

# CHAPTER

## Let's Talk: "Should I Say That?"

I MENTIONED THAT MANAGERIAL COACHING actually begins the day you hire a new employee, even during the job interview. Sports coaches have the advantage of seeing prospective team players on the field before they offer them a place on their team. That isn't the case for managerial coaches. While you can and should contact references, they aren't always willing to tell the truth about a former employee or even to speak with you about an individual. Some companies will give only the dates of employment and departure, job title, and salary.

That situation makes the decision to hire or not to hire dependent on the information you gain during your interview with the prospective candidate. I won't discuss here how you should conduct an interview; there are numerous books on the topic. Let me say only that you should indicate on each prospect's résumé any shortcomings in experience or skills you discover during the interview. Once you make your hiring decision, this information will be important in your role as coach, which should begin officially on the individual's first day on the job.

### **The Start of a Work Relationship**

Leslie is head of sales and customer service for Jewelry Line, an online jewelry company headquartered in the Midwest. She recently hired Gladys as a customer-service representative. Gladys had the basic computer skills but she lacked familiarity with one software program that the company used to maintain account information. She also knew little

about the company's product line. Leslie thought that Gladys could master the software program and, in time, would become familiar with the firm's products. Her skill gaps were shortcomings but they were more than made up for by Gladys's enthusiasm and evident willingness to do a good job. Most important, in Leslie's opinion, Gladys had a warm and friendly manner that past experience showed was well received by the company's telephone customers.

On Gladys's first day on the job, Leslie met with her to welcome her to the organization. She had already arranged for her new hire's desk to have all necessary supplies. She could have introduced Gladys to her co-workers, walked her to her work station, and left her there, but Leslie also wanted to review with Gladys some important corporate *and* department policies and to explain her desire to meet regularly with staff members in the quiet of her office to discuss their progress with the work. In other words, Leslie wanted to introduce Gladys to the idea of regular coaching sessions.

The meeting with Gladys began with a discussion of Jewelry Line's vision and mission and its place in the industry, including the names of some competitive firms—both stores and online sites like Jewelry Line. She suggested that Gladys spend some personal time familiarizing herself with the company's Web site, but she also recommended that her new hire visit the competition, including bigger outlets like the Home Shopping Network, to familiarize herself with their offerings.

Next, Leslie talked about her own management style. For instance, Leslie preferred one-on-one conversations with staff members rather than conversations via e-mail. She felt that knowing her staff members helped her to supervise them; interpersonal communications gave her more opportunity to find out about her customer-service reps. She shared with Gladys her own experience as a customer rep with the company, her rise to management, and her goals for the department.

Then, Leslie discussed some of the rules she expected staff to follow. Most important, there was the need to have phones covered at all times. Even a visit to the ladies room demanded that a colleague be alerted at busy times so calls weren't tied up. No caller was to be kept waiting for more than three minutes, Leslie explained. The staff of five customer reps needed always to be ready to answer a colleague's phone in the individual's absence. Staff also had specific time to take lunch—60 minutes, no more, from noon to 1 or 1 to 2. The company maintained a cafeteria, and staff members could buy their food or bring their own. There was a lounge to warm TV dinners or reheat food cooked at home.

Extended lunch was not permitted except with supervisory approval and arrangements for phone coverage had to be made in advance.

Tardiness and absenteeism were also issues mentioned by Leslie. “We offer 24/7 service to our customers. We have operators abroad who handle evening orders,” she explained. “But staff here must be at their work stations by 8:00 A.M. and stay until 6:00 P.M., at which point calls are transferred to our overseas service.

“I understand that transportation and family problems can occur that can delay arrival to the office,” Leslie continued. “Certainly we can all come down with a cold or other illness. But I expect staff to contact me as soon as they know they will be late or won’t be in the office so I can arrange for coverage of the phones.”

As Leslie spoke, Gladys kept nodding her head. She thought that Leslie had the right to be concerned about these issues, and she knew that she would do her best to comply with these requirements. Since she had been a full-time mother for over ten years, she had worried that she would not be trusted to juggle her family commitments with her work responsibilities. The decision to hire her had surprised and pleased her. “Leslie trusts me,” Gladys thought.

But Leslie’s next remarks made her wonder just how trusted she was. Leslie told her that she would want to meet with Gladys for an hour every second week to discuss her progress on the job. “Why would she want to meet with me?” Gladys asked herself.

“Leslie,” she said, “please don’t worry about me. I appreciate your giving me this job, and I’ll make it a point to abide by your rules.” As Leslie listened to Gladys, she could hear both timidity and worry. A supervisor for over ten years, Leslie recognized that Gladys wasn’t concerned about her ability to do the job or her compliance with the rules. Gladys was worried about the prospect of meeting regularly—specifically, why.

Leslie asked, “You sound uneasy. Did I say anything that upset you?”

Gladys replied, “Yes. When you hired me, I thought you felt I was qualified for the job. Now you are telling me that you plan to check on me regularly to see if I fit in.” Leslie smiled. “Gladys, you misunderstand. I meet with all my customer-service representatives. It enables me to find out how I can help them do their job better. And it gives you and your co-workers the opportunity to let me know what you think we can do better to accomplish our goals.”

