boundary of not taking work calls after 8pm. Remember, it is also important that you stick to your own boundaries and not make work calls after 8pm.

[3] *https://christinekane.com/setting-boundaries-with-demanding-clients/*

Example 2:

Situation: Your client wants to connect with you on social media and sends you friend requests. You don't want to insult or offend them by rejecting their requests, but you also don't want to mix your personal and professional lives.

Boundary: You decide to connect with clients only on LinkedIn, not on other social media sites such as facebook and instagram.

Remember

If your client exhibits problematic behaviour you may feel tempted to allow it to continue for fear of upsetting or even losing the client. However, this is likely to lead to larger problems later in your coaching relationship. **Boundaries work best when they are established clearly and early.**

Prepare for Coaching

Preparation is the background part of the coaching process that takes place before you meet your client. Use this time to:

- Think about and research the client, their business and the industry / sector they are part of.
- Consider your own abilities and limitations, how might they influence or impact coaching this client?
- Prepare for possible obstacles and challenges during the coaching.

Remember

Things do not always go to plan during business coaching. By preparing thoroughly you will be in a good position to respond to the unexpected

How to prepare

Research and prepare answers to the following who, what, why, where and how questions.

	Questions to prepare
Who	Who are you coaching? Who suggested, recommended or referred them for coaching?
What	What is their role within the organisation? What is their career background? What are their strengths? What would they like to improve? What do they hope to achieve? What concerns or reservations do they have about the coaching process? What concerns or reservations do you have about the coaching process? What have you been asked to do for the client? What angle and approach can you take towards this client? What limits do you have? How might they impact the coaching? What factors will be under your control during the coaching? What won't? What obstacles might you face in this coaching process?
Why	Why do they need coaching? Why do they want or need to change?
When	When is the client at their best, alert and able to concentrate? When is a convenient time for them to meet with you? When are you at your best, alert and able to concentrate?
Where	Where is the business located? Where can you find a suitable place to conduct coaching sessions
How	How much experience do they have? How can you structure the coaching to match their preferred learning style? How will you establish a strong coaching relationship with them? How will you know if the coaching process has been successful for them? How will you know if the coaching process has been successful for you? How will you keep the client motivated and focused? How much time is needed to work with the client on their goals? Do either you or the client have a limit? How long will your sessions be?

You may not be able to answer all of these questions before you meet with your new client. You may also re-discuss the questions with your client at the first meeting.

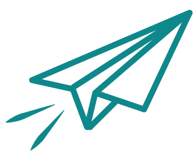
The First Meeting: Creating a Positive Foundation

Your initial meeting with your client is not only the first step in their coaching journey, it is also your first opportunity to build the kind of positive, collaborative relationship that is important to the success of the coaching.

First meeting priorities

During this meeting, you will learn about your client and they will learn about you and the coaching process. You should:

- **Ask questions** of your client to understand their motivations, needs, current situation and expectations. Ensure you have clear answers to all of the questions above.
- **Answer questions** from your client. Ensure you allow time for this and actively encourage them to ask questions or share concerns.
- **Orient the client** to the structure and process of coaching. Explain to them how you will be approaching the coaching process and what your coaching style is like.
- **Set expectations** of what the coaching process is and is not. Discuss and agree appropriate boundaries.
- **Arrange the Coaching Agreement.** This is time to go over the formal and practical aspects of your coaching relationship, such as:
    - Who is taking part in the coaching
    - Roles and responsibilities
    - Goals and objectives
    - Logistics - timing, fees, schedules



Top Tip

Pick a location that is agreeable to both of you. It should be private and free of distractions. By making the coaching a one-on-one experience, it becomes easier for the client to talk about their business and issues. They are not in front of their employees or competitors, and therefore the issue of ego is reduced. The more open the client is about their issues, the more effectively you can collaborate to resolve them.

First meeting priorities

The first meeting with your client will set the tone for your coaching relationship. A weak relationship will make it more difficult to accomplish progress. The first meeting is your opportunity to build trust between you and your client.

If your client has not worked with a coach before, they may be unsure of what to expect and need some time to adjust to the process and understand what is expected of them. This first meeting is your opportunity to address this. Factor in time for answering questions and explaining. Some business coaches view the first meeting as a practice run for future sessions, giving the client the opportunity to learn the processes and expectations in a controlled environment.

Remember

The first session is the beginning of your collaborative partnership, it is not an interrogation! Ask questions in an open and friendly manner. Build trust, confidence and respect with your client. Aim to form a rapport that enables your client to feel comfortable communicating openly, honestly and freely with you.

During the meeting

The flow of a first coaching session will depend on your coaching style, and your client. Use the following list as a general order to guide you.

1. **Welcome your client.** ask them to sit down, shake hands. Appear warm, personable, approachable. Think of body language, eye contact. Introduce yourself.

2. **Find out about the client:** name, personal and general background to make them feel at ease.

3. **Find out about their business:** the basics - what they do, how long they've had it ec. Use the Basic Information Form in the Toolkit to record these details.

4. **Introduce yourself:** ask how they found out about the coaching session. Tell them about your work background and why you are doing this and what experience you have had with coaching (establish credibility).

5. **Discuss and set expectations:** ask them what they want to achieve from the coaching. Ask them how long they think the process will take, give them some idea about this. Ask them what they expect you to do for them. Explain the role of a coach and their role as a client.

6. **Introduce business coaching:** explain the process of coaching. Talk about the importance of honesty and confidentiality. Explain how you provide your coaching services. If they are happy with the idea, draw up a Coaching Agreement.

Stay Focussed

It's important that the coaching session stays on track and does not shift into a general discussion or chat. It's also important to ensure the client doesn't digress too much or get caught up in too much detail. Detail is important, but at the early stage of coaching, it's crucial to get the right overall picture of the business and its context.

To help you client stay focussed, you might need to:

- Summarise what they are saying
- Guide the flow of the conversation back to the topic
- Use further questioning
- Interject - occasionally - to bring the client back to the relevant topic

First coaching session do's and don'ts

Do	Don't
✔ Use active listening	✖ Ask to many closed question
✔ Use warm body language and make eye contact	✖ Display uninterested, impatient or negative body signals
✔ Ask questions to check the client's understanding and elicit more information	✖ Reactive defensively to questions, or criticise
✔ Allow the client to ask as many questions as they want	✖ Assume you know what the client's problem is straight away
✔ Talk about confidentiality	✖ Rush the meeting
✔ Work with the client to come to an agreement on the specific terms of the agreement	✖ Dictate to the client how the coaching relationships will work

Section 8

Measuring Business Performance

Introduction

Once you have begun coaching a client and created an action plan, the next coaching sessions will focus on ongoing performance measurement and evaluation to help your client reach their goals, and then update goals for further improvement.

This section covers the activities that take place in ongoing coaching sessions, including monitoring performance, record keeping, identifying gaps and taking action to fill them.

It introduces the KPI Tracking form, which is used to track progress on agreed business measurables.

It also introduces performance metrics such as SWOT analysis, Fishbone Diagram and Pareto Analysis that you can use to monitor and evaluate your client's progress.

Monitoring and Evaluating Progress

Monitoring and evaluating progress are core parts of business coaching. Without these, it would be impossible to verify what progress is made.

Monitoring and evaluation go together as means to track the step by step progress of a client and their business.

Prepare
Coach and client plan and prepare what will be achieved and how

→

Provide
Coach guides and supports the client as they follow the action plan

→

Follow Up
Together coach and client evaluate progress made and adapt the action plan as necessary

Monitor
Progress is monitored throughout in a variety of ways

Diagram S8-1: Coaching is an ongoing process

Monitoring

Monitoring is a continuous reviewing activity, checking whether things are going to plan. In business coaching, the coach and client will review performance against the agreed indicators.

Without ongoing feedback on how a plan is going, the action plan ceases to be of value. Monitoring progress (and updating the action plan where necessary) will ensure that improvements are achieved.

What is monitored will depend on the nature of the business and the action plan agreed with your client. A restaurant business might monitor the number of guests per service, the percentage who reserved in advance vs walk-ins and the income from delivery orders vs dine-ins. A tour guide who wants to get more customers might monitor their number of new followers on social media, partnerships with travel agents and local hotels and number of guests per tour.

Just as in the initial information gathering stage, as a business coach you must use your discovery skills to ensure you are getting full and accurate information.

To monitor effectively you need to know what you are monitoring and why. When using the Blended Coaching model, indicators include:

- Operational Performance Indicators (OPI)
- Business and Employment Indicators (BEI)
- Other KPIs agreed
- Progress against the action plan

The most effective monitoring is accurate, timely, cost-effective and specific.

Evaluating

Evaluation is a periodic assessment of performance in relation to agreed objectives. In business coaching, evaluation is focussed on reviewing the outcome or result against the desired standard or goal. From where the business was, to where it is now, compared with where it wants to be. This evaluation decides the level of success.

Common indicators of evaluation in business coaching for MSMEs include:

- Increased sales
- Increased profit
- Increased customer numbers
- Creation of new employment
- Reduction in waste
- Adoption of new technology
- Improved safety

Careful evaluation of performance will provide the information need to:

1. Plan short term interim fixes while longer term solutions are worked out
2. Adjust plans if the goal has been unrealistic
3. Make corrections to eliminate barriers to better performance and customer service
4. Develop and follow a contingency plan if unforeseen circumstances have taken your client off target temporarily.

Remember

Evaluation should not be conducted based only on what the client says. Proof of evidence, such as client records, booking numbers, financials, and online reviews are important, as well as your own observations.

KPI Tracking

KPI tracking is an effective way of monitoring and evaluating progress made. The KPI Tracking Form allows you to record information over multiple coaching sessions. This data then forms the basis of your discussions with the client about their business performance.

The KPI Tracking Form:

- Is designed to be used in each coaching session. This information will be used to evaluate progress made, so it is important that you and your client both agree on the data recorded.
- Should list all of the KPIs you and your client have agreed to track. These can be BEIs, OPIs or other custom metrics.
- Has suggested headings, similar to the Baseline Profile Form. Feel free to adjust them to suit the needs of your client.

The KPIs tracked should be of significance to the business and are likely to be related to items listed in the action plan. Some KPIs you will track throughout the coaching relationship, others you may only track for a short period of time until the related action item is resolved.

Remember

The KPI Tracking Form and the Action and Skills Development Plans are live forms. They should be updated with new information in each coaching session and adjusted where and when necessary.

Example

The owner of Singing Fish guest house, Kannan, hired a business coach to help him get more guests staying in his property. After completing the Baseline Profile Form, Kannan and the coach agree that the guest house needs to improve its presence online, including on online travel agencies (OTAs) and social media.

They set an action plan objective of getting 1,000 new followers on Instagram by the end of April. They agree to track as KPIs a) the number of new followers on Instagram, and b) the amount spent on Instagram advertising.

After three coaching sessions, the KPI Tracking Form looks like this:

KPI Date	31/01/2020	28/02/2020	31/03/2020	dd/mm/yyyy
Marketing				
New followers on Instagram	10	180	525	
Expenditure on Instagram marketing	$0	$15	$15	

What has changed?

- Over three months, Kannan has grown Singing Fish's Instagram following by 715.
- In the first month, he did not spend any money and did his normal posts, this resulted in 10 new followers.
- In the second month, he spent $15 on sponsored posts, and got 180 followers. Kannan was disappointed by a rate of 12 new followers per $1 spent.
- In the February coaching session Kannan and his coach reviewed his Instagram strategy and the hashtags he was using. Kannan also set an action point of researching Instagram content marketing strategies.
- In the third month, Kannan used Sri Lanka specific hashtags, and changed the visual style of his posts. The results were great. Singing Fish received 35 new followers per $1 spent.

What has improved? Why?

- The number of new followers per spend on sponsored posts has increased from 12 to 35.
- Kannan has learnt about content marketing and developed his photography and photo editing skills.

What are the next steps to take?

- To reach his goal of 1,000 extra followers by the end of March, Kannan needs to get 285 new followers in the next four weeks.
- Based on the data from March, Kannan needs to spend $8.14 to achieve this (285 followers / 35 per $1). He could reduce his spend, or continue at the same amount and hopefully exceed his goal.

The following diagram shows an example of a KPI Tracking form after three coaching sessions. Note, this is a mini-version of the form and does not include all possible rows

KPI Tracking Form

This form is a live document. The KPIs tracked should be agreed between coach and client and updated at each coaching session. You can add as many rows as required.

List the KPIs you will track in the left hand column. These should be clearly defined and agreed with your client.

Insert date of coaching session / data collection

There is space for 8 sets of data. If you need more, you can start a new KPI Tracking Form. Some KPIs may only need to be tracked for a short time, others for the entire coaching relationship.

The headings in the form are to guide you based on the OPIs BEIs. Feel free to replace these with ones that are tailored to your individual client.

KPI Date	01/01/2020	01/02/2020	01/03/2020	_/_/_	_/_/_	_/_/_	_/_/_	_/_/_
Product								
Average room occupancy per month	48%	52%	65%					
Marketing								
New followers on Instagram	10	75	230					
Expenditure on Instagram marketing	$0	$15	$15					
Human Resource Management								
Percentage of female employees	0%	0%	10%					
Environmental Sustainability								
Other KPIs								

Data Collection Methods

Data collection captures information and evidence that seeks to answer questions that have been posed. Through data collection, you and your client can obtain quality information on which to base decisions.

Data collection is a crucial part of measuring and analysing business performance. It is particularly important in customer facing businesses to find out how people view the service levels and products. At the start of a new coaching relationship, it can be helpful to gather data on your client's business. This will help you understand their current situation, and target the right areas for coaching.

Business coaches need to be familiar with a variety of data collection methods, know how to select an appropriate method, and how to guide their client through the process.

What is data collection?

Data collection is a systematic method of collecting and measuring data gathered from different sources of information in order to provide answers to relevant questions.

Common methods of data collection include:

- Surveys
- Interviews
- Observations

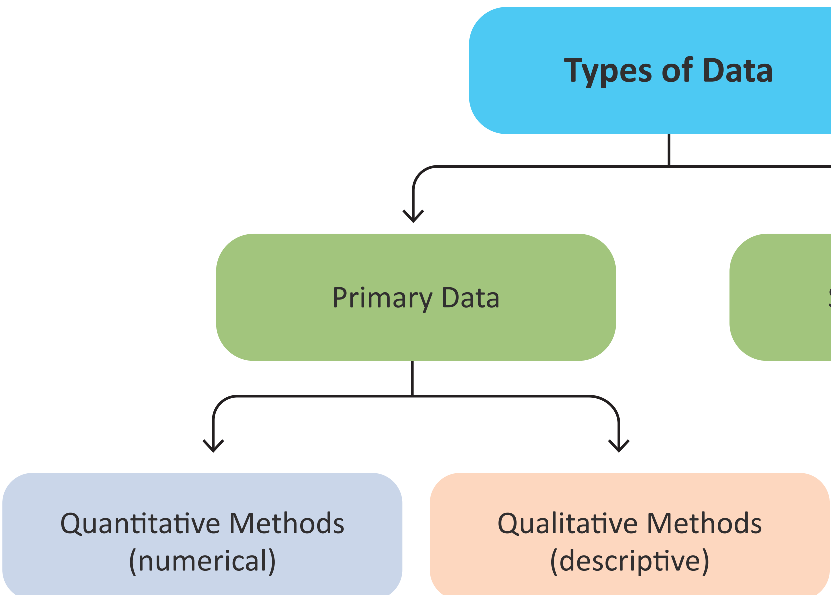


Diagram S8-2: Types of data

Primary data is collected through first-hand sources; it is raw data. Examples include interviews and observations.

Primary data can be broken down further into quantitative and qualitative data collection methods.

- Quantitative methods generate numerical data, or data that can be transferred into statistics. They are typically close-ended questions. For example finding out the average length of stay at a particular guest house.

- Qualitative methods are descriptive rather than numeric. They typically uncover patterns in thoughts and opinions, for example, interviewing someone about their experience with a product.

Secondary data is collected by an individual other than the original user; it is data that already exists. Examples include books or journals.

Remember

Picking the right data collection method is necessary to achieve the desired objective. If the wrong data is collected, or collected inaccurately, it will impact the findings of the analysis and could set a client on the wrong - potentially damaging - track.

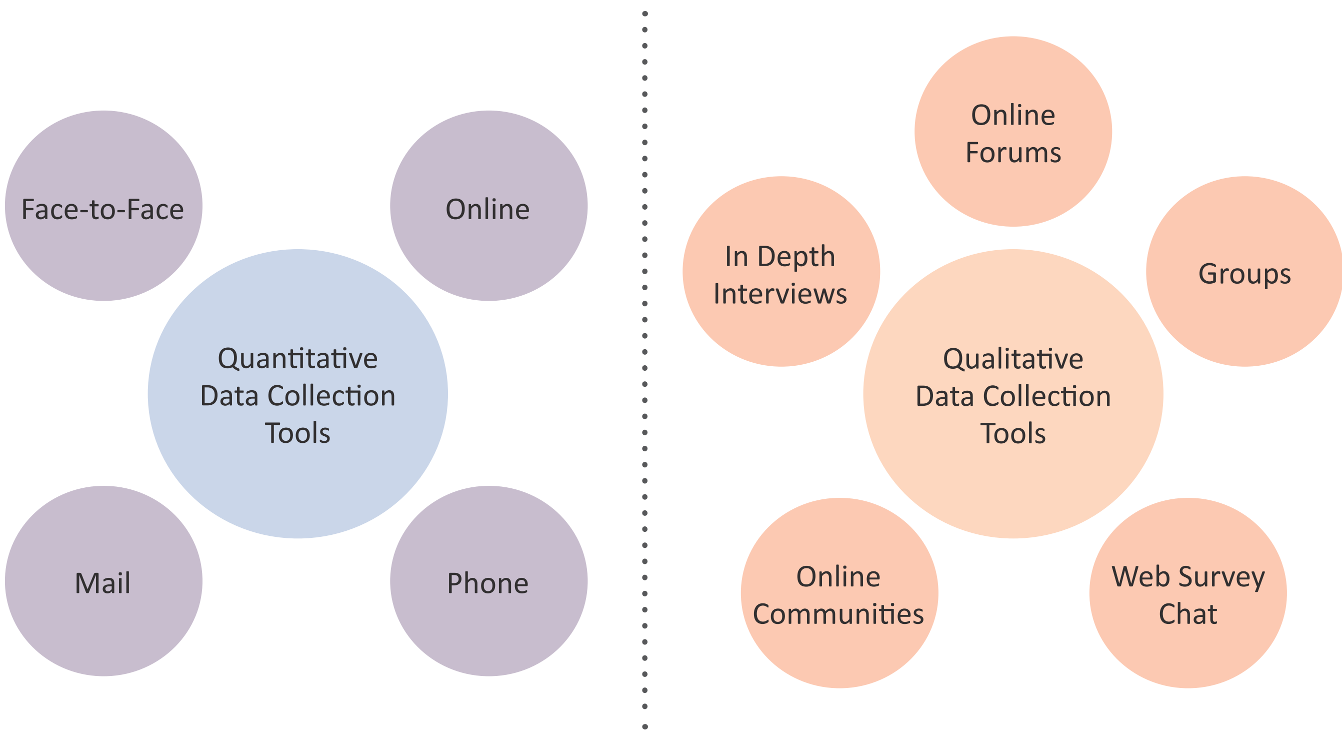


Diagram S8-3: Quantitative and qualitative data collection tools

Survey

Surveys gather information from individuals or groups based on their opinions or experiences of a particular topic. Typically surveys take a sample of a population, with a view of generalising the results. In a large organisation, a percentage of employees may be surveyed; in a small business, it may be possible and practical to survey all relevant individuals.

Surveys are typically inexpensive to conduct and the results are generally easy to analyse.

Common modes of survey:

1. Face to face
2. Telephone
3. Self-administered (on paper, or online)

Technology has made online surveys easy and accessible. Many survey providers can send out a request via email that participants can complete online. This is convenient for the participant and the data gathered is in a digital format, making analysis easier. Questionnaires are not the same as surveys, but they may form part of a survey.

There are different ways of asking questions depending on the type of feedback you want to receive. The following table shows some examples.

Question Type	Example
Open-ended	**What could we do to improve our service?** Effective at shining a light on unknown areas for improvement or customer needs. The downside is because they take more time to answer, less people may respond and responses are difficult to analyse.
Nominal	**Where are you from?** I am from Europe | Asia | Australasia | The Americas | Africa Easy to answer and effective when there is a limited number of possible answers. However, only effective when all possible categories of response are included, or a free text 'other' box is available for customers to write an answer.
Likert Scale	**The food was tasty:** Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree A scale that evaluates the level of agreement with a statement. Effective at monitoring satisfaction in a chosen area, but not effective at picking up new problems, or unknown opportunities.

Question Type	Example
Rating Scale	**How would you rate our cleanliness on a scale of 1-5?** Very clean: 1 2 3 4 5 :Very dirty Often used to rate products such as a hotel on booking.com. The numerical value is easy to track over time but rating scales are not effective at picking up new problems, or unknown opportunities.
Yes / No	**Would you use us again in the future?** Straightforward to answer and useful at the beginning of a survey to encourage customers to engage. The downside is they only give limited information and segment responses into only 2 groups.

