



## Professional Coaching

Professional Development Center

### Professional Coaching Certificate

CE hours 6

#### About the Coaching Catalog

Coaching is a critical skill for Advisors. This course provides knowledge and practical advice to help Advisors to develop the perspectives and skills necessary to be an effective coach. The following learning modules include how coaches can use the **GROW** model as a coach and the **Skill / Will matrix** to help determine coaching style. In this course, you will also learn about the five phases of the **coaching cycle** and how important **trust and respect** are to building a strong relationship with the client. Once you successfully complete all elements of the course, you will be awarded the certification.

**Target Audience:** Any person in a role that leads and influences another's performance, desiring to further hone their coaching skills to bring out the full potential in others

#### Individual Course Certificates

1. Beginning Your Coaching Engagement | CE Hrs 1.0
2. Business Coaching: Getting Ready to Coach | CE Hrs 1.0
3. Business Coaching: Using Different Coaching Styles | CE Hrs 1.0
4. Coaching Techniques that Drive Change | CE Hrs 0.5
5. Coaching to Drive Performance | CE Hrs .5
6. Business Coaching: Building the Coaching Relationship | CE Hrs 1.0
7. Business Coaching: Conducting Coaching Sessions | CE Hrs 1.0

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### Coaching Course Module Descriptions

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## 1) Beginning Your Coaching Engagement

### Course Summary

The coaching relationship is different from many other working relationships you may have encountered in your career. A coach has a special position that isn't as prescriptive as a manager or as instructive as a mentor; a coach is focused on guiding the individual being coached through their own process of discovery and growth. There are five phases of coaching, and this course will cover the first three: enrollment, discovery, and developing the action plan. In these stages, the coaching relationship and its goals are created, setting the stage for the remainder of the coaching engagement.

### Objectives

#### Taking the First Steps with Your Coachee

- assess a candidate's suitability for coaching
- ask assessment questions that will help develop coaching goals
- select empowering personal advice guidelines (EPAs)
- guide the coachee in the creation of their personal strategic action plan (SAP)
- coach a client through the beginning stages of a coaching engagement

## 2) Business Coaching: Getting Ready to Coach

### Course Summary

Coaching offers organizations a win-win method for developing their employees. It not only helps individuals reach their potential but also helps the organization improve its productivity and competitiveness. In a rapidly changing business world, coaching can also help employees adjust and adapt their skill sets. Coaching is about encouraging, confronting, challenging, questioning, as well as consistently respecting and supporting coachees in developing and achieving their goals.

This course introduces the skills you need to be an effective coach, including listening and observing, providing feedback, questioning, and setting goals. It also covers how to identify which coaching role is most appropriate for a given individual or situation. The course also details the importance of selling the idea of coaching to those you feel need it. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

### Objectives

#### Getting Ready to Coach

- recognize examples of actions that demonstrate skills a coach needs to be successful
- recognize which coaching role is most appropriate for a given individual
- recognize how to effectively explain the need for coaching

- respond appropriately when faced with a particular pros
- pect mindset

### **3) Business Coaching: Using Different Coaching Styles**

#### **Course Summary**

Every coachee has different needs, and an effective coach can identify those needs and tailor a coaching style to maximize results. Coaches typically use two general coaching styles – directive and nondirective – depending on their coachee's skill and motivation, as well as how far along they are in the coaching relationship.

This course highlights the importance of using an appropriate coaching style with your coachee. Specifically, you will learn how to use different techniques for directive and nondirective coaching. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.

#### **Objectives**

##### **Using an Appropriate Coaching Style**

- recognize how to use directive coaching techniques
- build a coachee's will in a given scenario
- recognize how to use non directive coaching techniques

### **4) Coaching Techniques that Drive Change**

#### **Course Summary**

Coaching by definition is action-centered. This is the main thing that differentiates it from counseling. At this point in the coaching engagement, the coach and coachee will have agreed on and co-created the Strategic Action Plan, which defines the goals and activities that the coachee will be working on throughout the remainder of the experience. Techniques covered in this course will give the learner the tools needed to lead from behind as a coach. Leading from behind is providing guidance through skillful observation and communication techniques that help guide the coachee's discoveries, self-awareness, epiphanies, and 'aha' moments. Keeping the momentum of progress, staying the course, and creating detours characterize the coach's work in this phase. These are accomplished through coaching tactics that include questioning, listening, observing, and challenging.

#### **Objectives**

##### **Getting to the Heart of Matters**

- select power questions to get at the heart of a coaching conversation
- identify the elements of effective listening in coaching sessions

- set expectations for a coaching observation with a coachee
- use challenging as a technique to expand what a coachee thinks is possible
- conduct effective coaching sessions using questioning, listening, observation, and challenging

## 5) Coaching to Drive Performance

The proven fact is that desired results are achieved more quickly with the guidance of a personal Coach. When a coach is working to drive performance, the coachee is being held accountable to do what they say they are going to do, and want to do. This phase of a coaching engagement is called the 'accountability phase' in coaching. It is also the phase when the 'shoulds and ought-tos' bubble to the surface - the things that a Coachee is unconsciously following, instead of their true aspirations. These 'shoulds and ought-tos' come from outside the coachee, and it is in this phase that they must be dealt with, by either eliminating them or figuring out a way to deal with them. Towards the end of this phase, the coachee is clicking along and it's time to 'fire' their coach. The coach is no longer needed as the goals of the engagement are creating the coachee's desired outcome. The coach must be able to spot the pending conclusion of the engagement and set the coachee up for sustainability of performance using coaching tactics.

### Objectives

- ask questions to guide a coachee in the assessment of their progress
- guide the coachee back on track when they run into excuses and procrastination
- recognize the signs that it's time to conclude the coaching engagement
- assist the coachee in assessing progress toward their goals and sustaining improved performance, and conclude the coaching engagement
- sequence examples of the steps in the sales process
- determine whether the steps in developing a sales strategy have been carried out correctly

## 6) Business Coaching: Building the Coaching Relationship

### Course Summary

Establishing a positive and respectful coaching relationship is integral to the success of your coaching efforts. It lays the groundwork for accomplishing the goals you and your coachee set.

This course highlights the importance of a strong coaching relationship. It describes how to establish rapport with your coachee by showing interest, finding common ground, and matching your coachee's demeanor and language. In addition, the course covers ways to develop a positive coaching relationship, including letting coachees act autonomously and take responsibility, and helping them to learn and develop.

### Objectives

- recognize how to build rapport with a coachee
- build rapport with a coachee in a given situation
- recognize how to develop a positive coaching relationship with a coachee

## **7) Business Coaching: Conducting Coaching Sessions**

### **Course Summary**

An important part of any coaching session is asking the right questions. When you do this, your coachees will be more focused, attentive, and proactive in finding their own solutions. But you need to know what questions to ask, and in what order. It helps to follow a structured approach that guides you from a broad understanding of what your coachee is trying to achieve to a clear action plan with detailed steps.

This course describes how to carry out effective coaching sessions, including clarifying the coachee's situation and recognizing and determining the best options for your coachee to work with. Finally, the course provides actions for wrapping up a coaching session, including getting commitment, identifying obstacles, creating a plan with deadlines, and agreeing on support going forward.

### **Objectives**

- recognize how to clarify the reality of a coachee's situation
- use strategies to check the reality of a coachee's situation
- recognize examples of ways a coach can help a coachee assess options
- identify four actions used to wrap up a coaching session