Example survey

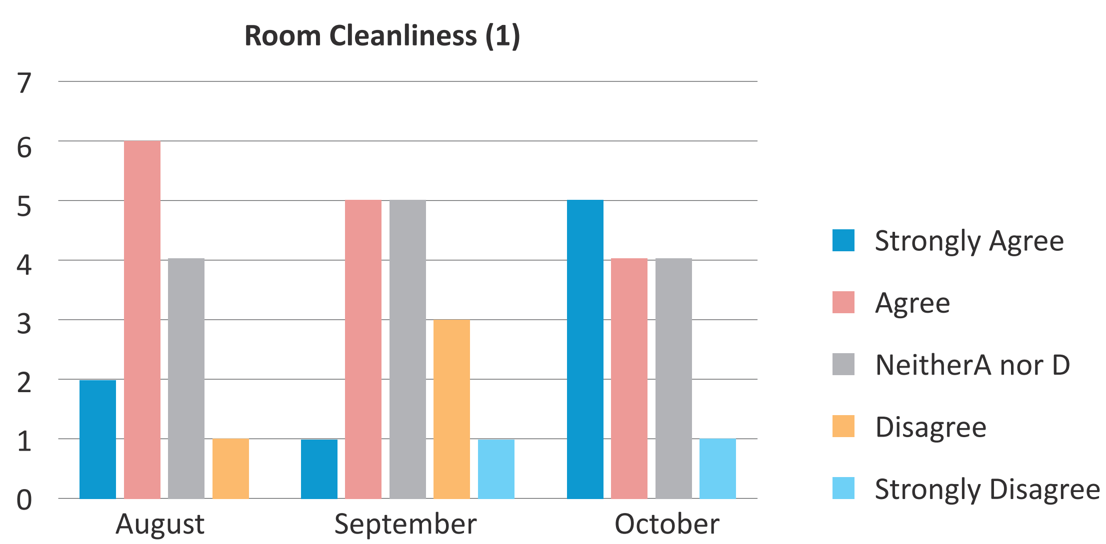
The Palm Tree hotel in Sigiriya conducted a guest survey using a likert scale to ask about cleanliness.

The statement was: ‘The bedroom and bathroom were at a good level of cleanliness’. There were 5 possible responses, from strongly disagree to strongly agree.

The following graph shows the number of customers who chose each response over a period of three months. By looking at the date it is clear there is a growing problem with cleanliness. The number of people disagreeing with the statement is increasing.

To view these results in another format, each response is assigned a numerical value:

Strongly disagree (1)
Disagree (2)
Neither agree nor disagree (3)
Agree (4)
Strongly agree (5)



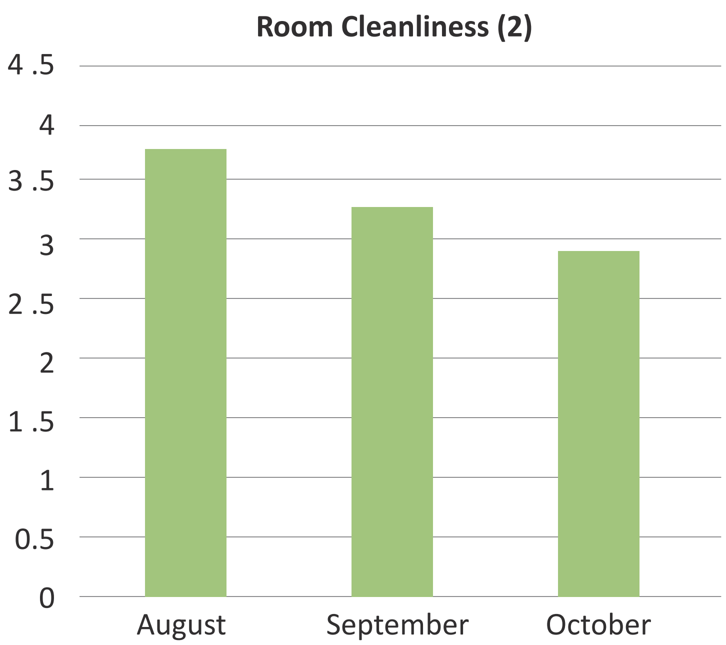
The averages are:

August: 3.7
((5*2) + (4*6) + (3*4) + (2*1) + (1*0)) / 13

September: 3.2
((5*1) + (4*5) + (3*5) + (2*3) + (1*1)) / 15

October: 2.9
((5*0) + (4*5) + (3*4) + (2*4) + (1*1)) / 14

This graph shows satisfaction levels are steadily decreasing month on month.



The hotel manager and her business coach agree to continue tracking cleanliness satisfaction and set up a SMART goal in her action plan to reach an average score of 3.5 by the end of November. Once she reaches this, she hopes to increase to 4.5 by a later date.

Interviews

Interviews are useful to collect in-depth information from the individual(s) being questioned. They may range from formal to informal. Typically they are conducted face to face or over the telephone.

Interviews may be:

- Structured: a verbally administered questionnaire with set questions
- Unstructured: The interviewer has freedom with the questions they ask and can collect a wide range of information in-depth
- Semi-structure: A mixture of the above, typically several key questions with freedom to explore further.

Observations

In observations data is collected by viewing participants in a specific situation at a given time. For example observing a tour guide on a tour, or observing a receptionist check-in guests to a hotel.

Observations can be controlled (using a standardised procedure), natural (participants are observed in unaltered or natura conditions) or participant (where the observer becomes part of the group being studied).

They may also be overt (the participants know they are being observed) or covert (they are unaware they are being studied).

Comparison of data collection methods

Method	Mode	Pros	Cons
Survey	Face to face Telephone Online	Inexpensive Simple to analysis Versatile Can be issued in large numbers	Inflexibility Limited, no opportunity for follow on questions or clarification
Interview	In person Telephone	In-depth information Accurate data Flexibility	Time-intensive Potentially expensive to administer
Observation	In person	Easy to conduct Relatively high level of accuracy Widely accepted practice	Time consuming Potentially expensive to administer Bias may arise Not always practical

Regular Coaching Sessions

In the initial coaching session you got an understanding of your client's business, set and assessed KPIs for the first time to establish the baseline and created the action plan.

In each subsequent coaching session (referred to as 'regular' coaching sessions), you should reassess these KPIs as measurements of progress.

1. **Review** the KPIs. Through evaluation, inspection and documentation, review the performance of each of the agreed KPIs on the KPI Tracking Form.
2. **Record** the updated KPI information on the KPI Tracking Form. Use a new column and write the date at the top.

3. **Discuss** progress made (or not made). The KPI information forms the foundation for your appraisal of the business' (and client's) performance. Discuss:
   - What has changed?
   - What has improved? Why?
   - Are there areas where performance has worsened or remained the same? Why?

4. **Review** the action plan set in the previous session. Check which activities have been performed. If any activities are not performed, identify the reasons why.

5. **Update** the action plan with completion dates and new objectives set. Make adjustments to actions in the plan, such as extending timelines, or changing SMART objectives, as needed.

During each coaching session the topics of discussion and areas of focus will vary. The KPI Tracking Form and the Action and Skills Development Plan provide a structure for you to gather the necessary information to monitor and evaluate progress.

In addition to reviewing performance, business coaches talk to clients about their concerns, questions and how they feel about progress made.

Remember that each coaching session should be tailored to the needs of your client. While it is helpful to have a structure to guide you, effective coaches are flexible and adapt to what is most essential and beneficial for their client at that time.

Reviewing and revising goals

The goals set in the action plan should be regularly reviewed to ensure they are still relevant for the client. If the client's strategy or situation changes, the goals will need to change also.

There are several reason why you might want to revise goals:

- The goal is complete.

  In this case, you can set a new goal for the same area that goes further (e.g. from 50% occupancy to 60% occupancy), or move on to focus on goals in other areas if this root problem is solved.

- The client's strategy or overarching goals have changed, and the goal or action plan item is no longer relevant.

  In this case you need to collectively design and agree a new action plan aligned with the new strategy.

- Progress is being made towards the goal slowly or not at all. In this case, ask and answer the following questions:

1. **Are the right measurements (KPIs) being tracked against the goal to show progress?** It is possible progress is being made, but the KPI is not capturing it. For example, the goal is new Instagram followers, but the KPI tracks Instagram 'likes'. If this is the case, adjust the KPI and update the KPI Tracking Form.

2. **What efforts (if any) has the client made towards achieving the goal?** If the client has not done anything, it isn't surprising no progress has been made. If this is the case, go deeper into the issue with the client, why haven't they taken the agreed actions? Is there a practical / financial / operational reason, or is it motivational or behavioural?

   If the client has made an effort, examine why they haven't been effective. Is there a gap in skills or knowledge that needs addressing? For example, if the client has been posting every day without gaining new followers, they need to learn how to make effective content that will appeal to their target audience. As the business coach, you can point them towards learning opportunities such as free online courses in social media content creation.

3. **Is the goal achievable and realistic?** If the goal is far beyond the clients abilities or means, it should be revised to something more SMART. For example, if the goal is 100,000 new Instagram followers, and the client has achieved only 1,000, the goal should be revised to an achievable number, such as 50,000. Once they reach this, the next goal can be 20,000 and so on. Remember - achieving goals is very motivational!

Example A: goal complete

In an example from earlier in this section, Kannan, the owner of Singing Fish guest house was working towards a goal of 1,000 new Instagram followers by the end of April. In fact, he managed to exceed his goal and achieve 1,100 new followers. This means his goal is complete.

He wants to grow his social media following further so Kannan and his coach agree two new action points:

1. To gain 5,000 new followers by the end of July.

2. To reduce the new follower to sponsored content spend from 35 followers per $1, to 100 followers per $1. This means that Kannan gets a bigger return for his Instagram advertising spend.

These are steeper goals than before, but after discussing with his coach, Kannan feels confident that he can achieve them. He plans to create a hashtag for his guesthouse so guests can tag them in their personal posts (free advertising!) and study more online about good content marketing practices so his posts can become even more effective.

Reviewing and revising KPIs

A well-designed set of KPIs should provide a clear indication of current data. They are a real-time set of tools that should lead to better performance. The right KPIs should help your client make better decisions to bring them closer to achieving their goals.

The KPIs you measure will not remain the same forever. Just like goals, they should be challenged and questioned to ensure they remain relevant, helpful and linked to strategy.

With KPIs you should:

a) Collect the right data

b) Collect it often enough

c) Use what you collect

Whenever there is a change in strategy or action plan, you need to review the tracked KPIs with your client to make sure that they remain relevant. There is limited value in tracking endless KPIs, if they are no longer relevant, stop tracking them.

Remember

Achieving a goal is very motivational for clients, remember to celebrate this with them! It is also a time to reflect and evaluate, look at the purpose of the goal and why it was important.

Ask your client:

- What did you do?
- How did it go?
- What worked and what didn't?
- What would you do differently next time?

Record keeping

It is important for coaches to keep records of their coaching sessions for several reasons:

1. As an aide memoire for the coach
2. To improve continuity between sessions
3. To facilitate action, planning and evaluation of progress
4. To provide a record that is clear, complete and up to date
5. To provide evidence that you, the coach, are engaging in your activities in a professional and responsible manner

In addition to updating your KPI Tracking Form and the Action and Skills Development Plan with your client, after the session, your record keeping may include:

- Background
- Objectives of coaching session
- Methodology used
- Discussion topics
- Findings of coaching session
- Common observations and recommendations
- Lessons learnt and suggestions for improvements

Coaching Activity Report

At the end of each coaching session, you may like to complete the Coaching Activity Report to track what was covered in the session and self-evaluate your performance as a coach.

This report should be prepared immediately after completing each coaching session. This is a summary of the coaching session and should highlight key issues, progress made and activities covered. This report is for your benefit and does not need to be shared with your client.

The following page shows a guide to completing the Coaching Activity Report.

Remember

When recording your coaching sessions, document observed behavior, facts and data, not feelings. This is especially important if your client is not performing as expected.

Don't record: "I am upset with my client's performance"

Do record: "The month ending January 31, client failed to meet the minimum number of sales calls per month that we established in the action plan created December 7th."

Coaching Activity Report

This report should be prepared by the coach immediately after completing each coaching session. This is a summary of the coaching session and should highlight key issues, progress made and activities covered.

Is this your first session with the client? Third? Tenth?

Client:	
Date:	
Coaching session number:	
Location:	
Duration:	

1. Objective of the session
   (What was the main focus of the coaching session, any specific emphasis)

This may include relevant information not captured on the Action and Skills Development.

2. Activities and key achievements identified with the client
   (Bullet point summary of client achievements or difficulties)

3. Progress in achieving Action and Skill Development Plan activities
   (Identify changes and progress with implementation action plans and provide supporting evidence)

4. Significant issues or problems encountered
   (Barriers to progress such as logistics, resources, timing)

5. Skills gaps or needs identified
   (Subjects / topics where the client needs assistance or areas where staff need improvement. Areas where the client could be helped through other business development services like exposure visits or training. Could include business planning, systems, employment best practices etc.)

Record information that will be useful for you when you prepare for your next coaching session with the client.

6. Follow up points / areas to revisit in next coaching session

Your personal views. Record here if there are any challenges in the coaching relationship, and how you plan to overcome them.

7. Any other comments / feedback on the client

Self-reflection on your performance as a coach. If you are also filling in a portfolio log, feel free to copy and paste between it and this question

8. How do you feel you performed as a coach? What pleased you, and how do you think this session could have been conducted even better?

Practical Approaches to Guiding Clients

Coaching sometimes involves guiding your clients how to perform a particular task. This may be something that you have the expertise to show them, or it could require involvement of a suitably qualified third party.

Three common ways of doing this are by explanation, demonstration and through practice.

Explanations make clear the causes, context and/or consequences relevant to a set of facts or particular situation. Explanations stimulate understanding of the link between cause and effect, problem and solution. This helps with knowledge transfer to other situations.

Demonstrations show the client, step by step, how to perform the task and repeat steps if necessary. Demonstration offers a visual pathway to learning and teaches theory along with practice.

Practice allows the client to perform the task with your guidance. Practice increases autonomy and continued practice makes it more likely that the information or skills will be retained.

These methods can be used in conjunction with one another. Demonstration is a particularly powerful learning tool as it combines both listening and watching. It becomes even more effective when it is followed by practice (both guided and independent).

When using explanations or demonstrations, follow these best practice tips:

Explanations	Demonstrations
Plan what to say in advance	Keep the demonstration simple, focus on one or two key points
Keep instructions clear, simple and brief	Ensure you can be clearly seen and heard
Keep it lively and engaging	If possible, do the demonstration in the same location that your client's would use
Use non-verbal communication	Repeat as necessary
Check understanding by asking questions	Check understanding by asking questions

Identifying Gaps

Through ongoing performance monitoring and evaluation business coaches will identify areas where the client needs additional skills support. Once these needs, often called 'gaps', are identified, the coach can help the client fill them by facilitating access to training or other business development services. This can help the client, and their staff, accelerate the use of new skills and knowledge that supports implementation of the action plan.

How to identify gaps

Through the assessment of KPIs and completion of the action plan you will identify areas for training and development for improved performance.

In the example of OPIs in Section Three: Coaching Models we saw that the client was underperforming in marketing materials and HR management & training. These are skills gaps where the client needs additional support.

Operational Performance Indicator	Description	Visit 1
Marketing materials	Brochure, business cards, photos/videos, guest book, product description, professional	1
Human resource management & training	Diversity and inclusive employment, part-time jobs, flexible roster, seasonality adjustment, on the job training, internal promotions	2

You can also use a formal, systematic process to identify and evaluate training needs called a Training Needs Analysis (TNA). This is also known as a Gap Analysis.

What is a Training Needs Analysis (TNA)?

A Training Needs Analysis identifies the root cause of a performance problem and defines the suitable solution. It is a user-centric tool that looks at the human side of performance. The needs may belong to an individual, a group of employees, customers, suppliers etc.

It is often used when there is a suspected knowledge or skills gap that may require training. However, a well-conducted Training Needs Analysis will reveal the underlying cause of the problem, which may not be training at all.

It may be that people know the processes well, but are being slowed down in their work by outdated equipment. In this case, a focus on upgrading equipment would be more suitable than training. Other non-training related issues include understaffing, hiring problems, inadequate equipment, inefficient use of resources, unclear expectations etc.

Example

The manager of a travel company is disappointed with the number of sales. He wants to provide more training to his sales team. The TNA reveals that the team are actually confident and competent in their work, but are slowed down by outdated IT systems. Here, investing to improve the IT systems would be a better solution than staff training.

Why use a Training Needs Analysis (TNA)?

A TNA can:

- Identify the underlying performance problem (the 'gap')
- Identify if training is a suitable solution
- Identify what training is required and for whom

The benefits of a TNA include:

Improved learning and retention as the training is targeted and can be customised
Proactively reveal problems and address them before they become critical
Reveal previously unknown Training needs (and other issues)
Feedback involved provides valuable business insights

A TNA helps you target the right people with the right information. Pinpointing the root cause of a performance issue and identifying a tailored solution can save time and money in the long run.

The TNA identifies areas for skill development across the business. It should be evidence based and may include data and information from:

- Self-assessment
- Customer comments and complaints
- Surveys and statistics (e.g. number of sales, website visits, social media followers)
- Workplace health and safety issues
- Use of technology and tools
- Observation, reports and research
- Consultations with team members and leaders
- Interviews and focus groups
- KPI assessments and evaluations

As a business coach you might provide advice to clients on the most suitable workforce development strategies to fit the skills needs identified by a TNA. This advice should consider costs, benefits, logistics, access and availability.

Such workforce development strategies could include:

- Applying best practice and research, tools and technologies
- Coaching and mentoring
- Conferences and forums
- Distance and online learning
- Induction and onboarding
- Job descriptions - design and/or update
- Knowledge transfer
- Leadership development
- Networking and events
- Performance management
- Public speaking and presenting
- Buddying and work shadowing
- Change management and communication
- Recruitment and selection
- Referrals to other programs and learning opportunities
- Remuneration and wages
- Restructuring or work redesign
- Retention, reward and recognition
- Skills training
- Succession planning
- Training on and off the job
- Webinars and workshops
- Work based learning and project based learning (action learning)

The process

The process of a Needs Analysis involves understanding the current situation, the desired situation and the gap that exists in between. Then asking the questions of what training is required to fill that gap?

Step 1: Determine the desired outcome (and desired standard of performance)
Step 2: Determine the current outcome
Step 3: Determine the cause of the gap and offer solutions

Remember

Asking the right questions is crucial in a Needs Analysis. If you don't truly understand what the challenge is, you cannot solve it. You might solve a different problem, or only a symptom rather than the real problem meaning the same issue is likely to reoccur. Do:

- Gather as much information as possible
- Interview different sources
- Use the same language when interviewing - a small change in wording could lead to different interpretations
- Spend enough time getting clear on the client's 'ideal state'. Without an idea of what success looks like, you cannot reach it.

See the Toolkit for further information on using a Training Needs Analysis.

Support Services

After the need is identified, it's time to take action. This may involve the introduction of other business development services, such as training and exposure visits.

The Action and Skills Development Plan should be updated to reflect the information gathered in the needs assessment.

Training

Within the tourism and hospitality sector, the following are common training needs. Training can be addressed in parallel with the ongoing business coaching.

- Tourism sector knowledge – location, key assets and attractions
- Product & business development and planning
- Marketing (e-tourism)
- Quality standards
- Customer service
- Business management
- Language skills
- Human resource management
- Financial management
- Safety and security including business continuity planning

Capabilities and skills for the business overall should bec continuously reviewed and any newly identified gaps or skills development should be recorded in the action plan.

Exposure visits

Sometimes it is difficult to understand what is possible, what could be done, if you have not seen how it is done better elsewhere. Exposure visits are an opportunity for clients to see and learn from higher ranking / performing businesses.

They can be very effective at opening clients' eyes to possibilities and best practices.

The benefits of exposure visits include:

- Clients' eyes opened to possibilities beyond what they thought was possible
- Greater understanding of quality through experience, rather than explanation
- Communal knowledge sharing and peer-to-peer learning
- Opportunities for peers to discuss, inquire and find solutions to issues that may have been affecting their businesses

Example 1:

Akila is the owner of a small hotel. He is keen to charge a higher price point but is reluctant to spend money to upgrade his rooms. Currently he offers only basic linen and charges extra for blankets and towels. Previous feedback on Tripadvisor has shown guests expect these to be included in the room rate and would prefer higher quality.

The coach facilitates an **exposure visit** to a nearby highly-rated hotel where they use high quality sheets, towels and provide soap and shampoo. Here Akila can touch and feel the difference in their products. He then understands how investing in these items would improve the experience for his guests.

In this context, the visit is more effective than the coach describing the products, since quality needs to be experienced, not explained.

Example 2:

Aisha has a homestay business. She has a sizable garden, and grows a lot of vegetables. The beds are productive (tomatoes, aubergines, ladies fingers, chillies etc.) but not really tidy, the garden is also used as something of a junkyard. There are some flowering bushes but they are rather wild, and there is no sitting area. Aisha believes a garden is just somewhere you grow food, not an attraction.

There are several hotels which make a feature of a vegetable garden, and have manicured grass and bushes, with nice seating areas. The coach facilitates **an exposure** visit to meet the head groundsman in such a place. Here Aisha can see the value in making the garden beautiful and comfortable, and gets ideas about how to do it on a smaller scale at her home

Remember

An exposure visit will not be ‘industrial espionage’ (spying). It will be set up with the host’s agreement, by appointment and will be a win-win situation, where two (or more) business people share ideas and discuss the market, trends, possible future developments and ways to exploit them.

Value add services

As a business coach, you can also use your expertise and knowledge to help you clients identify opportunities for growth and diversification. Frequently this requires supporting clients to undergo a mindset shift, to see how value added services can enhance their business models.

Seasonality is one of the challenges in the tourism industry in Sri Lanka. For example, the east coast receives many visitors from May to September, but far fewer from December to March when beach-loving tourists tend to visit the south. Helping tourist businesses to maintain operations during all seasons would have a significant impact on business performance and enable them to retain skilled employees all year round.

Value add services include:

- Offering e-tourism (such as virtual safari tours)
- Expanding business services / product ranges
- Linking with other tourism businesses / providers

Example 1:

Chanith is the owner of a guest house near Tangalle. It is usually busy during the peak tourist season when tourists come to enjoy the beach and sea, but during the rest of the year receives few bookings. The guest house is located near Bundala National Park, an area abundant in bird life.

Through business coaching, Chanith identifies an opportunity to attract guests all year round who are interested in bird spotting. He partners with a local tour guide to offer 2-night, 3-day “Wildlife Weekends”, which include bed, breakfast, dinner (half board) and 2 guided walks. For each weekend, he pays the tour guide a fixed amount. They also give guests the options to purchase other tours with the same guide for an extra cost.

Now he has a niche product that he can market in a targeted way through online wildlife groups and bird watching clubs all year round. After completing several successful Wildlife Weekends, he creates a bird-spotting booklet with photos that he sells to guests for an additional Rs 500.

Example 2:

The owner of a beauty salon identified a new income stream by adding the sales of products (brushes, nail polish, foot scrubs, hair oils etc.) to her existing in-salon services. She focused on products not sold by other local competitors. By doing this, she increased her sales, and increased loyalty among her customers as they return to her salon when they need to buy replacements.

Performance Measurement Tools

Fishbone Diagram

A Fishbone Diagram is a tool to find the root cause of a problem. It is a visual brainstorm of possible causes for a problem. By considering many possible causes and categories, the diagram helps identify multiple factors that could be contributing to the issue, and to focus on the root cause of the problem.

The diagram is called a Fishbone as this is the shape it resembles. The 'head' of the fish is the problem, usually written in a question form. Coming off this are the 'bones', categories of possible causes. Written alongside the 'bones' are the causes that are part of the category. There can be as many categories and causes as required, although having too many could make the diagram cumbersome.

Why use a Fishbone Diagram?

A Fishbone Diagram can:

1. Identify the most likely cause of a problem
2. Provide clarity and help a team or a group to collectively understand the problem
3. Identify multiple causes and assist with prioritising which to resolve

The benefits of a Fishbone Diagram include:

- Creates a shared understanding of the problem
- Applicable to a broad range of problems
- Simple to use and understand, clearly shows the relationship between cause and effect

The process

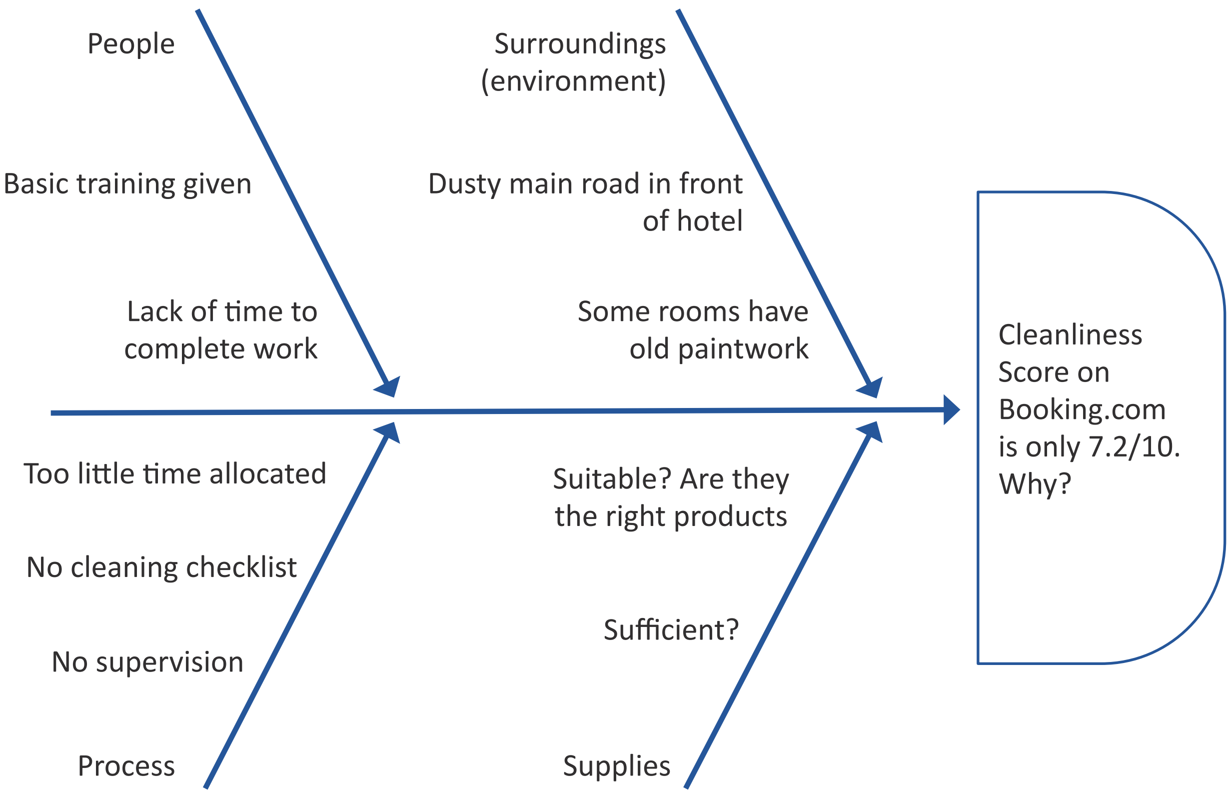
The Fishbone diagram provides a means to identify the root cause of a problem through brainstorming possible causes.

Step 1: Define the problem. Usually in the form of a question
Step 2: Define the categories you will use in the brainstorming
Step 3: Brainstorm each category with many possible causes. Did deep to uncover the true root cause
Step 4: Analyse the results. Evaluate and prioritise them and take action

Example

The Singing Fish Guest House has a problem. It is scoring only 7.2 out of 10 on Booking.com rankings for cleanliness. This is dragging down the overall rating as other categories are scoring 8 or 9 out of 10.

The coach and Kannan, work through a Fishbone analysis to identify possible causes of the low cleanliness rating.



After digging down, Kannan and the coach agree that the root cause is likely to be a lack of training and knowledge of the cleaning standard expected. They agree an action plan for Kanna to create a cleaning checklist, upskill the cleaners and supervise for 4 weeks, or until the standard improves.

SWOT Analysis

A SWOT Analysis is a common tool in business coaching and can be used in problem solving and future planning. It is useful as a means to assess the business's current situation, before making decisions on new strategies or committing to action.

What is a SWOT Analysis

A SWOT Analysis is a matrix with four sections:

1. **Strengths** - internal assets, capabilities and competencies
2. **Weaknesses** - internal insufficient requirements and difficulties
3. **Opportunities** - external positive influences which support the business
4. **Threats** - external negative influences on resisting the business operation.

The matrix helps businesses understand all the factors in play when making a business decision. Including what is already going well (strengths), where improvement is needed (weaknesses), areas that can be capitalised on (opportunities) and areas that need defense (threats).

SWOT Analysis is a versatile tool. It can be used at an organisational level to assess how the business is aligned with its success benchmarks. It can also be used to assess performance of a particular project or department, for example how well a hotel marketing campaign is performing against expectations.

S Strengths	**W** Weaknesses	**O** Opportunities	**T** Threats
Things your business does well	Things your company lacks	Underserved markets	New competitors
Qualities that separate you from competitors	Things your competitors do better	Areas with few competitors	Changing regulatory environment
Internal resources, like skilled staff	Feedback areas for improvement	Emerging need for your product/services	Negative press/media coverage
Tangible assets, like property	Resource limitations	Press/media coverage of your business	Changing customer attitudes towards your company
	Unclear unique selling propositions		

Why use a SWOT Analysis?

A SWOT Analysis can:

1. Provide great insight into how the business operates, including areas that are optimal and areas that need adjustment
2. Discover ways to improve weaknesses and capitalise on strengths and exploit opportunities
3. Raise awareness of performance and goals
4. Help identify future goal
5. Provide a comprehensive set of data to build action plans upon

The benefits of a SWOT analysis include:

1. A powerful but simple tool
2. Provides brief but complete summary
3. Works for any size company, or project
4. Can be applied to a wide range of scenarios
5. Methodological and objective analysis
6. Focuses on key external and internal factors affecting the business
7. Provides immediate visibility on areas to take action

The process

In a SWOT Analysis, clients identify lists of strengths, weaknesses, opportunities and threats of particular business. Then steps must be taken to capitalise on the strengths, reduce the weaknesses, make use of opportunities and avoid the risks.

Step 1: Identify the strengths, weaknesses, opportunities and threats and complete the SWOT matrix
Step 2: (Optional) categorise these as internal (within your control) and external (outside your control)
Step 3: Plan and take action based on the information discovered

Examples of internal and external factors.

Internal factors	External factors
	Market trends
Financial resources	Legal framework
Physical resources	Economic trends
Human resources	Relations with suppliers and partners
Current policies, processes and systems	Politics and environment
	Demographics and population factors

SWOT Analysis example

Scenario: Gajnan and Lakshana run a homestay business near Ampara. They have three cabanas which take up about 50% of the space in their garden. Each cabana has a veranda in front, where meals are served. There is no common space for guests to meet, and no information about activities.

There are national parks and bird sanctuaries, and some interesting old temples in their area. The garden attracts many birds and has a small stream running through it, though sometimes there are a lot of mosquitos. The stream may not be there for much longer, though, because there is talk of a big dam being built upstream. There are big hotels in the area, and a few guesthouses, but these are mostly concrete boxes, whereas Gajnan and Lakshana's cabanas use local materials in their construction.

SWOT Analysis:

Strengths	Weaknesses
• Two sources of income give flexibility. • Flexible staffing, with the neighbour helping. • Having a garden and water feature. • Privacy of cabanas, each with a veranda. • Parks/sanctuaries/temples in the area. • The local, personalised feel to the cabanas. Not concrete blocks.	• Lack of common space for guests to meet. • Lack of information on local attractions. • Mosquitoes.
Opportunities	**Threats**
• Promote local attractions, even arrange trips. This could lead to longer stays and more recommendations. • Dam up the stream and make it into a fishpond (it'll still be attractive and the fish will eat the mosquito larvae).	• The dam that is being built upstream. What will happen to the water supply? Will there be other environmental effects?

Remember

It is important to probe the current reality with a client, and not simply accept what he or she thinks are areas to work on, to increase opportunity or to solve a problem. By asking good questions you can come to a mutual understanding, and that is a good springboard for planning actions.

Pareto Analysis

The Pareto principle (also known as the 80/20 rule) says that 80% of your results will come from 20% of your activities. Similarly 80% of issues come from 20% of problems. A pareto analysis is a statistical tool that uses this principle to identify a limited number of tasks that produce significant overall effect. In problem solving, it identifies which problems will have the biggest impact when solved and therefore should be prioritised.

The pareto principle can be used in many different situations, personal and professional. Below are some examples of it in a business context:

- 80% of your profit comes from only 20% of your clients
- 20% of your menu items generate 80% of your profit
- 20% of team members contributed 80% to the success of the project
- 80% of budget is spent on 20% of projects

What is a Pareto Analysis?

Using the Pareto Analysis each problem (or benefit) is given a numerical score based on the impact it has. The higher the score, the greater the impact. In problem solving, resources should be dedicated to the highest impact causes of problems first, as solving these will have the biggest impact.

The analysis is effective when many options are available and specific courses of action need to be selected. It should be used when there is a scarcity of resources, meaning it is not possible to pursue all the options available.

Why use a Pareto Analysis?

A Pareto Analysis can:

1. Facilitate effective prioritisation of possible actions
2. Identify both pain points and value points in your business
3. Enable effective allocation of resources for maximum benefit
4. Produce disproportionate benefits from solutions with the largest impact

The benefits of a Pareto Analysis include:

1. Identification of significant causes for problems
2. Categorisation of errors, defects, customer complaints, quality parameters etc that need attention
3. Graphical display showing the results

The process

In a Pareto Analysis, clients identify the causes or aspects of a problem, then rank them according to the impact. The causes that have the greatest impact should be addressed first.

Step 1: identify and list problems
Step 2: identify their root causes, group the problems together by root cause
Step 3: give a score to each recorded problem, display graphically as percentages
Step 4: add the scores for each group of problems
Step 5: the group with the highest score (close to 80%) should be the highest priority
Step 6: take action to tackle the problems in order of priority

See the Toolkit for further information on how to use a Fishbone Diagram, SWOT Analysis and Pareto Analysis.

Section 9

Business Leadership Skills

Introduction

Leaders have a profound and meaningful impact on the organisations and individuals they lead. They:

- Create a vision for the business
- Motivate and inspire
- Look beyond the day to day running of the business
- Provide a common sense of direction and purpose

As a business coach, you are a leader to your clients. You also help them become better leaders in their own organisations.

This section explains the role of leadership in business coaching, how you can identify your natural leadership style and help your client to become a better leader. It also introduces the idea of Coaching Presence, an important aspect of being a leader as a coach.

What is Leadership?

Leadership is not simply having a title, seniority, or charisma. A business owner who spends all day long shut inside her office away from her employees has the title of 'owner', but she is not a leader. A manager who has worked at a large company for 30 years may have seniority, but if his team does not respect and listen to him, he is not a leader.

Leadership involves positive influence on others and progress towards a common goal.

People are at the heart of the tourism and hospitality sector, and they are also at the heart of leadership. A great leader has followers because of their focus on people and relationships.

Imagine you are the coach of a school cricket team. The team has an important match next week that they need to win, or they will be knocked out of the district competition. You want your team to win and to train hard all this week. Which approach do you think would be more effective?

a. To tell them they must practice drills for 30 minutes every day until the match.

b. To get them to visualise how amazing it will feel when they win, and how proud their family, friends and school will be of the team. To explain how the entire team can work together to prepare for the match and enter into it with a 'team spirit'.

B is far more likely to motivate and inspire the team to train hard before the match, even though it does not specifically instruct them to do so. A is a direct instruction, whereas B sets out a vision of success, a common objective the team can all work towards.

Leadership versus management

Being a leader is not the same as being a manager. The following table compares the two.

Leaders	Managers
Creates a vision and direction	Sets goals and delivers the vision
Inspirational	Methodical
Sets direction and goals	Follows direction and achieves goals
Strategic planner	Operational planner

Leaders	Managers
Thinks about ideas	Thinks about implementation
Embrace risks and recognise the value in failure	Manages and works to control risks
Look for innovation and disruption	Refine what works to improve them
Seek responsibility	Accept responsibility
Asks what and why	Asks how and when
Create high performing teams	Build effective systems and processes

Leadership Styles

The goal of leadership is to drive a team or organisation forward in a positive way and there are many different ways of doing this. In our working lives we have all encountered leadership styles we love, as well as those we wish to avoid. Good leadership often makes the difference between success and failure. It also impacts the team working under the leader - how motivated, energised and happy they are in their work.

The style of leadership will depend on the nature of the business, teams and / or individuals involved. There is no one right or wrong style of leadership.

Below are five common leadership styles. Some will be familiar as they overlap with the coaching styles introduced in Module 2: Basics of Business Coaching. As a coach, you can help your clients to identify the style of leadership that is most suited to them and the goals they are trying to reach for their business.

Authentic leadership

This type of leader is an open book to the people they work with. They are open with their feelings and ready to talk things out. They have a better understanding of the people they work with and the situations they find themselves in. There's never office politics or bias, so they make decisions using data and objective information.

- **Attributes:** Self awareness, transparency, balanced decision making, higher levels of trust and respect in relationships, ethics and values a core part of leadership
- **Weaknesses:** Sharing everything authentically is not always what the business needs, especially during negative or difficult times.

Autocratic leadership

With this type of leader there is no collaboration. The boss has all the power and authority. This can work well for businesses where decisions have often to be made quickly with no time to listen to others. This model also often requires strict supervision of employees.

- **Attributes:** Efficiency, decisiveness, control of decision making, establishes structure and rules, expects discipline
- **Weaknesses:** Works best when balanced with qualities from other leadership styles so employees can still feel empowered. Autocratic leaders may struggle with perceived personal challenges.

Laissez-Faire leadership

This type of leader lets others use their own initiatives and make decisions. In a business with talented and creative people, this works well. Employees can innovate which lets the company grow faster.

- **Attributes**: High level of trust in others, encourages problem solving and autonomy, encourages team to take responsibility, provides support and tools as needed
- **Weaknesse**s: Can be effective with a high performing team, but less so without highly motivated, self-starting individuals. Not suitable for all business models.

Shared (or democratic) leadership

Power is not with one person. This more collaborative spirit makes employees more motivated to work and be productive. And the owner doesn't need to be everywhere since there are decision-makers for every major step or part of the workflow.

- **Attributes**: encourages idea sharing and open communication, supports collaboration, creates an environment of mutual respect
- **Weaknesses**: Typically the pros of a democratic style outway the cons. Possible weaknesses include being less effective for time-sensitive decisions and tensions between holders of differing opinions.

Some leaders will be naturally more task oriented - they prefer to focus on getting the job done and getting results. Others are more relationship focussed - they focus on building staff morale, being supportive and approachable.

Everyone has a unique leadership style, however, as a coach you need to be a chameleon and adapt your style to your clients needs. If your natural style is task-oriented, pay attention to how you can build stronger relationships. If your natural style is very relationship-focussed, learn to focus on tasks as well.

Leadership Attributes

Leadership is a combination of different skills and qualities working together, these are called leadership attributes. They include the ability to:

- Make decisions
- Take risks
- Use initiative
- Bring about change
- Deal with uncertainty
- Understand others and form strong relationships
- Learn from mistakes

The following table compares a good leader and a poor leader.

A good leader:	A poor leader:
Has integrity	Lacks transparency
Communicates effectively	Poor listener
Takes responsibility	Dismisses other ideas
Motivates others	Lacks empathy
Empowers others	Doesn't develop others
Builds relationships	Assigns blame
Sets effective goals	Slow to adapt
Leads by example	Avoids accountability
Has a clear vision	Fails to listen
Trusts others	Doesn't take responsibility
Delegates	Micromanages
Spots opportunities	Avoids risk and failure
A good leader is:	**A poor leader is:**
Self aware	Close minded
Perceptive	Inconsistent
Responsive	Rigid or unadaptable
Informed	Bad at listening
Supportive	Disrespectful
Respectful, and respected	Rude
Intelligent	Selfish
Emotionally intelligent	Afraid to look bad
Articulate	Secretive
Curious	Uninspiring
Reliable	Unreliable
Proactive	Slow to respond

Case study example

Vijie is the manager of a 6 bedroom bungalow outside of Kandy. The hotel is in a beautiful setting high in the hills, surrounded by tea estates. She employs 14 staff, all from the local area, who work in the kitchen, front of house, garden and housekeeping.

Vijie has been the manager for 9 months but feels that the staff do not take her seriously in her work. Often she has to ask them two or three times to do something, and they always find other people to blame or have excuses when there is unfinished work. Housekeeping in particular is a problem. The team frequently show up late for work and Vijie finds herself up at 6.30am every day to check they have arrived and tidied the common areas before the guests wake up. Now they know she does this, they have become even more likely to be late, since she will be around to open up.
Vijie wants the whole team to be happy, to have a great working relationship and she values their insights. She prefers to avoid confrontation, and finds it hard to criticise people. She doesn't want to upset her staff.

How can Vijie address her leadership challenges?

- It sounds like Vijie is struggling to hold her staff to account because her leadership style is very relationship-oriented. This works well in some situations, but here the staff are not respecting her authority (or following her orders).
- Up to now, the staff have been able to misbehave because Vijie prefers to avoid criticism and confrontation, but that is not good for the business.
- Relationships are important, but Vijie should adapt her leadership to include more autocratic elements. This includes expecting discipline and high standards from her staff.
- She needs to learn to speak in an authoritative way and to hold people accountable.
- It is important that Vijie embodies the qualities of a good leader, including leading by example and communicating clearly. She should make sure the staff know what is expected of them, and the consequences if they do not adhere.
- Vijie may need to strictly supervise the staff for a period of time until they are performing their roles to the expected level, and she is confident they will continue to do so.

Decision making

A good leader is able to make decisions. Sometimes they make the decision on their own, other times they may involve employees or other members of management in the process. Different decisions might need different methods.

For example, as the owner of a guesthouse, the way you decide whether to build a new restaurant might be very different from the way you decide what kind of welcome drink to offer guests.

Here are four common methods of making decisions.

Autocratic

Description: One person (or a small group) makes the decision alone.

Effective when:

- Decisions need to be made quickly
- Other team members do not have the skills, knowledge, or experience to contribute to the decision
- Making routine decisions, not important changes

Main advantage: Speed and consistency because one person makes the decisions.

Main disadvantage: The quality of the decision depends on the quality and honesty of the decision maker.

Consultative

Description: One person makes the decision alone after listening to the opinions of others

When to use:

- When the team members, or others involved, have skills, knowledge or experience that the leader does not have
- When the decision is complicated, makes an important change or affects a lot of people.
- When the time to make the decision needs to be controlled.

Main advantage: Involvement in the process can be motivating for the others

Main disadvantage: This method can appear like a ‘trick’, where the leader only pretends to listen to keep others happy..

Consensus

Descrition: Everyone agrees on the same decision together. Can be easier to implement in small groups.

When to use:

- When the decision directly affects many people.

Main advantage: The decision will almost certainly be agreed, accepted and implemented.

Main disadvantages: It may be difficult or impossible, and very time-consuming to reach consensus. There is a risk that what is called 'consensus' is not a real consensus: people say they agree because (a) it's easier, (b) it's quicker, (c) some people dominate the discussion or (d) they are afraid to speak out.

Democratic

Description: The decision is decided by vote.

When to use:

- When a lot of people have relevant skills, knowledge or experience.

Main advantage: The quality of the decision can be high because people with different opinions contribute.

Main disadvantage: Voting can cause people to split into 2 groups (the majority and the minority) which may lead to more conflict.

Developing Leadership in Others

Developing leadership skills in your clients is part of the role of business coach. Clients are typically business owners, managers or entrepreneurs who need to act as leaders, and be seen as leaders to run their businesses effectively.

The following table shows common warning signs to watch out for. If your client displays these, it could mean that they need support to improve their leadership skills.

Sign	Examples
Disorganised	Late for meetings Does not keep proper records
Disinterested	Lacks vision Offers comments that aren't relevant Limited interaction with employees
Not respected or trusted	Tells lies Frequently changes their mind Has favourites among staff Over promises and under delivers
Has issues with taking or giving responsibility	Does not delegate Team members constantly seek approval before acting Micromanages Unwilling to listen to criticism or suggestions Wants all the attention

Questions to develop leadership skills

Consider asking your client (and yourself) the following questions related to leadership.

1. When people are inspired by their leaders they are more confident and empowered to work towards their goals. How do you empower and inspire those around you? How can you do this more?

2. Do you have a specific set of core values (personal or professional)? How much do your actions align with these?

3. How do you hold yourself and those around you accountable to your values and standards as a leader?

4. How can you help your employees / team members to work towards your common goals? Are there any tools, training or support you can provide them with?

5. How do you adapt to change? How can you develop a more adaptable mindset?

Resolute leaders

A resolute leader is someone who stands up for their ideas, plans and decisions in the face of opposition. They are determined, persistent and have learnt to navigate through adversity.

Resolute leaders:

- Know they might face opposition to proposals for development or change, and are prepared to challenge such opposition.

- Are assertive – not aggressive – in responding to others who use their position or power to reject what they strongly believe to be the right way forward.

- Are prepared to use persuasion to argue their case and find strength in adversity

We all come up against barriers and adversity in our professional lives. Some people will be affected by adversity more than others, through bad luck or circumstances. For example, statistically women are less likely to be approved for business financing than men.

Enabling your clients to develop some of the characteristics of a resolute leader - determination, persuasiveness and persistence - can help them overcome obstacles and remain motivated in the face of barriers.

Motivating Others

Great leaders have a desire to grow those around them, especially the people who they manage. They invest time and energy in motivating and inspiring others because they know that this will lead to a more effective team and productive working environment.

Each of us has our own unique motivating factors that make us want to work hard. For some, it is the enjoyment of the work they do, for others, it is the salary they receive, or the praise that comes from their boss.

Motivation can be intrinsic or extrinsic.

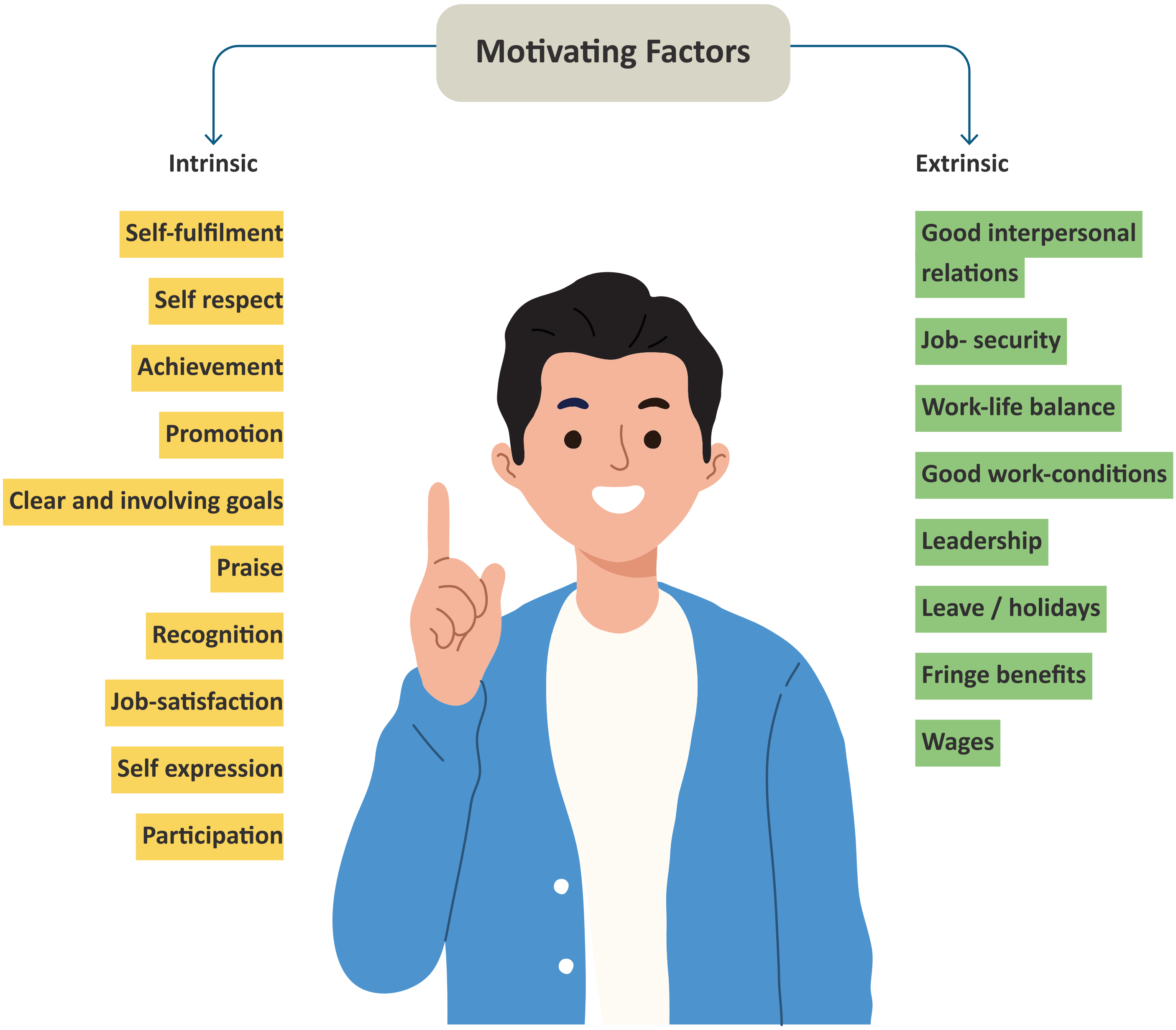
- **Intrinsic motivation** is doing something because it is personally rewarding to you. Your drive to do it is based upon enjoying the activity, and having a match between your skill or capability and what the task demands.

- **Extrinsic motivation** is doing something to receive external reinforcement (such as praise, a promotion or financial rewards) or to avoid a punishment.

For example, person A might attend a cooking course because they hope to get a job in a hotel kitchen. The course will give them the qualification that means they can get hired. This is external motivation.

Person B might attend the same course because they love cooking and want to learn new recipes and skills. They will receive the same qualification at the end, but this is not the reason they are studying. They are driven by an intrinsic motivation to explore and learn a subject they love.

The diagram below shows examples of these different motivators



Two motivating factors

Herzberg's Motivation Theory argues that there are two factors that can be adjusted to influence motivation in the workplace. One increases employee motivation, the other prevents motivation decreasing.

1. **Satisfiers:** These can encourage employees to work harder. Most of these are intrinsic, such as job satisfaction. For example, when people enjoy the work they do, they tend to work harder.

2. **Dissatisfiers**: These won't encourage employees to work harder but they will cause them to become unmotivated if they are not present. Most of these are extrinsic, such as wages. For example, if an employee isn't paid what they think is a fair amount for their work, they are likely to become less motivated.

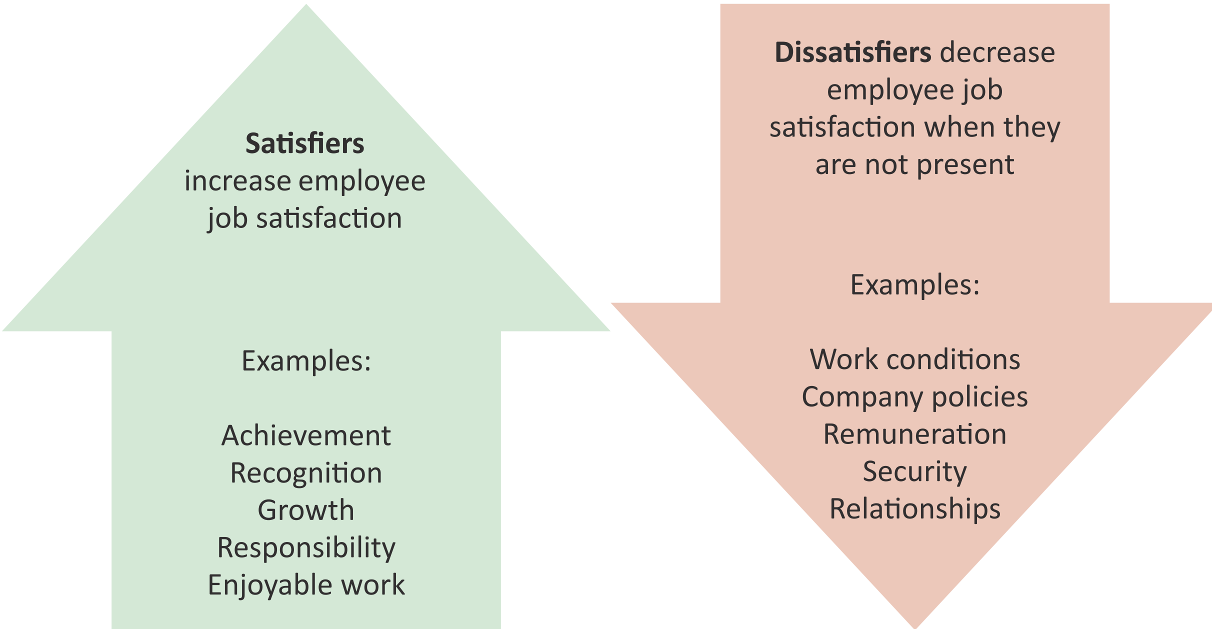


Diagram S9-2: Satisfiers and dissatisfiers

Remember

Some things that seem like satisfiers, are actually dissatisfiers. For example, giving a security guard a raise might act like a motivator for a few weeks, but soon that impact will pass and it will no longer give them the energy to stay alert late into the night. Of course it is important that the working conditions and remuneration are right, but satisfiers like responsibility and recognition of hard work are more effective at maintaining long term motivation.

Tips to improve motivation

To enhance the motivation of a team, follow the below steps.

1. **Examine dissatisfiers and take appropriate action**. Each team member will have their own personal views on dissatisfiers, so work with team members individually to understand their views. Common steps include:

   - Rectify unsuitable, outdated or bureaucratic company policies
   - Ensure salaries are competitive
   - Create a supporting work culture
   - Aim to structure jobs so each team member feels valuable and finds meaning in their work.

2.Boost satisfiers. Increasing the presence of motivating factors should result in overall increased motivation for the team. Common steps include:

- Making jobs more interesting by giving team members more complex or challenging taste to perform
- Giving team members a wider variety of tasks to perform
- Empower employees by giving them increased responsibility. Do this gradually and avoid micromanaging

Remember

Good leaders do their best to make sure their team members get satisfaction from the work they do – even those who are working in low-paid or less skilled jobs like cleaning. Good leaders know the value of praise and recognition, which do not cost anything.

Acting as a Role Model

A role model is someone you respect and whose traits you admire. It may be someone you know personally, such as a family member or colleague, or someone you don't know, like a celebrity or famous CEO. What matters is that when you look at this person you feel admiration, and aim to emulate aspects of their personality or success in your own life.

A good role model is someone who leads by example. For example, a boss who is always patient with their team.

A bad role model is an example of what not to do (or be). For example, a boss who is always late for meetings.

Good leaders are also role models. As a coach, you are uniquely positioned to be a role model for your clients. You can also help your clients to identify other role models in their professional life.

Who is my role model?

A role model may be anyone, alive or dead. Some common role models in the world of business internationally and locally include:

- Indra Nooyi - former CEO and Chairman PepsiCo
- Henry Ford - Ford Motor Company
- Richard Branson - Virgin Group
- Binod Chaudhary - CG Group

Ask yourself these five questions:

1. Who do I admire and respect?
2. What do I admire in them?
3. How do they inspire me?
4. What can I learn from them?
5. How can I apply it?

Role model qualities

Qualities we admire in others are usually the same things that we would like to develop in ourselves. Once we recognise this, we can take steps to develop ourselves.

For example:

- If you admire someone for their excellent communication skills, study the language they use and how they structure speeches or emails. Practice using the same techniques to improve your skills.

- If you admire someone for their ability to connect with customers in three languages, take a course to learn a new language yourself, or work with a translator to create tri-lingual versions of your marketing materials and website.

A good business role model is usually recognised as a leader and has made their mark in an industry or sector. They are typically excellent communicators, who demonstrate confidence while remaining humble.

Once you have identified who your role models are and why, make it your goal not only to learn from them, but to become a role model for your clients and others.

Developing Your Coaching Presence

Coaching presence is a core competency. Put simply, it means being fully present with your client. As the International Coach Federation (ICF) explains, “to be fully conscious and create spontaneous relationship with the client, employing a style that is open, flexible, and confident”.

Mastering your coaching presence will enable you to provide a human touch to your clients in a genuine, safe and non-judgemental way.

Many of the skills and qualities required to have a coaching presence are also found in great leaders. These include:

- Being empathetic, present and flexible
- Being open to not knowing and taking risks
- Confidently exploring other perspectives and possibilities

Communication and relationship building skills are important aspects of coaching presence, but it also goes beyond these. Someone with a coaching presence will show up for their clients in the following ways:

1. With power and influence, not as a mere observer. The coach is a catalyst that supports the client to do hard work.

2. On behalf of their client, with their client’s best interests in mind. The coach supports the client in achieving their goals, which is not the same thing as making them happy.

3. With dedication to the coaching process. Without distractions the coach creates a safe space for the client’s development to take place.

Section 10

Giving Feedback

Introduction

Feedback is an integral part of coaching. Through feedback you can make your client aware of their achievements and setbacks. It can be encouraging or discouraging. As a coach, you will be constantly providing feedback, whether you are aware of it or not.

In this section you will learn how to give effective feedback and how to overcome barriers to feedback, such as clients feeling defensive or dismissive.

This section also covers how to handle the end of your coaching relationship, including the final coaching session and obtaining feedback on your performance as a business coach so you can continue to improve.

Feedback

The most effective feedback requires empathy, strong communication skills, and trust.

With these three pillars of the coaching relationship in place, feedback becomes easier to give, and to receive. Your client will understand that the feedback you give is to help them progress towards their goals.

Feedback can be given in any number of ways including:

- Body language e.g. nodding, facial expressions, smiling, frowning
- Brief comments e.g. 'yes', 'no', 'try again'
- Self-reflecting questions e.g. 'How do you think you're progressing?'
- Guiding comments e.g. 'You are doing well but maybe you could ...'
- Results of a test or assessment

Why is feedback important?

"We all need people who will give us feedback. That's how we improve"
Bill Gates

High quality feedback is one of the most critical components of business coaching. The purpose of feedback is to improve the situation. Almost by definition, a client who seeks business coaching wants feedback. They want to know how to improve on some aspects of their business or performance. In depth, constructive feedback can help your clients define their plan of action and achieve their goals. Effective feedback can improve:

- Engagement
- Motivation
- Job satisfaction
- Performance
- Relationships

Feedback provides the means to learn and grow. It supports innovation and creativity. Ongoing, effective feedback provides a sense of security as the receiver knows what their strengths and weaknesses are, and exactly what is expected of them.

The role of the coach in giving feedback

Feedback is about future performance. We can't change what already happened in the past, but if handled correctly, mistakes can become the first step to learning and improving.

Between the coaching sessions, your client will try to implement the changes you discuss with them. They need to receive constructive feedback on their performance and efforts to reach their goals.

When giving feedback, the coach acts as both a role model and an agent of change. You encourage the client to think about the situation in new ways and to develop new responses, or to reinforce positive existing qualities.

There are three common motivations for providing feedback:

1. **To change behaviours**: to help others understand and improve their performance

2. **To compare performance**: to help others understand where they are in relation to peers, or their own performance in the past

3. **To celebrate success and motivate:** to motivate and encourage others. This feedback can help build relationships and resilience.

Giving feedback is like holding a mirror up to someone, so that they can see the impact a specific behaviour is having, and when a change will lead to better results.

Top Tip

Try to give feedback verbally and in person where possible to allow for the two-way dialog. It is easy for written communication like emails to be misconstrued and for the receiver to feel offended or defensive.

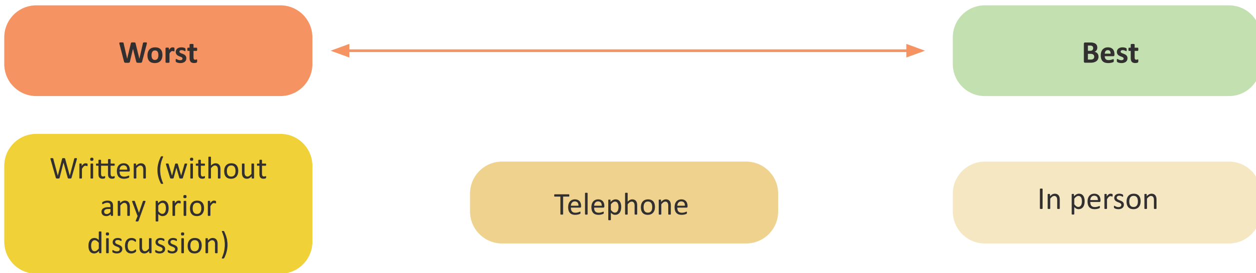


Diagram S10-1: Types of feedback

Types of feedback

- **Informal feedback** is typically verbal and often happens in the moment. Examples include ad-hoc conversations or 'water cooler moments'.

- **Formal feedback** typically takes place in meetings or in written communication. Examples include reports, reviews of KPI results and targets.

Effective feedback is **Constructive**. It is specific advice that addresses a particular issue with the goal of promoting change in behaviours that detract from high performance.

Constructive feedback can be positive or negative. In both cases it has a focus on agreeing solutions for the future.

- **Positive feedback** is telling someone what they are doing well, or what is working. It can be specific praise or focus on reinforcing desired behaviours that promote high performance. It typically leads to an increase in self-confidence.

- **Negative feedback** is telling someone what they are doing wrong, or what you don't like. The focus is on promoting change in behaviours that are detrimental to performance. When given poorly, negative feedback can automatically put the receiver into a defensive attitude and instead of looking at ways of improving, they will make excuses or blame others.

Constructive feedback is based on observation or evidence. It is effective because it is objective, non-judgemental and of value.

Criticism, on the other hand, should not be used in coaching. Criticism is a negative opinion, statement or judgement about the person or their work. This type of feedback is destructive and does not help the other person improve the situation.

Silence is also a type of feedback. When no response is offered, silence has the effect of maintaining the current state or conditions - unless the client is expecting positive feedback. In such cases, when they are greeted with silence instead, it can reduce their confidence and performance.

What makes feedback effective?

Feedback can be incredibly helpful when people want to grow. But not all feedback has the intended beneficial effect. The way in which feedback is given is just as important as the content. Effective feedback helps the client progress towards their goals and make positive changes.

When giving feedback to your client:

1. Ask permission first
2. Be specific
3. Be non-judgemental
4. Be mindful of your body language
5. Explain the impact

The table below details ten qualities of effective feedback.

	Quality	Description
1	Timely	Give the feedback as soon as possible after the event, when it is important, relevant and fresh
2	Ongoing	Not a single event / conversation that is not spoken of again
3	Sincere	Mean what you say, and say it with care and respect. Avoid cliches and "yes, but" messages that dilute the sincerity of the intended message.
4	Direct	Give the feedback in a straightforward manner
5	Honest	Based on facts and behaviors, not on personal factors
6	Two-sided	Avoid giving a lecture to your client. Ask their views and engage your client in self reflection
7	Non-judgemental	Offer a description of what you saw or experienced, rather than a judgement.
8	Important	Identifies an area or goal work working on, not 'nit-picking' unimportant things
9	Supported	Supports the individual without taking away their responsibility
10	Valuable	The feedback you give should be meaningful to the client in terms of their intended goals and outcomes

Giving Feedback

One of the core skills of coaching is to be flexible. This is also true when giving feedback. Different approaches will work best with different clients.

The following table details two common approaches to giving feedback: collaborative and guided.

	Collaborative approach	Guided approach
Useful for	Promoting autonomy. Encourages the client to think like a coach	When the client cannot provide their own solution. Leads them away from repeating unproductive behaviours
Style	Conversational	Descriptive
Step 1	Identify the behaviour to be improved or reinforced. Be specific	Describe the specific behaviour. Use the phrase, "when you ...."
Step 2	Describe the effect on the coaching relationship, or on the client's business or personal life	Describe your suggested alternative behaviour. "You might consider doing this ..."
Step 3	Check for understanding using open ended questions	Describe the benefit or gain that they will move towards. "This will help you ..."
Step 4	Ask how the behaviour could be changed, improved or continued	Describe the unproductive consequences they will move away from. "And, it will help you avoid ..."

Tailor your feedback

Certain types of feedback styles may be more suitable for different individuals. There is no single approach that is equally effective every time.

Consider the skill level for the client you are coaching.

If they are a senior employee, experienced professional or business owner they may welcome brutally honest feedback that shows exactly which areas they need to change. Often the more expert people become, the more they value negative but constructive feedback as a tool for growth.

However, if you are coaching an individual who is earlier in their career, or starting out in a new business sector, they may benefit more from feedback given in a highly encouraging, positive manner. As they pick up more skills and gain confidence, you can tailor your approach to feedback accordingly.

Example A: Collaborative Approach

Kimali was a senior employee in a retailing company selling clothes, textiles, fabrics and crafts to tourists. Later, she opened her own shop and sold similar goods. Recently, she started a new tourist-orientated restaurant. She hired a business coach because she is unfamiliar with this field and wanted someone to observe her and give advice. Her coach feels Kimali is very professional and efficient, but doesn't always listen to advice.

Because Kimali seems experienced, independent and aware of her goals, her coach decides to take a collaborative approach. Experienced clients often welcome direct and honest feedback that tells them exactly what they need to change to improve.

Here's how the coach might begin to give collaborative feedback:

"Kimali, let's talk about your marketing and how it can be improved to increase the chances of success. I'm sure you understand the important role marketing plays in getting customers to your restaurant." [wait for Kimali to reply] "Let's brainstorm ways you can improve what you're already doing."

Example B: Guided Approach

Ravi is a boat owner, sailor and fisherman who has started an aquatic tour company taking tourists on whale-watching and deep-sea fishing trips. He is still early in his business career and this is the first time he has started his own business venture. His coach feels he is a good learner and can pick up new skills quickly, but he lacks confidence. Also, Ravi is nervous because the stakes are high for his new venture. If it fails, he will lose a great deal of money.

Because Ravi is inexperienced and lacks confidence his coach decides to take a guided approach. The coach makes sure he is supportive and non-judgemental when he gives Ravi feedback. Since Ravi is a quick learner, the coach aims to introduce a more collaborative approach where he encourages Ravi to identify the problems and solutions himself later on.

Here’s how the coach might begin to give guided feedback:

“Ravi, when you prepare your marketing materials, try to have a few key points and support them with photos or graphics. Visuals help you get your point across powerfully and effectively, and photos will show potential visitors what beautiful sights they can see on your tours.”

Questions to prompt feedback

People are more likely to engage with solutions they have thought of than ones they are given. Powerful questions can help a person clarify issues, confront surprises, and develop a clearer plan for improvement.

Use the following questions to prompt your client to provide their own feedback.

1. What did you notice about your performance?
2. What went well?
3. What challenged you?
4. May I tell you what I liked?
5. If you could do it again, what might you do differently?
6. What will it be like if you can do that?
7. Can I make a suggestion?
8. Can we discuss __ further?

Remember, feedback is only the first part, it must be acted on to be an effective agent for change. Next ask your client:

9. Did any of the feedback you received surprise you?
10. What has feedback taught you about opportunities for improvement?
11. How will you use the feedback data you receive?
12. What changes would you like to make?

Tips on giving feedback to clients:

As a coach, you must be able to give objective feedback in a non-judgemental manner. The goal is not to make your client feel bad about what they are doing, but to help them find solutions and new ways to improve.

- **Prepare**. Sometimes feedback will be in the moment, other times you will be able to think about what you are going to say in advance. Be clear in your mind on the impact and outcome you want the feedback you give to have.
- **Be fully present.** This is an important conversation that should be treated with respect. Practice active listening and build trust.
- **Practice empathy.** Receiving feedback can often trigger emotions. To give feedback effectively, consider the emotional responses it may evoke in the other person, and tailor your approach to be empathetic.
- **Create a safe environment** in which to deliver the feedback in a supportive manner

Remember

Feedback is given to encourage goal attainment and to improve performance, not to blame or criticise.

Barriers To Feedback

It isn't easy to receive feedback. People don't like feeling that they are doing something wrong, so it is important to deliver feedback in the right way.

Feedback can trigger strong emotions and defensiveness. Even when you take all the right approaches to giving feedback, some clients may still react in a negative manner. They may reject the feedback outright, they may become defensive or immediately try to justify their actions.

Our brains have an in-built negativity bias which places more emphasis on negative feedback than on positive. This is something that authors and musicians know well - they often remember the one bad review much more clearly than 99 positive ones. This negativity bias means that we can be resistant to feedback even before the feedback conversation has begun.

People may be particularly sensitive to feedback when:

- The stakes are high as the matter is of significant consequence
- They have low confidence in themself
- They have a fixed mindset and/or believe that change is not possible
- They feel they are being judged or ciricitsed

If you find your client has put up a barrier to feedback, try the following approaches.

- Remind them that the feedback is just information. It is not a judgement or a statement of their worth as a business owner or entrepreneur.
- Explain that rejecting feedback generally means rejecting change. If they don't want to change, what do they hope to get out of the business coaching? Explore this in a sensitive manner.
- State that they don't appear to see the feedback as helpful, and ask them how they would like to proceed.
- If feelings and emotions become too strong (yours or the client's) take a break from the conversation. Resume once you have both gathered your thoughts and are able to be cooperative.
- Always remember to remain calm, professional and to communicate clearly. See Section 12: Advancing as a Coach for more information on overcoming communication challenges in the Coaching Relationship.

Feedback Do's and Don'ts:

Do	Don't
✔ Be targeted	✖ Be vague
✔ Keep it short and focussed	✖ Wait a long time after the event
✔ Focus the discussion around solutions	✖ Personalise the discussion, be objective
✔ Choose a private setting	✖ Give feedback in a public place
✔ Use specific examples	✖ Lecture
✔ Prepare	✖ Use ultimatums or threats
✔ Collaborate - ask your client for their response and views	✖ Allow your emotions to influence the conversation
✔ Give feedback frequently	✖ Be judgemental
✔ Remain calm and professional	✖ Criticise or scold

Avoidable Coaching Challenges

Think of a time you coached, advised or gave feedback to someone – unsuccessfully. Your efforts didn't have the desired effect and the person's behaviour or performance didn't improve, or it got worse, afterwards.

The situation can be the fault of one person, or both. Being aware of common, avoidable challenges and how to handle them will help you minimise the likelihood of this happening in your business coaching relationships.

The table below details coaching challenges and possible corrective measures.

Challenge	Description	Possible corrective measures
Temptation to 'spoon-feed'	It is easy for coaches to fall into the trap of giving clear instructions to clients. It can be tricky to strike the right balance between allowing clients to reach their own solution and making sure they stay on the right track, but this balance is crucial.	Rather than telling the client what to do, try sharing several possible solutions and their pros and cons. Allow the client to decide what action to take. As the client becomes more confident, switch back to them suggesting solutions.
Lack of commitment from client	The client does not really commit to the coaching relationship, or views it as of little value.	Discuss with the client what they hope to get out of the coaching session. Try to motivate them to see coaching as a means of reaching their goals.
Poor or ineffective communication	The client cannot accurately express to the coach what they want or need from the coaching.	Understand which communication style and approach will work for this client and tailor your coaching accordingly.
Dependence on the coach	The client relies on the coach to handle tasks and take responsibility.	Setting expectations is crucial to avoid this. Make clear what the coach/client relationship is and reinforce this during your coaching conversations.
Lack of direction from client	The client doesn't know what they want to get out of the coaching.	Take the lead to create a structure for success. Use the Baseline Profile Form and KPIs to identify focus areas. Use a coaching model such as TGROW, and ask open ended questions to elicit from your client.

Final Session

As you come to the end of the coaching journey with a particular client, is the ideal time for your client to reflect on their progress and accomplishments. It can be a celebration of the milestones, big and small, as well as an opportunity to provide direction for their next steps.

Since this session will be a different format from the rest of your sessions, it is usually seen as a separate step in the coaching process. The purpose of the final session is to review and solidify what the client gained from their coaching experience and to set them up for life 'post-coaching'.

During the final session, encourage your client to:

- Reflect on progress
- Ask any outstanding questions
- Celebrate successes
- Identify lessons learned
- Consider what their new goals are for the future
- Evaluate their progress
- Evaluate your performance as a coach

You should also tie up any loose ends that have come up during the coaching process and have not been dealt with yet. You want your coaching relationship to close on a positive note, so ensure everyone is on the same page.

Wrap-up

How you decide to run your final coaching session is your personal choice. Many coaches will dedicate an entire session to reviewing what has been learned and achieved during the coaching.

Powerful questions to ask during your coaching wrap-up include:

- What were your biggest insights during our time together?
- What were your most impactful results?
- What new habits are you going to continue with?
- How will you take what you've learnt and continue applying it?

Post-coaching

After the coaching process is finished, there are several reasons why you may choose to remain in contact with your client, for example:

- To give, or obtain, feedback
- To answer final questions
- To lay groundwork for additional coaching work in future

Collect feedback on your performance as a coach

Feedback from clients is valuable. It tells you what is working in your coaching practice and gives you insights of what you can improve. Including a feedback process in your final session, or shortly after means that the experience will still be fresh in your client's mind.

It is simple and inexpensive (often free) to use online services to create a feedback form asking direct questions. This can be emailed to your client to complete. Consider which questions you want to ask. Make them specific to increase the likelihood you will receive responses with helpful insight.

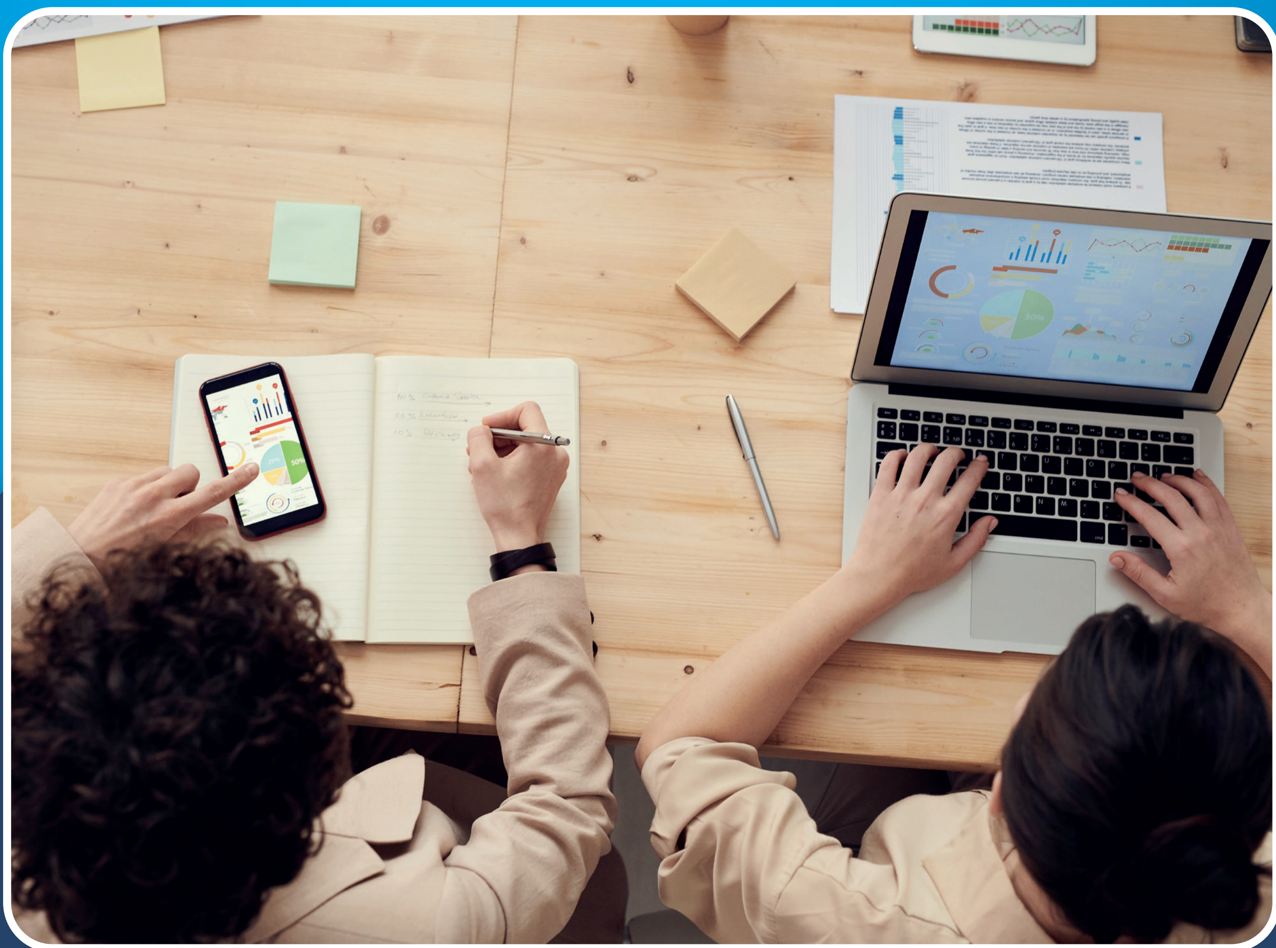
Example feedback questions include:

- What was your favourite part about us working together?
- What was the most challenging part for you about the coaching process?
- What were the specific results you achieved?
- What is the one thing I could have done to make it easier for you to achieve your results?
- How would you rate the coaching in terms of value for money? (Excellent / good / poor)
- How would you rate the level of support you received during the coaching?
- The majority of my clients are through word of mouth. Would you consider writing a testimonial that I could share with other potential clients?

When you finish a coaching process with a client, it is a perfect time for personal reflection on your work. Have you been successful in your efforts to help your client reach their objectives and goals? How could you do better next time? Section 11: Growth Mindset covers self-reflection in detail.

Section 11

Growth Mindset



Introduction

Successful people in all walks of life actively seek out opportunities to grow and improve. They know that doing this has a positive impact on professional and personal success, in both the long and short term.

People who engage with ongoing learning:

- Commit to continually developing their skills.
- Are aware of their strengths and weaknesses.
- Know that developing themselves will not only benefit them as an individual, but also their business or the organisation they belong to.

In this section you will learn some of the key tools for personal and professional development. These include the growth mindset, self-awareness, self reflection and core values.

It also shows you how to use these learnings about yourself to make your coaching practice stronger, and more effective for the individual needs of your clients.

Why is Your Client's Mindset Important?

Research has shown that how we think about ourselves has a profound impact on the way we lead our lives. Believing it is possible to change and improve, leads to greater success.

The desire to keep learning is central to a positive growth mindset.

Ongoing learning is particularly important for entrepreneurs and small business owners who do not have access to the structure and feedback provided in a large organisation.

Entrepreneurs can be left in a vacuum, not understanding what they are doing wrong. As a coach, you can help them fill this gap and make learning a central part of their approach.

Encouraging your clients to engage with continued learning will help them develop as leaders and business professionals. This learning can be formal, such as taking a course, or unformal, such as receiving feedback from peers or employees, and spending time in self-reflection.

Effective coaching can inspire a self-directed willingness to learn and try new things in clients. This is the opposite of a directed or micromanaged approach, where the client (or employee) expects to be told what to do and looks for permission before acting. As a coach, you can help your clients to develop a growth mindset.

The Growth Cycle

What is a Growth Mindset?

Over the last 15 years, the idea of a growth mindset has gained prominence in education and coaching. It was argued by Carol Dweck in her 2006 book ‘Mindset: The New Psychology of Success’ that those who value hard work and learning are more likely to succeed compared to those who believe their abilities are fixed.

A 2017 study by McKinsey&Company of school students across Asia found that the mindset of students was the single most important predictive factor of achievement, far above socioeconomic factors like home and school environment[1].

Research suggests a person’s mindset - how they think about themselves - is a powerful factor in their success.

Growth mindset: the belief that personal success is due to hard work and learning. It leads to a desire to learn, a tendency to embrace challenges and learn from criticism and ultimately, greater success!

Fixed mindset: the belief that innate abilities are static and can not be developed. It leads to a desire to look smart, a tendency to avoid challenges, give up easily and see efforts as fruitless.

[1]*Drivers of Student Performance: Insights from Asia, McKinsey&Company*
https://www.mckinsey.com/~/media/mckinsey/industries/public%20and%20social%20sector/our%20insights/drivers%20of%20student%20performance%20asia%20insights%20revised/drivers-of-student-performance-insights-from-asia.pdf

	Growth mindset	Fixed mindset
Success is:	Stretching themselves to become smarter	Being viewed as smart and superior, having existing abilities confirmed
Failure is:	Not growing. Staying the same	A setback, like getting fired, or failing a test
Feedback:	Pays attention to feedback and areas for improvement. Welcomes discussion of all answers, right and wrong	Likes to hear positive feedback, but ignores areas for improvement. Not interested in discovering the 'right' answer when they get things wrong
When challenged:	Sees areas for learning	Sees success and failure
Might say:	"If I put in enough effort, I can succeed" "What I learn will help me improve my business" "That didn't go well. What can I learn from it?" "I can become a great salesperson with practice"	"I do badly, no matter how much effort I put in" "I can't get any better at marketing, it's not possible" "That didn't go well. I'm a failure" "I am too shy to be a great salesperson"

Case study

Ramesh and Arjuna each run a beauty salon in Mirissa. They used to have lots of business from tourists, but since the pandemic, this business has stopped. Before, they didn't need to market their business because foreigners would walk past and find them. Now, business is very slow.

Both have heard that there are still many foreigners who live in the area. They also know a local pizza restaurant that has been successfully marketing themselves via Instagram.

Ramesh decides to give Instagram marketing a go. He has never used the platform before and feels nervous, but thinks it is worth a try. He doesn't mind trying new things if it may help his salon. He researches online how to set up an account, and spends some time finding the hashtags that are popular with potential clients. He posts his first pictures and waits to see what happens! After all, failure is just an opportunity to learn and improve. Ramesh has a **growth mindset.**

Arjuna has never used Instagram either but he prefers to stick to what he knows. He feels embarrassed at the idea of getting it wrong and thinks, 'imagine if I set up an account and get no business, I would feel like such a failure, my friends would laugh at me'. As a result, he doesn't create an account and continues to hope business will get better on its own. Arjuna has a **fixed mindset.**

Why does this matter for coaching?

The growth mindset says that all things can be developed. Everyone is capable of growth and change.

Clients with a growth mindset will view themselves as capable of improvement. They are more likely to be engaged in the coaching process, to welcome feedback and to support and implement strategies for improvement.

Coaches with a growth mindset, will view their clients as capable of learning and success. They will find it easier to support their clients as they recognise their potential. Coaches with a growth mindset also view themselves as capable of improvement and invest in becoming better at what they do.

How to develop a growth mindset

The good news is that a growth mindset can be taught through intentional actions:

1. Embrace challenges, rephrase them as opportunities
2. Believe you can do it, practice positive thinking
3. Avoid blaming circumstances or others for your own shortcomings. Recognise when you do this and try to identify your area for growth
4. Allow yourself to fail - as uncomfortable as that may be
5. When you fail, identify what you can learn from the experience
6. Reward efforts more than results
7. Be open to criticism and suggestions
8. Change your language. Instead of saying “I can’t do it”, say “I can’t do it **yet**”.

Self-awareness

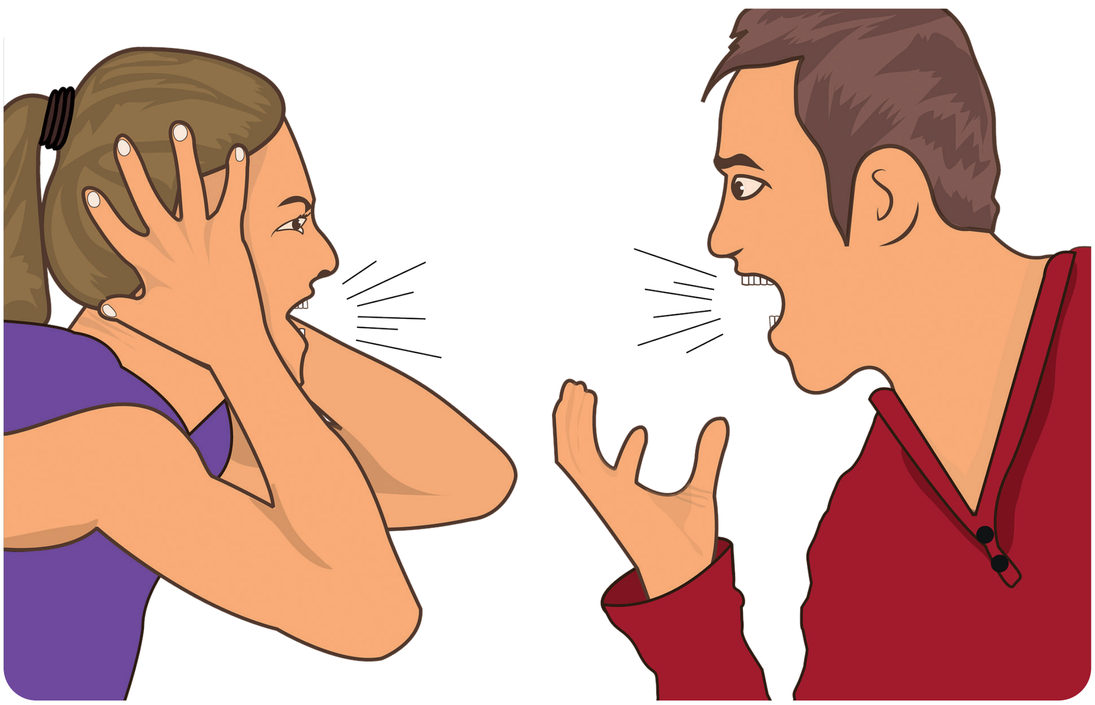
Self-awareness is the ability to see yourself clearly and objectively through reflection and introspection. It is one of the most valuable skills to have as a leader and is critical to success as a coach.

It is common sense that everything you say and do - and everything you don't say and don't do - has an impact on other people. It may be less obvious, but even more important to understand that who you are as a person (your beliefs, values, strengths and intentions) also impacts other people.

Once we understand our internal drivers we can recognise the impact they have on our emotions and actions, and the impact these have on others.

Have you ever made a comment to someone that they took in a negative way when you meant it as a positive? Or vice versa, has someone ever made a comment to you that you found offensive or rude, but was not their intention?

Our words and actions can impact people in ways that are different to our intentions, and in ways we don't even realise. Developing your self-awareness can help you overcome these difficulties, along with many other benefits.



Self-awareness looks inwards as a way of learning to relate to the world better.

- To be an effective coach you must be self-aware
- To help you clients effectively, you must help them become self aware

What is self-awareness?

Self-awareness is the ability to monitor what is happening in our inner world - our thoughts, feelings, emotions and beliefs. We each have a unique collection of experiences and abilities that influence us. Self-awareness allows us to discover our internal drivers and the impact they have on others.

A common description of self-awareness is knowing one's internal states, preferences, resources and intuitions.

The human brain is talented at storing information on how we reacted to situations in the past, so it can be ready to respond should the situation reoccur. By learning to understand our preconceptions and triggers we become self-aware and can make choices of how to respond, rather than reacting automatically.

Self-awareness allows us to evaluate ourselves with a degree of objectivity. It is closely related to the concept of emotional intelligence - the ability to manage our own emotions, as well as the emotions of others.

Someone who is self-aware knows their inner world of thoughts, feelings, emotions and beliefs. In difficult situations, a self-aware person chooses how to react while the unaware person reacts automatically.

Imagine you are stuck in morning traffic...

You hate being stuck in traffic. It makes you angry and agitated, and these negative feelings stay with you after you arrive at work. It takes several hours for you to shake off the frustration the traffic caused.

Now imagine that you take a self-aware approach to the traffic...

You recognise that you don't like traffic. But rather than letting those feelings of anger take hold, you notice them, and decide you will not react. You choose to remain calm and content, perhaps taking advantage of the time you have to listen to a favourite radio station or podcast. You arrive at work ready to begin your day.

Self-awareness allows you to look further than the direct impact of being stuck in traffic, and make an intentional choice that changes your emotions and actions.

Why is self-awareness important?

So many important leadership skills depend on self-awareness. This matters for your clients, as leaders in their businesses, and for yourself as a coach and leader.

Knowing our own strengths and weaknesses is essential to leading effectively. Personality shapes leadership style, which in turn influences leadership culture, which influences organisational culture. Without self-awareness, we struggle to understand others, handle ourselves and create healthy relationships.

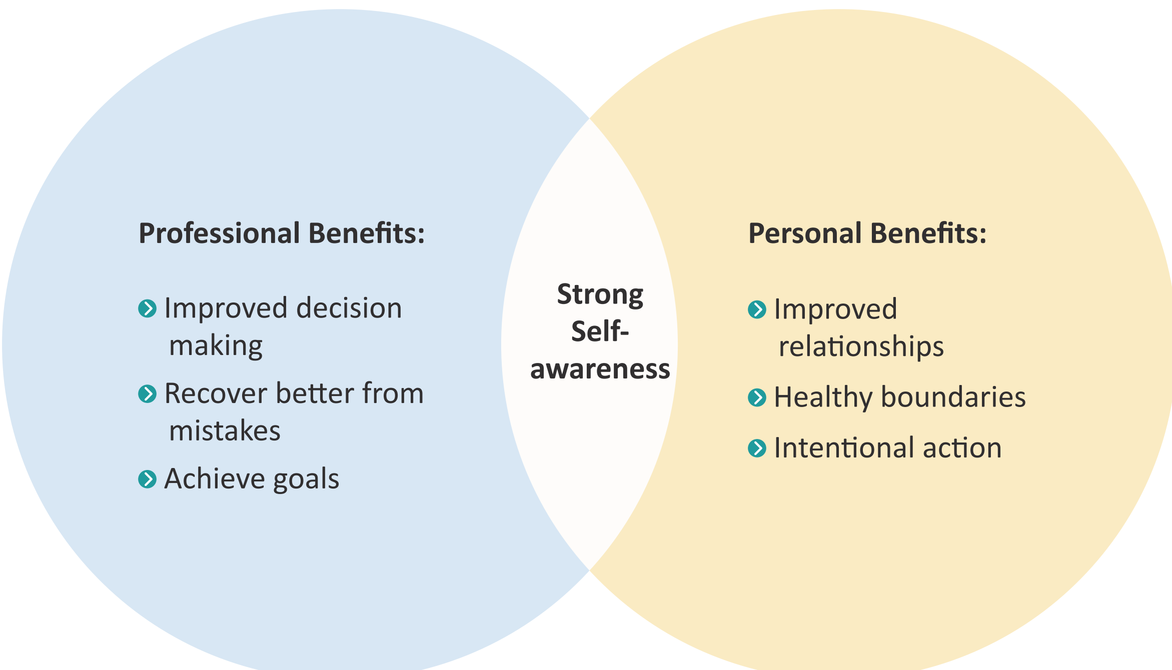
- When your clients have a strong foundation of self-awareness it makes it easier to coach them because self-awareness is at the root of many positive thought patterns and actions.
- When a coach has a strong foundation of self-awareness, it is easier for them to continually improve in their role, and offer more value and expertise to their clients.

Developing self-awareness enables us to manage our behaviours, emotions and thoughts proactively, rather than reactively. It allows us to act consciously and to change our thoughts and the way we view situations. This is an important factor in success.

By developing self-awareness you can:

- Increase understanding of your internal drivers
- Understand your strengths and weaknesses
- Become aware of your blind spots
- Understand how your words and actions impact those around you
- Understand the impact you want to have on others, and make conscious changes to achieve this
- Positively influences others around you

What are the benefits of self-awareness?



The benefits of self-awareness include:

Professional	Personal
Improved decision making Stronger relationships Deeper understanding of motivations and drivers Improved priority and goal setting Ability to view mistakes as opportunities for positive change Better able to deal with the impact of external factors we cannot control	Healthier personal boundaries Increased ability to forgive and let go of the past Stronger relationships Less likely to take things too personally Ability to act intentionally, rather than only reactively Better able to understand the emotions of people around us

What does self-awareness look like?

Self-awareness is a skill that must be cultivated.

Individuals who **lack** self-awareness may find themselves frequently at odds with others around them. They are unaware of the impact of their actions on others. They do not understand why they act the way they do. Lack of self-awareness leads to poor communication, misunderstandings and wasted time.

An individual without self-awareness may think they know what they're doing when they don't. Those without self-awareness are often very confident because they do not recognise their own limitations.

- In a business leader, a lack of self awareness can cause projects to fail, people to quit, and revenues to fall.
- In a coach, a lack of self awareness can cause misunderstanding of the client's situation, damage to the coaching relationship and clients not receiving the support they need.

Conversely, a self-aware leader is conscious of their inner world and has good situational awareness. Not only is their own performance strong, they are also able to elicit the best performance from their employees and team members. They are more likely to ask for feedback and genuinely listen to and trust their team. There is also a knock-on effect to self-awareness. As a self aware coach, you can promote self-awareness in your clients.

Someone with a high level of self-awareness will be:

- Brutally honest with themselves about their strengths and weaknesses
- Aware of their beliefs, values, needs and desires
- Aware of how others view them
- Conscious of the impact of their words and actions on others
- Committed to continually developing their skills

Remember

- Self-awareness is not about judging ourselves harshly. It is an honest, non-judgemental assessment of ourselves.
- It enables us to have a clear perception of our personality, including strengths, weaknesses, thoughts, beliefs, motivation and emotions.
- To be self-aware is to be willing to learn.

How to develop self-awareness

As a coach, and leader, what you say and do matters a great deal to your clients. The following activities may help you develop your self-awareness. These can also be used by your clients.

1. Journal
The act of writing down your thoughts helps you explore what is going on in your mind as you live your day to day life. You can journal about anything. There are many journal prompts available online for inspiration. Revisiting your writings later can provide insight into how certain situations trigger certain behaviours.

2. Actively search out diverse opinions
Try to consume news, information and opinions from a variety of different perspectives. Practice setting aside your own views to focus on truly understanding the views of the other people. Seeing things through many different lenses will help you apply perspective to your own behaviours and thoughts.

3. Consider "why?"
Regularly ask yourself the question 'why'. This will help you gain a deeper level of understanding of your actions, especially the ones that happen automatically. Why do I feel frustrated when X happens? Why do I enjoy my work at the moment? Why do I prefer meeting clients first thing in the morning?

4. Obtain feedback
Proactively seeking out feedback is crucial for developing self-awareness. We may assume we are self aware, but getting feedback from others can often show us things we were unaware of, including where our blind spots lie. Be open minded. Ask others for candidate feedback. Importantly, you must avoid being defensive in response to the feedback you receive.

5. Set goals
Once you become aware of your strengths and weaknesses, set goals and specific actions to harness your strengths and strengthen your limitations. Identify tools and people who can help you in these developments, and track your progress.

6. Take a personality test
There are many personality tests that you can do online that can shed light on aspects of your personality you may not be aware of. Free versions include:

www.16personalities.com
www.profile.keirsey.com/#/b2c/assessment/start
www.discpersonalitytesting.com/free-disc-test

Self-reflection

The ability to reflect and learn from experience is central to becoming an effective coach. This makes self reflection crucial to your coaching practice.

> *"We do not learn from experience…we learn from reflecting on experience."*
>
> John Dewey - psychologist, philosopher and education reformer

What is self-reflection?

Self-reflection can be thought of as an audit of ourselves. When we self reflect we consciously and intentionally think about our actions, goals and behaviour. Doing this allows us to consider what was positive or challenging and, if appropriate, plan how it might be improved or done differently in future.

Self-reflection is centered around questioning, in a positive way, what you do, why you do it, and whether there is a better way of doing it next time.

Why is self-reflection important?

Self reflection helps you to a) develop skills, b) review their effectiveness and c) identify changes you need to make

Imagine you try cooking a new recipe and the dish comes out overcooked or foul tasting. Would you do the same thing next time? Of course not. You would adjust the cooking time or ingredients to try and correct the problem. Self reflection asks us to take a similar approach with ourselves. Rather than repeating the same actions over and over again we look for ways to improve.

Self-reflection encourages us to:

- Take responsibility for what happens in our lives
- Contemplate what we say, what we do and how we act
- Think deeply about our personal and professional practices
- Turn our experience into knowledge that can benefit ourselves and those around us

Self-reflection is important for many reasons:

- As a coach, self reflection enables you to think about, plan and deliver more effective and advanced coaching
- Self-reflection helps your clients learn and gain insight towards achieving their goals. Evoking insight for clients is an essential part of the coaching process.

What are the benefits of self-reflection?

Self-reflection can help you to:

- Link knowledge to experience, in order to improve what you do and how you do it
- Become more sensitive to other individual's backgrounds and needs
- Consciously and purposefully improve your coaching practice in general and through reflection on a specific coaching relationship
- Consolidate your understanding of problems, and develop innovative solutions
- Build your coaching confidence and competence, address anxieties
- Prepare for further coaching accreditation

For self-reflection to be effective it requires you to dedicate time and effort to thinking deeply.

The benefits of self reflection include:

- Increased emotional intelligence
- Personal growth
- Stronger relationships
- Improved decision making skills

When can self-reflection occur?

Broadly speaking, there are two time frames in which self-reflection can take place.

'Reflection-in-action' takes place during the activity, in this case the coaching practice. This might be when the coach faces an unexpected or unknown situation. Reflecting in action involves thinking of solutions or better ways of doing things at the time.

'Reflection-on-action' takes place after the activity has finished. The reflection is with a view to future improvement.

Typically reflection after the event is most effective when done in a quiet space without distractions. Many people find first thing in the morning or last thing at night effective times to practice.

How to develop self-reflection

Considering and carefully answering questions is central to developing self reflection skills.

Below is a list of useful questions.

Topic	Example questions
Strengths	What are my strengths? What activities increase my energy levels?
Weaknesses	What are my weaknesses? What activities drain my energy levels? What are my limiting beliefs?
Skills	What skills do I have? What am I good at? What comes naturally to me? Do I have a growth mindset or a fixed mindset?

Topic	Example questions
Problems	What problems are there at work that may affect me? What problems are there at home that may affect me? What distracts me from my work? Am I holding onto something I need to let go?
Achievements	What have I achieved? What am I proud of? What am I disappointed about? What makes me happy? When was the last time I stepped out of my comfort zone? Have I accomplished my goals from last year? Why / why not?
Solutions	What could I do to improve? How am I using my time? What good habits do I need to have to reach my goals? How much time and resources do I need to reach my goals? Why are these goals important to me?

How to hold a reflective conversation

Reflective conversations involve examining an issue to gain greater understanding and awareness. These can be done individually (e.g. writing in a journal) or with a coach or mentor (who acts as a sounding board and asks questions).

Reflective conversations should:

- Take a questioning approach
- Question values
- Examine practice / actions
- Be fair, accurate and honest
- Critique the issue, not just describe what happened
- Look for meaning using ‘why’ questions

4 steps to self-reflection:

Step	In a journal	With another person
1	Describe - what did I do?	Identify the problem / issue
2	Inform - what does this mean?	Consider strategies and similarities to other situations and strategies
3	Confront - how did I come to be this way?	Consider possible solutions. Anticipate possible consequences of the solutions
4	Reconstruct - how could I do this differently?	Evaluate the strategy, are the possible consequences desirable?

Creating self-reflection for clients

Effective coaches support client's to learn and grow by inviting them to purposefully reflect. The ICF recommends three practical ways to create more reflection for clients: continual check-ins, scale questions and distinguishing evidence.

1. Continually 'check in'

Create a pre-coaching for form clients that includes questions like:

- What do I want to accomplish, change or challenge through coaching?
- What is getting in my way?
- Where do I want to begin?
- When my coaching is complete, how will I know it's been a success?

Midway through the coaching, use this intake form to reflect on where the client was, versus where the client is now. Allow the client to reflect on their progress and to change

2. Use scale questions

Scale questions ask for a rating, usually on a scale of one to ten. For example, 'on a scale of 1-10, how satisfied are you with the number of bookings you're receiving?' Scale questions create clarity for clients as each number has a different meaning. Your client can reflect on the rating, which leads to learnings around what works and what doesn't.

- If your client answers '6', ask what would be needed to make it an 8.
- If your client answers '5' ask them to reflect more on what they really feel, is it leaning towards a 4 or a 6. Why?

3. Distinguish Evidence

Similar to the coaching tool on unlocking limiting beliefs, getting clients to distinguish between beliefs that are rooted in evidence and those that aren't, challenges them to see things clearly.

Ask clients to reflect on their experience, and then ask 'How true is that?' This increases the opportunities for insight and personal learning.

Tips to make your coaching sessions more reflective:

- Check in with genuine curiosity on your client's progress
- Allow clients time to think, make connections and discover insights
- Ask at the end, "where are you now with this, from when we started the session?"

Creating self-reflection for yourself as a coach

When it comes to your personal learning as a coach, the same self-reflection tools and practices can be used. These will help you make internal adjustments and fine tune your practice to become even more impactful as a leader and coach.

You may like to reflect on these different areas to your coaching:

1. You as a coach
2. Your client
3. Your relationship
4. The interventions you have used
5. The system and environment in which your client is operating

Below are some useful questions to spark reflection on your coaching practice:

Area	Reflective questions
Relationship building	How well do I explain my coaching process? How well do I actively listen to others? How well can I remain neutral and non-judgemental with clients? What topics or behaviours trigger me to want to voice judgement?

Area	Reflective questions
Professional Development	What have I done recently that has improved my coaching effectiveness? What are my blind spots? What topics can I learn more about to better serve my clients? How do I manage my time? What positive impact does (activity) have on my coaching? Can I admit when I am wrong, or don't know an answer?
Client specific	When I think about this client, what feelings do I get? Am I reminded of someone else? How does that influence my behaviour? How am I affected by the work with this individual? What might be aiding or preventing me working effectively with them? What assumptions am I making about this client? How do we interact? How does this relationship compare to other coaching relationships I have?

Personal Mastery

Personal mastery is a journey of self-reflection and evolution.

PM can be thought of a move **away from** and **towards**

1. From caring about how we appear to others to our self-esteem being grounded in own inner substance of self and character

2. From thinking we have the answers (or needing to look like it), to being open to learning and accepting we have much to learn

3. From unconscious ego-based drivers dictating our behaviour to awareness of these, and speaking and acting more intentionally

4. From covering up mistakes and vulnerabilities to embracing them while remaining self confident

5. From being affected by what others say and do to knowing who we are and what we believe, while still listening to and taking value from other's views

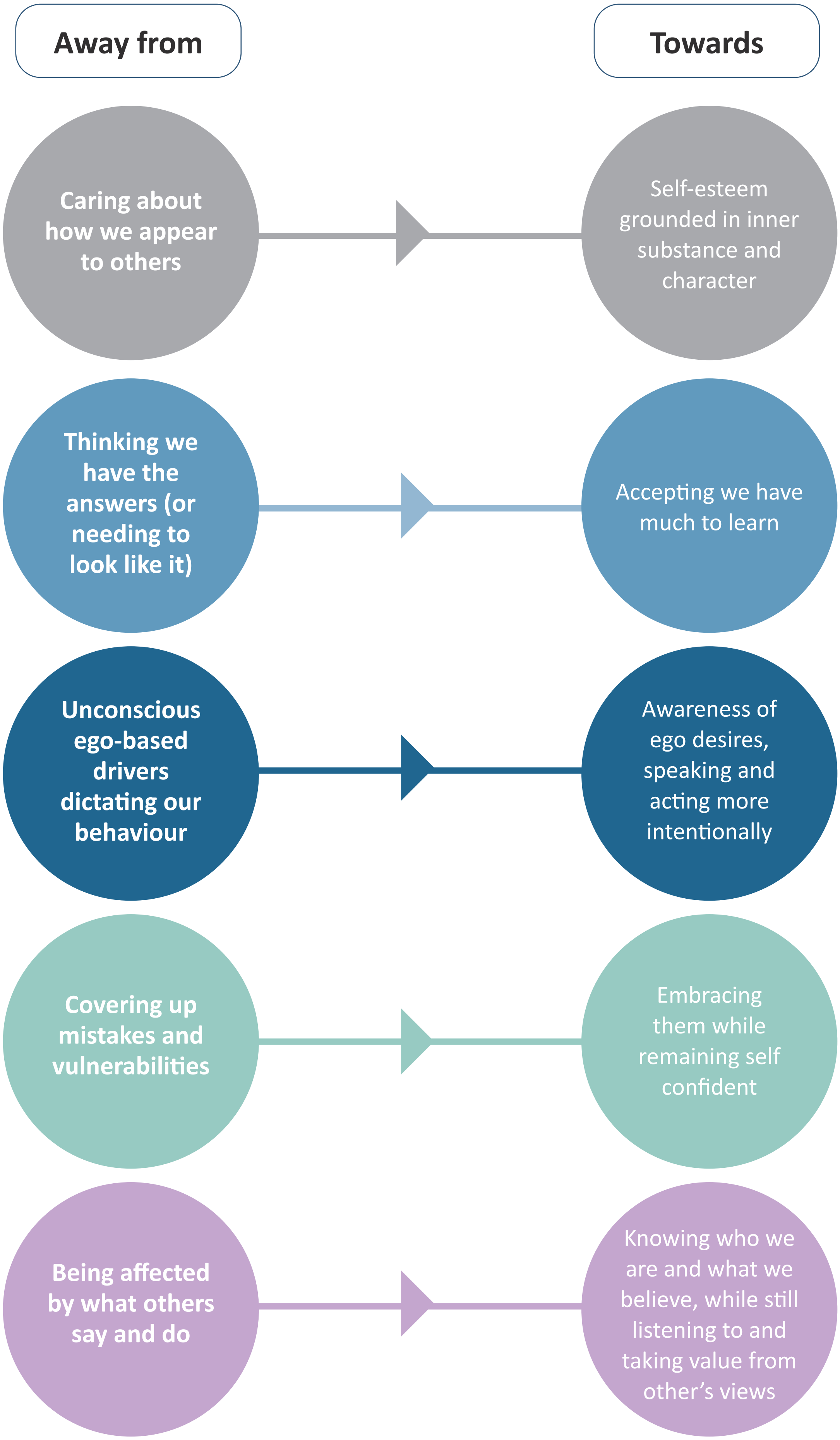


Diagram S11-3: The journey of personal mastery

Values

Values are the things that are important to us in life. They are deeply personal to each individual. Values are the principles, qualities and standards that guide us. Since values define what our priorities are in life, they directly influence our effectiveness and impact as a person - professionally and personally.

Examples of values include: creativity, tolerance, simplicity and honesty.

You may not immediately know what your values are, often it is not something we stop to consider in day to day life. But whether you are aware of them or not, your values drive your actions and purpose. They manifest in the way you live your life: in your thoughts, decisions, words and behaviour.

Why are values important?

The role of a coach is to positively impact your client. To leave them, and their business, in a better place as a result of the coaching intervention. When values are aligned with actions and words, there is a greater chance of you delivering this positive impact and adding value to your client, and your client delivering a positive impact to their business.

Consider the following examples:

1. Person A values authenticity, but works in a job where they do not feel they can be themselves.

2. Person B values independence, but is micromanaged by their boss.

3. Person C values collaboration, but works as a solo entrepreneur, spending long days alone.

In each situation, the person's value is not aligned with the work they are doing. This can have many undesirable impacts, including lack of motivation, negative outlook and loss of productivity.

As a coach, you need to be aware of values for two reasons:

1. To be aware of your own values, and reflect on how they may influence (positively or negatively) your work as a coach

2. To help clients develop awareness of their values, and make decisions in line with them

Bear in mind that values are not fixed or permanent. Values:

- Evolve and change over time
- Can be situational - what is true at work may be different to what is true at home
- Show us areas lacking in alignment in work/personal life

Understanding values

Values are deeply personal and unique to each individual. To understand your values, you must practice self-reflection. Below is a list of common values. Consider this list and select the five to ten values that you consider to be most important. Reflect on these. For each value ask:

- Why does it matter to me?
- How does it manifest in my life?
- Are there any areas (personal or professional) where I am not living this value?
- What steps can I take to align my actions and goals more closely with my value?

Note, this list is only a sample of values, there are many more. You may find other words that sum up your values better, feel free to use them. What is important is that you identify the values that are most personal and alive for you.

Values list:

Accomplishment
Accuracy
Acknowledgement
Adventure
Ambition
Authenticity
Calm
Challenge
Collaboration
Common Sense
Community
Compassion
Confidence
Connectedness
Contribution
Cooperation
Courage
Creativity
Curiosity
Customer Service
Determination
Directness
Discovery
Efficiency
Empowerment
Excellence
Fairness
Flexibility
Focus
Freedom
Friendship
Fun
Generosity
Growth
Happiness
Harmony
Helpfulness
Honesty
Humour
Independence
Innovation
Integrity
Intuition
Joy
Kindness
Learning
Listening
Love
Loyalty
Obedience
Optimism
Participation
Passion
Patience
Productivity
Profit
Recognition
Respect
Risk-taking
Safety
Security
Self-Esteem
Self-Expression
Self-Respect
Service
Simplicity
Spirituality
Sustainability
Teamwork
Tolerance
Tradition
Trust
Understanding
Wealth
Work-life Balance

As a coach, it is important to understand your core values. Living in alignment with them will feel more fulfilling and make you more effective as a coach.

You may like to take your clients through a similar values exercise so they can identify what is important to them. By making changes in their business (or personal life) to align closer with their values, they may experience greater satisfaction and success. See the Toolkit for an extensive list of values.

Modes of Learning

Learning occurs in different ways. Some people will prefer to listen and take notes, others to be actively engaged in a discussion, or to watch a demonstration.

As a coach, pay attention to the ways in which your clients seem to learn best, and tailor your coaching practices to suit these needs.

The following table describes common modes of learning and their benefits.

Mode of learning	Style	Description	Benefits
Independent	Learn individually	Learning is self-regulated and self-motivated.	Flexible, self-paced and develops resourcefulness.
Discussion	Learn through talking	Can take place in groups or one on one. Typically is planned around topics and probing questions.	Develops critical thinking, reasoning, resilience and creativity
Collaboration	Learn with others	Collaboration requires working together on a common task, project or goal. Participants should have equal contribution and accountability.	Develops accountability, problem solving and communication skills.
Feedback and reflection	Learn about learning	Feedback should be planned, specific and used as an opportunity to develop goals.	Develops self-awareness and visibility of previously unknown blind spots
Explicit	Learn from an expert	Learning is direct with clear goals and intentions. Usually takes place in short sessions with a central focus point.	Quickly and clearly learn

Mode of learning	Style	Description	Benefits
Guided	Learn with an expert	Learn alongside an expert who assists, guides and leads practice sessions.	More independent than explicit learning.
Demonstration	Presently learning	Learning is shown through presentation or demonstration. The demonstration becomes an opportunity to receive feedback.	Practicing what is learnt improves understanding, skills and confidence.
Experiential	Make, investigate, explore	Acquire learning in a practical context, in a virtual or physical manner.	Develops critical and creative thinking and problem solving skills.

Developed from:
www.education.NSW.gov.au/teaching-and-learning/school-learning-environments-and-change/future-focused-learning-and-teaching/learning-modes

The Learning Needs of Your Client

Business owners and entrepreneurs often don't understand what their learning and growth needs are. This is especially true if they work independently or as part of a small organisation where they lack access to structured learning resources. As a coach, you can help them fill this gap and make learning a central part of their approach.

Encouraging your clients to engage with continued learning will help them develop as leaders and business professionals.

Use dialogue, observation and analysis to identify your client's learning and growth needs. Once identified, these needs can be factored into the action plan you develop for them. If your client needs to learn to use Excel to improve their financial management, this would be an important goal to set for them.

Remember to break larger goals down into achievable targets that are SMART - that includes Achievable and Realistic.

Refer to the Coach Toolkit for information on conducting a Training Needs Analysis.

Section 12

Advancing as a Coach

Introduction

As a business coach you will come across situations and clients that challenge you. Often this appears as resistance in the coaching relationship. Learning how to handle these situations is part of advancing your practice.

Encountering resistance when going through periods of change is common - it occurs in the everyday business world as well as in coaching relationships. At times, you may feel a level of resistance in your coach-client relationship. Your client may push back against their action plan, or become defensive when asked about progress.

Your client may also encounter resistance from their employees, customers or stakeholders.

This section covers advanced strategies for improving your coaching practice. This includes overcoming common forms of resistance such as miscommunication, conflict and defensiveness, and unlocking limiting beliefs. These strategies are effective both for you to use, and for you to teach your clients.

Advancing as a coach also means getting better at what you do. This section covers the important skill of self-evaluation.

Miscommunication

Sri Lanka has a rich and diverse culture. This means that as a coach you will encounter different cultural norms. As well as language challenges, miscommunications arise from cultural differences, age differences and sometimes personalities that simply don't fit together

Cause of miscommunication	Possible solutions
Body language / gestures	Observe how others behave, be careful not to offend
Humour	Limit jokes and be conscious of cultural differences. What you find funny, your client may not
Generational differences	Be open with the client about how you see things and encourage them to do the same. Don't make assumptions.
Cultural	Be sensitive and aware. Research cultural differences and avoid unnecessary topics that could be inflammatory
Language	Double check important details and practice active listening, ensure that you and your client both understand. Where necessary, engage a translator or use translation apps. Provide written materials in your client's language
Personality clash	Practice your relationship building and communication skills. If together you and your client feel it is not possible to build trust and rapport in the coaching relationship, discuss whether it is right for you to continue the coaching.

Tips to avoid miscommunication

- Be aware of differences
- Don’t assume everyone is the same
- Observe how others behave before you act
- Double check things to make sure you and your client are on the same page
- During a conflict, pause and think hard about how to handle the situation

Conflict Management

Disagreement is an inevitable part of life. Human beings do not agree with each all the time. As a coach you will be talking to clients about sensitive issues and helping them to make potentially life changing decisions that impact their lives as well as their business.

Conflict may arise directly between you and your client. Your client may also be in a conflict situation with their employee, colleague, investor or other stakeholder.

Contrary to what many people assume, conflict can be a positive. If handled correctly, it can be an opportunity for learning and growth for your client, and for yourself as a coach.

Being able to handle conflict effectively is an important coaching skill. As a coach you are in a powerful position to show positive conflict management skills, and to identify, manage and diffuse conflict.

Sources of conflict

Common sources for conflict include:

- Misunderstanding, which could stem from a variety of sources, such as cultural, linguistic or generational
- Personality clash
- The client (or coach) is not in the right mindset to receive the feedback/information being given to them
- Confused messages or expectations

Responding to conflict

Communication is a powerful tool when responding to conflict. Your words can inflame or soothe a heated situation. Section 6: Communication Skills covers communication best practices in detail. Here is a recap of four valuable practices for responding to a conflict situation.

1. Body language

Remember that body language is a huge part of the way we communicate. Be open in your body language and also pay attention to the non-verbal signs your client is giving off. Being aware of their non-verbal communication will help you to diffuse potential conflict situations.

Body language to avoid includes pursing your lips, crossing your arms, rolling your eyes, clenching your jaw and physically turning away (a 'cold shoulder').

2. Active listening

Showing that you are willing to listen can often help alleviate conflict. Use active listening tools such as:

- Paraphrase the speaker's main points
- Try to identify the key points of the message to focus the discussion
- Encourage the speaker. Ask questions and show genuine interest in their answers
- Validate the speaker. It is not necessary to agree with their point of view to show interest and concern.

3. Use "I" statements

Using "I" statements can make a significant difference between the message being received as blaming (or accusatory) versus taking ownership. "I" statements put the speaker at the heart of the message. Compare the difference in these two sentences:

a) "You hurt the team when you don't do your work on time"
b) "I get frustrated when you don't do your work on time"

Option 'a' is likely to put the receiver in defensive mode. This makes open communication more difficult.

Option 'b' explains the impact of the receiver's actions. It is more likely to lead to constructive communication. A general structure for an "I" statement is: "When I hear you say... it makes me feel / think...".

4. Don't fall into a trap

Remember to avoid the common communication obstacles that obstruct effective communication. These include:

Lecturing: "How many times do I have to explain that..."
Threatening: "This is the last time I will..."
Preaching: "Someone in your position ought to know better than to..."

Help your client to manage conflict

During the coaching process, it is likely that your client will decide to make changes that affect those around them. This could be their employees, customers, suppliers, partners or shareholders.

Your client may experience pushback or resistance to change that could turn into a heated conversation or conflict situation.

Below are recommendations to help your client manage such situations. You may also find them useful in your coaching practice.

Before the conversation:

1. Understand why it is important to you - why do you need to have this conversation or raise this issue.

2. Put yourself in the other person's shoes, what are they looking to get out of the situation? What factors could be driving their actions / words?

3. Consider the elements of conflict from all sides.

During the conversation:

4. Be compassionate - start the conversation by saying “I need to tell you something that might be difficult to hear.”

5. Communicate clearly and professionally.

6. Confront behaviour, rather than your view of it. Focus on the evidence. Saying “You are not committed to making changes” is likely to make people feel defensive. Instead say, “When you don’t complete your part of the work on time, it makes me think you are not committed to making changes”.

7. Be curious. Try to approach the conversation with curiosity, to find out what lies behind the situation, rather than judging.

Managing conflict do’s and don’ts

Do	Don’t
✔ Go slowly	✖ Stop communicating
✔ Actively listen to what the person is trying to communicate	✖ Fall into common communication traps, such as lecturing
✔ Confront the situation, not the person	✖ Use insults or sarcasm
✔ Stay calm	✖ Assume you know what the issue is
✔ Use “I” statements	✖ Use blaming or accusatory language
✔ Take a break to allow people to clear their heads if the conversation gets too heated	✖ Allow your emotions to escalate the situation
✔ Focus on evidence and use examples	✖ Use aggressive or dismissive body language

Handling Non-engaged Clients

It is not uncommon for some coaching relationships to lose steam as the coaching progresses. Some clients will remain engaged, active and enthusiastic, but others may slowly start to engage less or become vague about their progress.

If this happens, try to identify the cause of the disconnect. Is it an issue with rapport between you and your client? Is it redirected frustration caused by something else in their life? Raise the issue with the client at your next meeting and find a way through it. Don't be afraid to ask directly, "Am I engaging with you in the way you want?"

Change your client's mindset

If you feel the source of the issue is your client's mindset, try the following techniques:

1. Prioritise questions that help your client change their perspective. Rather than asking 'what would happen if X', say 'what would happen if you don't make any changes'? Sometimes seeing things from a new view point is enough to spark engagement.

2. Remind your client of the larger visions of what they want to achieve. Reconnect them with the positive energy they associate with this success, and help them bring that positivity back to the present moment and immediate discussion at hand.

Make them accountable

Remember that accountability is a big part of the coaching relationship. This should be clear right from the start when you set the coaching agreement. If your client is not following through on what they said, or taking the agreed actions, you should raise this with them.

- Keep the targets, expectations and record keeping front and center. Clients who aren't doing the work tend to be vague with results. Having detailed records of numbers avoids this.

- Share the observation that you're not seeing the work being done in a calm and respectful manner. Give specific examples, and ask what the client wants to do about the situation. Do not jump in with suggestions, wait and let the client answer.

- If the client recommits to the process, be clear that you expect the results. Revisit the goals and lower expectations if necessary.

Handling Defensive Clients

Defensiveness is often a response to criticism, or perceived criticism. At the root of defensive behaviour, is a need to protect oneself from attacks from others, and a feeling of being unfairly blamed.

It is not unusual to feel defensive. It is a natural emotion, but defensiveness is also a block that prevents people from taking onboard criticism in a positive way. A cycle of defense and criticism can turn into stonewalling and contempt, leading to a breakdown in communication, and ultimately the relationship.

What are the signs your client is being defensive?

Common signs of defensive behaviour include:

Sign	Description
Denial of responsibility	Instead of taking responsibility they blame others, the context, the circumstances etc.
Counter-complaining	Deflecting the focus to other topics or issues: “You didn’t finish your marketing plan” … “Well, you didn’t contact that supplier”.
Repeating	Reiterating the same point in different ways, rather than acknowledging and discussing the root of the issue.
“Yes...but”	These types of comments start with agreement and end in disagreement. The speaker acknowledges what is being said but then dismisses it as a concern.
Making excuses	There may be real reasons why something wasn’t possible, but by making excuses the focus shifts to defensive behaviour, rather than taking responsibility.
Minimising	Describing the situation in a way that minimises the problem.
Not genuinely apologising	Issuing an insincere ‘mea culpa’.
Non-verbal signs	Crossing arms, tension in the jaw, changing the speed of talking and change in tone are common signs to watch for.

How to handle a defensive client

Below are a number of strategies you can use to handle defensive behaviour in others:

1. **Stay calm** and avoid becoming frustrated.

2. **Start on a positive note.** Show appreciation for what the person has done, not just focus on what they haven't, or the problem.

3. **Avoid blaming language**. 'You'

4. **Turn your criticism into a request**. Criticisms are about the past, requests are about the future.

5. **Ask meaningful questions**, be sincerely curious about the response. Keep asking questions until you feel that you understand them. For example, "It seems like my comment upset you. Help me understand what you are feeling."

6. Once the person has become less defensive, try to **move towards a resolution.** "What would you like to see as the next steps?" "How can we move forward from here?"

Remember

Sometimes, it is possible for you to take all the right approaches and for the person you are talking with still to be defensive. Try not to take this personally. It may stem from deeper issues, not your approach.

Unlocking Limiting Beliefs

Limiting beliefs are opinions that hold us back from our potential. They are opinions about why we cannot do, or have, or achieve, what we desire. For example:

- “I’m not educated enough...”
- “I could never do...”
- “I can’t compete with…”
- “I’m not good at…”

Your client may have limiting beliefs about why they can’t expand their business, why they can’t be a better manager or why they will not be successful.

Help your client to identify and challenge their limiting beliefs using the below process. Remember, your client’s beliefs have often developed over years and will take time to change.

Step 1: Identify the limiting belief - what belief is at the root of this feeling? What barrier do you feel is stopping you? Limiting beliefs often exist as something deeper under the surface of the initial symptom or issue.

Step 2: Challenge it - ask, is this really true?

Step 3: Update your strategy - what practical steps can you take to overcome this belief? Example strategies might include taking a course or enlisting help from an expert.

The Situation: The client, Avanthi, would like to grow her small beauty salon business by offering lucrative treatments such as wedding day hair styling, but feels unable to.

Step 1: Identify the limiting belief:
“I am not a good salesperson, so people would not choose my salon for their big day.”

Step 2: Challenge it:
The coach asks her to question if this is really true, and to find examples of the opposite being true. Avanthi recalls several occasions when she was able to generate sales and promote her business including when she opened her salon and had to promote it to people personally, and last year when she launched a different type of restorative hair treatment that was well received.

Step 3: Update your strategy:
Asanthi implements a strategy to help her move forward towards her desired outcome. She will carefully plan her sales pitch in advance and practice it on friends and family. She will also create smart marketing materials for her new service.

Self-evaluating Your Coaching

As a coach you must engage in continuous self improvement in order to be of the best service to your clients.

A coach who regularly practices self improvement will build on their success, while a coach that doesn't practice self improvement will:

- Not improve
- Not understand why some things went well, and therefore won't be able to repeat that success
- Give the same service to all their clients, rather than tailoring to the individual

Each coach will have their own method that they find most effective to evaluate their performance. This typically includes reflection after each coaching session. Doing this regularly will help you to:

- Identify your strengths and weaknesses
- Identify areas for improvement
- Track and monitor your performance
- Plan your coaching sessions better
- Motivate yourself, as you see how you are improving over time

Consider the following questions for self-evaluation after a session:

1. How did the session go?
2. What worked well?
3. What could I do differently?
4. One thing I did really well during this session was…
5. One thing that I want to remember for next time is…
6. One tool / technique / approach that was particularly effective with this client was…

You can also select your top 5-10 coaching characteristics that you want to embody and rank your behaviour in the session against these from 1 - disagree, to 5 - strongly agree. For example:

I was well prepared for this session - 4
I used my body language well - 3

If you give yourself a rank of 3 or less, reflect on why that is and what you need to work on to improve.

The Coaching Activity Report in the Toolkit includes a space for self-evaluation. This form should be used after you finish a coaching session.

Aim for continuous improvement

Self-evaluation is a useful tool for continuous improvement. Once you identify an area that you think you could perform better in, you can put in place a strategy for improvement.

Continuous development is important for coaches. This will be discussed in more detail in Section 13: Developing Your Business Coaching Practice.

Section 13

Developing your Coaching Practice

Introduction

After you complete your initial training to become a business coach, the learning does not stop. As a coach, you will be expected to continually learn and develop yourself throughout your career, so you can improve your own skills, and give the best service to your clients.

Just like the business world continues to change and adapt, so too will your skills. In this section you will learn the principles of Continuing Professional Development, why it is important and how to make it a regular part of your professional life.

This section also gives you the tools you need to set yourself up as a professional business coach. It prompts you to think about your branding and the types of clients you want to serve and how you can market your coaching to this audience. As well as the strategies and principles of pricing, so you can select rates that work for you, and your clients.

Continuing Professional Development (CPD)

Continuing Professional Development is a journey without end. You practice it throughout your career as a business coach and leader.

What is continuing professional development?

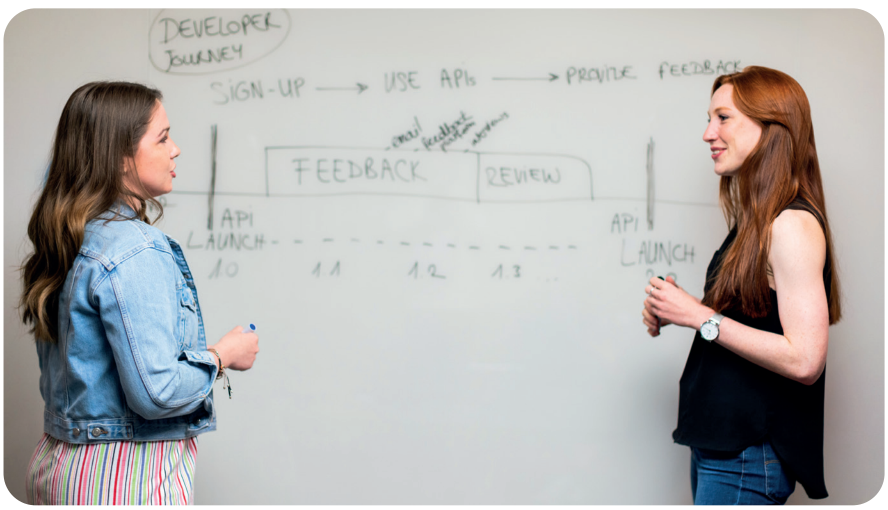
Continuing Professional Development (CPD) is used to describe a diverse range of methods that have the goal of improving performance, and by extension outcomes. CPD is essential to reaching a level of mastery.

Ongoing learning enables people to make the best decisions to ensure their success.

CPD may take place formally or informally, individually, or in a group environment. Examples include: workshops, formal training courses, observations, reading articles, books, blogs, listening to podcasts.

CPD should:

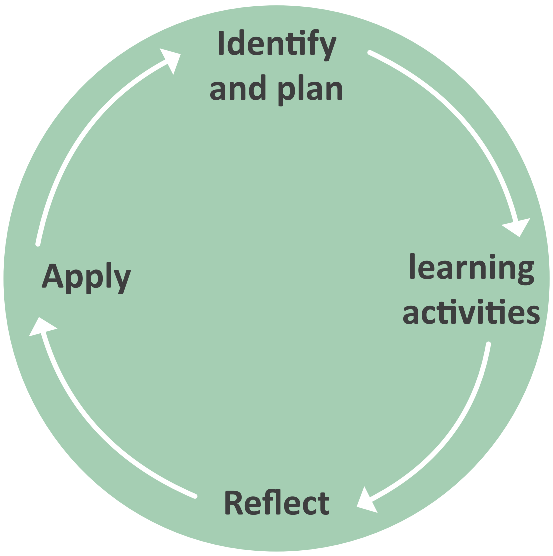
- Be self-motivated and self-directed
- Help you set development goals and objectives
- Include both formal and informal learning
- Be documented



Why is CPD important for business coaches?

By keeping up to date on the latest coaching techniques and increasing your knowledge base, you will be able to deliver a highly relevant and engaging level of coaching in a way that better serves your clients.

The CPD Cycle

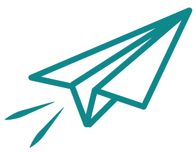


How to start CPD

A simple way to begin your CPD journey is to start a learning journal or log. Record your thoughts in any form that suits you best. This might be hand writing them, typing and emailing them, in detail or as bullet points.

Make notes on your learning experiences since you became a coach, or over the last year. Record outcomes and the difference it made to you, your clients or others around you.

Use this journal to reflect on each new learning experience.



Tips

After each coaching session, reflect on and record the following:

1. The situation
2. What you learned
3. What you will do differently in future

You can use the Coaching Activity Report as a template, or make your own notes.

The stages of CPD

Continuing Professional Development is personal. It is based on your individual needs and skills. Before you can move forward with CPD, you have to identify your needs.

1. Identify your needs

Conduct a skills audit, identify your strengths and weaknesses and ask for feedback. Getting feedback from others around you can provide a solid baseline for your professional development. Ask multiple people because each will mention things that they personally view as important. Notice where there are similarities in the feedback, and focus on those areas for improvement.

2. Plan and carry out learning activities

These are activities chosen to address the needs you have identified. They could be formal (e.g. taking a course) or informal (e.g. reading up on a subject you wish to know more about). CPD can be potentially expensive, but the internet offers many innovative and excellent ways to learn, access materials, and take online courses, even for free.

3. Reflect on your learning

Remember that learning comes from reflecting on your experience, not from the experience itself. Practice self reflection, see Section 11 Growth Mindset for more information. Consider what you learned, what you found useful about the activity, and what was not useful. Then consider how you can put this learning into action.

4. Apply your new learning

Knowing is one thing, but putting it into action is what counts. Practice is fundamental to improvement. You may find yourself feeling clumsy or awkward at first, perhaps you feel very conscious of talking in a different manner to clients, but as you improve over time your new skills will begin to feel natural.

Remember

Professional development takes time and effort. It may be helpful to think of it as a part time job, something you are always investing in and dedicating time to.

Build Your Brand

To effectively build your brand as a business coach you need to first be sure about a) who you are as a coach and b) what you do.

Having these basics of your professional identity clear in your mind will allow you to articulate your services and target the right kind of clients for your expertise.

Step 1: Identify who you are as a coach

Find your USP (unique selling proposition). Look at what problems you like solving and prior clients (or business achievements) you have excelled with to identify your niche. How does your experience, expertise and skills differentiate you from others?

Position yourself as an expert without losing your authenticity. Be prepared to share your story and what you have been through to become the leader you are today.

Early in your coaching career, this may mean you focus on assisting clients who have businesses in sectors you know well. As you gain skills and experience you may choose to continue this, or to diversify.

Step 2: Identify what you do as a coach

Identify who you help and what you help them with.

- What areas can you support your clients in?
- What areas can you not support clients in?

Be clear on the areas where you cannot help clients, and exclude these from your offerings accordingly. Don’t try to cover it all.

Step 3: Identify who your ideal coaching client is

Begin by identifying who you want your primary client group to be, by answering the following questions. You may also like to identify a secondary group that you would also like to help. These are not less important, just different. For example your primary group may be large hospitality businesses, while your secondary could be family run homestays who can’t afford your normal fees.

- What in your life has led you to become a business coach? How can this guide you to your client group?
- What is your ‘why’ (the deeply held reason) for coaching these clients?
- What expertise have you gained that is relatable for coaching them?
- Can you visualise your clients? Give them a name, face and a business. What qualities do they have?
- What problems are they struggling with?
- Imagine a success story of an ‘ideal client’ using your business coaching services. What situation were they in when they first came to you? How did you help them? What did they achieve as a result?

Once you have the above, create a targeted brand statement combining who your ideal client is and what you can do for them. Use this throughout your marketing to create a strong professional brand.

A brand statement is brief. It summarises what you do, why you do it, and what sets you apart from other business coaches. Make it attention grabbing and memorable. Think of it as your professional slogan. For example:

“I help business owners to grow their business, to improve their profitability and to allow them to regain their work-life balance.”

“I love working with Tourism Startups and Hospitality businesses looking to scale up. I’m a critical thinker and creative problem solver. I help my clients solve problems and seize opportunities.”

Step 4: Become visible

Set up social media profiles for your business coaching. Remember, this is about you as a professional, so keep holiday photos and personal content separate.

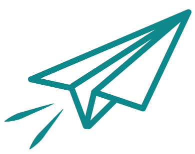
Increase your visibility by connecting with relevant people who have the potential to become clients. LinkedIn is a good place to publish insightful articles and facebook is very popular in Sri Lanka. Look also for sites and networks specific to the sector or area that you will be coaching in.

Step 5: Build your website

Your site should give people an idea of who you are, what you offer, why you offer it and who you help. To do this, ask yourself:

- Who is my target audience?
- What stage of their business are they currently at?
- What are their problems? What solutions do I offer?
- What is their motivation for working with a coach like me?
- What questions do they have, and how can I answer them?

A website doesn't need to be expensive. There are many providers that charge minimal fees to create and host a site. Research the different options and pick one with the functionality you need.



Tip

Make it easy for people to contact you. Make sure your website, LinkedIn and business cards give people your full and accurate contact details.

Step 6: Get organised

Gather the tools and software you need to run your business and successfully manage multiple coaching relationships. Get a strong calendar management and reminder systems in place. Have a system for tracking information on your clients. If you will receive payments online, set this up. Automate tasks where possible, this will give you more time to focus on adding value for your clients.

Step 7: Start pitching

Perfect your 'elevator pitch' - a succinct description of who you are and what you do that hooks people in. Network and connect with people who may be interested in your coaching services. Post about your services on social media and your blog (if applicable).

Set up a monthly email newsletter that shares testimonials and case study success stories (remember to obtain permission from clients before sharing). Consider other ways to generate a buzz about your services, such interviews or hosting a podcast. Collect and share testimonials to let success stories do the selling for you.

Remember

Authenticity and trust are at the core of the coaching relationship - be sure to build a brand that truly represents who you are and what you do.

Market Your Business

Once you have created your brand identity, the next step to getting clients is to market your business coaching services.

There are many ways to do this. What is right for you will depend on the clients you are looking to attract.

Consider the following options:

Online marketing	Offline marketing
LinkedIn	Word of mouth
Facebook	Networking at events, conferences and with people you know
Twitter, Instagram and other social media sites	Advertising in print publications, radio, TV
Post YouTube videos with helpful content	Become a guest speaker, panel member or interviewee at relevant industry events
Write a blog	Contact companies and individuals directly to offer your services
Become a guest writer for other websites. This helps build your brand and drive visitors to your website	Be interviewed on a popular podcast, or create your own
Create an email newsletter	

Organic marketing

Organic marketing refers to growing your business naturally, rather than with paid-for measures. In the digital space, this means clients coming to your website / social media pages naturally, as opposed to 'artificially' through clicking on paid links or adverts.

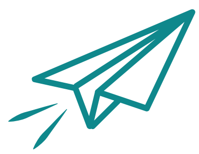
By using organic social media marketing, you can build a community of loyal followers and clients who value your inspiring and relevant content. It gives you and your potential clients the opportunity to learn about each other. This type of online community often leads to stronger sales conversion rates and brand / product loyalty.

Organic marketing activities include:

- SEO (Search engine optimisation) - this helps people find your website on search engines
- Content marketing - providing relevant, timely content for your audience
- On social media:
    - Answering questions from followers
    - Replying to feedback and comments
    - Joining (or creating) groups on facebook
    - Providing unique, well-written, articles / tweets, with pictures and/or video

Organic marketing mostly takes time, not money. Unlike paid advert on facebook, it will not give immediate results but over time, it is a very effective way to reach clients and create brand awareness.

Marketing tips:



1. Be consistent in your voice and branding. Offering one service on LInkedIn and another on your website is confusing, and may put potential clients off.

2. Create a business card design that reflects your brand (e.g. as a coach, are you lively and inspiring, or serious and efficient?) Always keep business cards with you - you never know when you may meet a potential client.

3. A professional looking website is time and money well spent. Make sure it works well on both mobile and desktop. If you are multilingual, create a website that is too.

Pricing Models

The amount to charge as a business coach can feel like a sensitive subject. Unlike service roles where the same set fee is charged, coaching prices can vary based upon the experience of the coach and the type of client.

If you charge too much it may be difficult to get clients. If you charge too little you may have to take on too many clients to earn your target amount. Typically speaking, large businesses or organisations will be able to pay more for coaching than individuals or startups. It makes sense that if you're coaching the CEO of a Sri Lankan conglomerate, it's appropriate for you to charge more than if you are coaching the Manager of a small local non-profit.

In coaching, it is more common to price based on the value you provide, than for the time taken. Consider the following example:

You want to learn to play the guitar and see two adverts for a teacher:

A: Guitar lessons for beginners - $20 per hour
B: Guitar beginner series - play your favourite song in just one month! $150

Both options include one lesson per week. Option B is more expensive, but it includes a specific outcome - to play your favourite song. Which would you choose?

In coaching, clients want to find solutions to specific problems they have, that's why many coaches prefer to set up ongoing arrangements with their clients. These typically come with higher rates, and the benefits include a more results-focussed approach (as opposed to time-focussed) and deeper coach-client relationships.

Common pricing approaches:

Hourly paid
Charge a set amount per hour that you spend with your client. This can be a good way to begin and gain coaching experience, and to introduce new clients to the process and benefits of business coaching.

One downside of hourly billing is that it puts the focus on your time (60 minutes), rather than results achieved.

Retainer
Charge a flat amount per month, every month, for access to your services. You and your client can agree what services this includes. In addition to your main coaching sessions, you should consider how available you can be to your client (can they call you? Text you? Which hours will you be available to respond? How many emails will you answer?).

The benefits of retainer charging include predictability of income, but if you don't set expectations properly, the clients may take up a lot of your time.

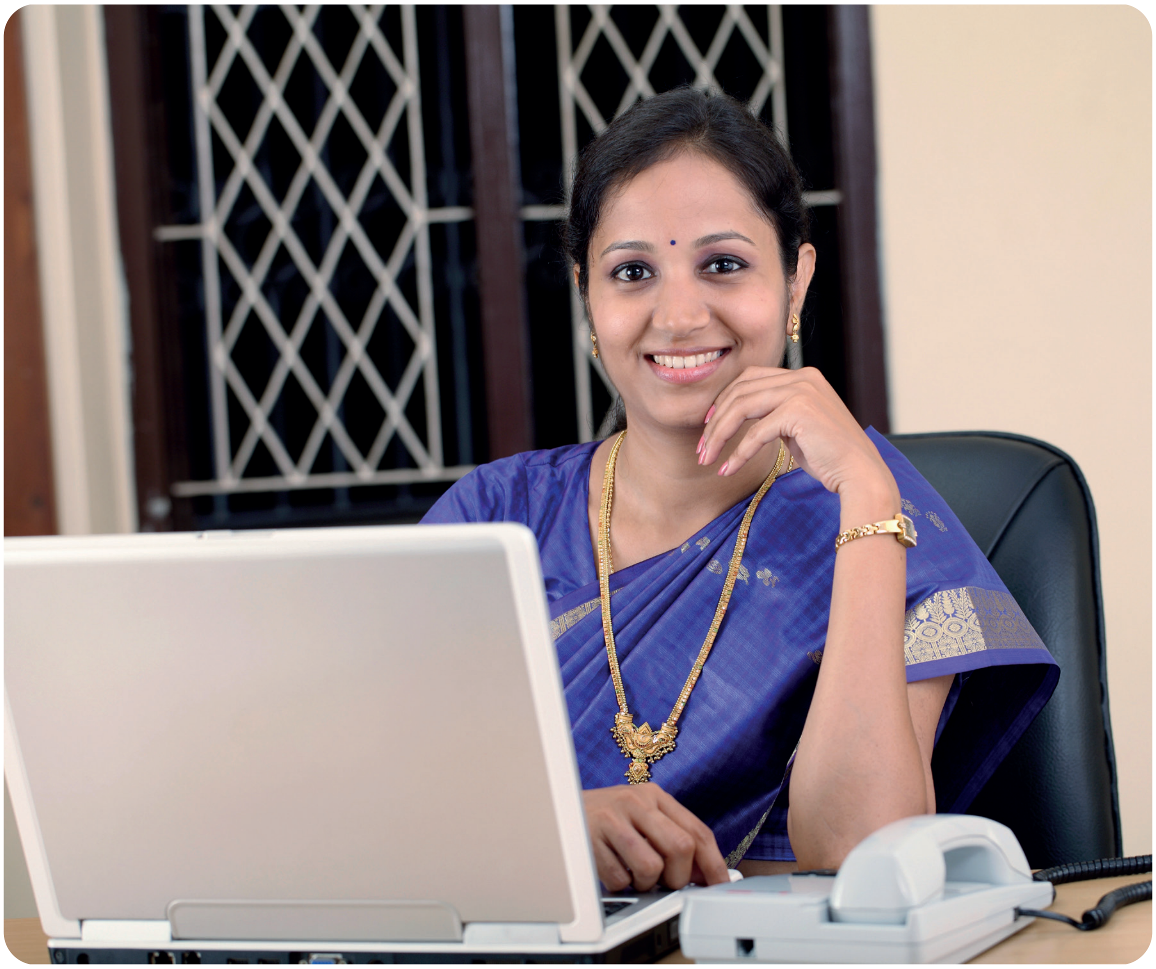
Package
Charge based on a package, for example a six month coaching program including 6 sessions and other agreed support services. Packages have the advantage that your client is committing to coaching over a longer period or time, this means they are likely more motivated. In addition, you can anchor your clients expectations to the results they want to achieve.

When setting up a longer term package, you can offer an installment plan. For example, charge 50% upfront, followed by five installments of 10%. Or 50% upfront followed by 50% at the three month stage.

Your services as products
Once you have developed coaching expertise, you can consider selling your services as a product. Focus on your popular offerings, or areas where you frequently see clients needing assistance. These can be offered for a fixed rate in a standard format. For example: a half day session focussed on branding and eMarketing, or a full day session on product development for guest houses.

Pricing structure	Example
Hourly Paid	Rs x per hour (60 minutes)
Retainer	Rs xx per month (inclusive of 2 coaching calls, unlimited emails/texts)
Package	Rs xxx for a package of 6 months coaching, including 10 coaching calls, 2 in person meetings, weekly check-in emails and 3 recorded interviews with inspirational business leaders

Case Study



Harini has a background in hotel management. She worked in 4 and 5 star hotels in the Maldives and Sri Lanka before training to be a business coach.

As a newly qualified coach, Harini used social media, her network and word of mouth to get her first clients. She wanted to work with clients who had small to medium sized accommodation businesses, where she felt her industry experience would be valuable. She gave a 30 minute online coaching session away for free, and saw positive results with people signing up for paid coaching sessions afterwards. At first, she charged a fixed rate per hour. But after a few sessions, or if a client had a particularly complex problem, she suggested they move to a package where she could provide coaching over 3, 6 or 12 months.

Now, several years later, most of her income is from clients who pay for a special 12 week program she designed for accommodation owners that covers all their major business areas. She also sells a 'brand your business' pack as a special fixed-price product, showing owners how to successfully market their hotels to foreign guests.

Setting a price

This art of pricing for business coaching is not scientific, it is down to your personal approach. As you gain experience, it will become easier for you to decide how much to charge. The below steps will guide you on how to start pricing for your coaching services.

1. Establish your minimum rate.

a. Calculate your **costs** (C). What is the amount you need to earn in order to pay your rent, bills, taxes etc. Calculate monthly, then multiple x 12 for annual.

b. Work out your billable **hours** (H). A typical working week is 40 hours, but as a business coach, like many freelance professions, you need to spend time on things that are not billable hours, such as marketing and searching for new clients. Calculate weekly, then multiply x 50 for annual (factoring two weeks holiday per year).

c. Divide annual costs (C) by annual billable hours (H). This is your minimum rate per hour.

2. Factor in your time. If you are charging for a package, how much time do you expect to spend with the client outside of main coaching sessions, how much will you be available to answer emails, take phone calls, provide additional support? Will you need to travel to meet the client? Will you need to hire a meeting space?

3. Consider non-financial benefits. Is this a client that you really want to work with? Could they give you powerful recommendations? Do you need to build your client base quickly? If yes, you may want to agree to a lower rate because of the other benefits this client brings.

4. Decide on your profit margin. You already know your minimum rate (step 1), but how much on top of this do you want to charge? As well as your answers to steps 2 and 3, factor in your experience level and the expected value you can create for this potential client. As business coaching becomes more widespread in Sri Lanka, you can also research what other coaches are charging.

Tip

When starting out as a coach, you may like to give clients a sample of your services. This can be particularly valuable in the Sri Lankan market where business coaching is still a new service.

Rather than telling clients what you do as a coach, consider offering them a free call where you will coach them for 30 minutes. After this experience they should have a pretty good idea of your coaching style and you can either part ways, or progress to discuss possible coaching services.

Understand your value

There are many ways to price and package business coaching. At the end of the day, it comes down to what the client is willing to pay. The more value you bring as a coach, the more valuable your clients are likely to find the experience of coaching.

Follow the below tips when setting your prices:

- **Understand the value** you provide through your clients eyes. Then package your services accordingly.

- As you master your role of coach and become better at what you do, you will be able to **provide more value in less time**. Your ability to do it in 60 minutes doesn't mean you should only charge for 60 minutes of your time.

- **Remove ambiguity** in your offerings and pricing to make it easier for your clients to decide to work with you.

- Put a process in place to understand your potential clients' **pricing sensitivity.**
  - Research them, look at what they do/sell. Are they a guesthouse offering rooms for Rs 4,000 a night or a luxury hotel charging USD 200?
  - Give a range. Consider saying "In similar situations in the past, clients like you have made an investment (in your coaching) between X and Y". Pay attention to their reactions and then tailor your proposal/pricing accordingly.

- Remember that charging more to clients who can afford it, means you have more time to work with clients you want at price points they can afford.

Coach Handbook

References

Topic	Reference
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Case study from Skills for Inclusive Growth	https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Skills-that-matters-lifechanging-Life-changing-experiences-.pdf
Section 2: Basics of Business Coaching	
Coaching mindset	https://www.inc.com/lee-colan/the-power-of-a-positive-coaching-mindset.html
Ethics	*Brennan, D. and Wildflower, L. (2014) 'Ethics in coaching', in E. Cox, T. Bachkirova and D. Clutterbuck (eds), The Complete Handbook of Coaching, 2nd edn. London: Sage Publishing, pp. 430–44*
IAC ethical principles	https://certifiedcoach.org/about/ethics
Section 4: Managing Change	
Change model - Scott & Jaffe	https://expertprogrammanagement.com/2018/05/scott-and-jaffe-change-model/
Resistance - Kotter & Schlesinger : 4 types, and 6 change approaches	https://expertprogrammanagement.com/2018/05/six-change-approaches/
Module 5: Diversity and Inclusion	
Statistics	World Bank https://www.worldbank.org/en/topic/disability
Statistics	World Report on Disability, WHO, 2011 https://www.who.int/disabilities/world_report/2011/report.pdf
Statistics	Disability in Sri Lanka, Department of Census and Statistics (2012) https://unstats.un.org/unsd/demographic-social/meetings/2016/bangkok--disability-measurement-and-statistics/Session-6/Sri%20Lanka.pdf

Statistics	Ministry of Social Welfare, National Policy on Disability for Sri Lanka, 2003 http://67.199.83.28/doc/-NatPolicyDisabilitySep2003srilanka1.pdf
Statistics	Sri Lanka Labour Force Survey, Annual Report 2019, http://www.statistics.gov.lk/Resource/en/LabourForce/Annual_Reports/LFS2019.pdf
Barriers	Ministry Of Social Welfare, National Policy On Disability For Sri Lanka, http://67.199.83.28/doc/-NatPolicyDisabilitySep2003srilanka1.pdf
Barriers	Women and PWD Economic Empowerment Study, Skills for Inclusive Growth, https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Women-and-PWD-Economic-Empowerment-Study-Final-Report.pdf
Models of disability	How We Talk About Disability Matters, DARU, http://www.daru.org.au/wp/wp-content/uploads/2019/03/Human-rights-info-sheet-for-website.pdf
The business case	Working With Diversity in Coaching, Sunny Stout-Rostron https://www.researchgate.net/publication/316595159_Working_with_Diversity_in_Coaching
The business case	Gender factsheet By Yara van Heugten, https://prezi.com/view/9x3lnnT1KBhqV7x4vjyl/
The business case	Accenture, Getting to Equal: The Disability Inclusion Advantage, https://www.accenture.com/t20181029T185446Z__w__/us-en/_acnmedia/PDF-89/Accenture-Disability-Inclusion-Research-Report.pdf
Resistance	VicHealth (En)countering resistance https://www.vichealth.vic.gov.au/-/media/ResourceCentre/PublicationsandResources/PVAW/Encountering-Resistance-Gender-Equality.pdf

Topic	Reference
Section 7: Building Successful Relationships	
Dr Brené Brown's four stages of empathy	https://twentyonetoys.com/blogs/teaching-empathy/brene-brown-empathy-vs-sympathy
ICF definition of a coaching contract	https://coachfederation.org/blog/boundaries-in-coaching
Coaching contract sample	https://coachingfederation.org/app/uploads/2017/11/SampleCoachingAgreement.pdf
Coaching contract advice	http://www.wabccoaches.com/white_papers/20150129/WABC-White-Paper-Contracting-within-the-Business-Coaching-Relationship--a-Guide-and-a-Cautionary-Tale-Jan-2015.pdf
ICF article on boundaries	www.coachfederation.org/blog/boundaries-in-coaching
Christine Kane quote about boundaries	https://christinekane.com/setting-boundaries-with-demanding-clients/
Section 11: Growth Mindset	
McKinsey & Company 2017 study	https://www.mckinsey.com/~/media/mckinsey/industries/public%20and%20social%20sector/our%20insights/drivers%20of%20student%20performance%20asia%20insights%20revised/drivers-of-student-performance-insights-from-asia.pdf
Personality tests	www.16personalities.com https://profile.keirsey.com/#/b2c/assessment/start www.discpersonalitytesting.com/free-disc-test
Modes of learning	https://www.education.nsw.gov.au/teaching-and-learning/school-learning-environments-and-change/future-focused-learning-and-teaching/learning-modes

International Coaching Associations

International Coaching Federation (ICF)
https://coachingfederation.org

Association for Coaching (AFC)
https://www.associationforcoaching.com

European Mentoring & Coaching Council (EMCC)
https://www.emccglobal.org

Worldwide Association of Business Coaches (WABC)
https://wabccoaches.com

International Association of Coaching (IAC)
https://certifiedcoach.org/

Skills for Inclusive Growth (S4IG) reports

One Step at a Time, Creating Systemic Change	https://inclusivegrowth.com.lk/wp-content/uploads/2020/02/One-Step-At-a-Time-Report.pdf
Skills that Matter! Life Changing Experiences	https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Skills-that-matters-lifechanging-Life-changing-experiences-.pdf
Women and Persons With Disabilities Economic Empowerment Study, January 2020	https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Women-and-PWD-Economic-Empowerment-Study-Final-Report.pdf
Leading The Way In Skills Development	https://inclusivegrowth.com.lk/wp-content/uploads/2020/06/Leading-the-way-in-Skills-Development.pdf
Business Coaching Manual for Beauty Salons	https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Business-Coaching-Manual-for-Beauty-Salons-.pdf
Disability Toolkit: Reasonable Adjustments In NVQ Assessment for Candidates with Disabilities	https://inclusivegrowth.com.lk/wp-content/uploads/2021/01/ToolKit_English-Full-Book.pdf
Outcome Harvest of Business Coaching Model	https://inclusivegrowth.com.lk/wp-content/uploads/2020/08/Business-Coaching-Model.pdf

Extra reading

Business models and education
https://expertprogrammanagement.com/

Business Model Canvas
https://www.strategyzer.com/canvas/business-model-canvas

Question Types
https://www.thecoachingtoolscompany.com/products/wrap-up-session-questions/