Leslie continued, “The new software program you’ll have to learn came about from one such meeting with your predecessor, Irene. She loves working with computers and she had learned about the program

from a computer geek she knew. Irene suggested we look into its use here. After some study, I agreed with her that it made tremendous sense—it allowed for faster information entry. Irene isn't with us in this office because she's abroad teaching our overseas service how to utilize the system. When she's done, she'll be working with IT full time."

Gladys looked up. "So you want my ideas about how to run the department?" she asked.

"Yes. It's a little early for that but, in time, as you become familiar with how we operate, yes, I'd like to hear any thoughts you might have about how we can be more efficient or effective in our work. That's one reason I'd like you to check competitive Web sites. Most of our customers are homemakers like you were, and I hope you can make some suggestions about how we can upgrade our Web site to appeal to that market." As Leslie finished, she saw Gladys's smile return. "Now," said Leslie, "let's talk about how we can get you working on our software program. What do you think about . . . ?"

Leslie's first coaching session with Gladys was very effective. She reviewed with her some of the information that they had discussed during the job interview that Gladys would need to know now that she had the job—like the department's mission, her style of management, and the requirements of the job. Leslie knew how stressful a job interview can be and how likely it is for a candidate to focus on leaving a good impression with the interviewer and not hear, let alone recall, all that is said during the meeting.

After the fact, Leslie also felt that she had made a good hiring decision. Gladys wanted to do a good job—which experience told Leslie increased the likelihood by 50 percent that she would do just that. Leslie also recognized that Gladys could be sensitive and she made a mental note to herself to use her future coaching meetings with Gladys to reassure her that her time as a full-time mother, away from the workplace, wouldn't be held against her.

She also addressed a problem that sometimes arises when a manager decides to meet regularly with staff members for the purpose of coaching. Even if all goes well with the meeting, given the uncertainty associated with job security today, many employees worry that their manager is either unhappy with their work or—worse—looking for reason to justify layoff or termination, particularly if the company has an employment-at-will policy. So it's important for a manager to explain the importance of coaching to the employee. Of course, that is much easier if the individual is new. But if you plan to coach current staff, you will have to offer

some reassurance during the first meeting with employees. So Mariella, another manager, discovered.

## Introducing Coaching to Staff Members

Leo was the first employee scheduled to meet with Mariella, his supervisor. She had announced at the operational meeting the week before that she planned to meet bi-weekly with each member to discuss his or her work so as to monitor progress against goals set at the start of the year and to identify opportunities for operational improvements. She suspected that one or two of her workers needed more direction—in particular, how to prioritize their tasks—to ensure that they completed their work on schedule. So Mariella planned to discuss that as well—in particular with two of her employees, Laura and Pat.

By meeting regularly with staff members, Mariella fervently hoped that everything in the department would run more smoothly—or, at least, as well as it can in today’s leaner organizations. It seemed that crisis management was the order of her workday. This meant that she didn’t have the opportunity she always wanted to tell staff members when they had done a good job. Mariella hadn’t said so at the operational meeting, but she hoped that the coaching sessions would give her an opportunity to praise some of her staff members for their hard work.

Mariella realized that her own busy schedule kept her from acknowledging the fine job some of her staff did. “At least, these regularly scheduled coaching meetings will ensure that every one of my seven employees will get my full attention for one hour every two weeks.” In talking to a peer, Mariella had said just that. Her colleague, Ralph, had laughed, but he had to admit that Mariella had a point. The pressures of the workday gave managers little one-on-one time with staff members. “I’m ashamed to admit it but I don’t spend much time with my staff. Mariella, you may have an idea there. Let me know how it works out. I might try it with my six workers,” he said.

Mariella hadn’t expected her staff members to be concerned about these meetings, but her meeting with Leo, admittedly someone who was a worry wart, suggested how uneasy her staff might be about her plan. As soon as Leo sat down, he asked Mariella in a belligerent tone, “So, what’s the problem?”

Mariella was surprised. “There’s no problem—at least, I don’t think so,” she replied. “Is there some problem I should know about?” she asked, concerned with Leo’s reaction.

"Not really," he said. "I'm swamped with a load of marketing jobs on my desk, but that's not unusual." He seemed eager to leave and started to stand up.

"Wait," said Mariella. "Is there something I can do about the situation?"

"Sure," said Leo. "Hire clerical support for the department so we aren't buried under all the paperwork that goes with the assignments we get. I know that's out of the question, so there's no point in talking about it."

Mariella wasn't so sure. Before discussing the idea that Leo had suggested, she decided to continue her discussion about Leo's assignments. "Will you be able to complete all the marketing jobs on time?" she asked.

"I might miss a deadline here or there by a day, but that's also not unusual." Feeling on the defensive, Leo decided to ask Mariella the question he had been holding in since he first heard about these meetings. "Okay, Mariella, what's the deal here? If you're looking for an excuse to downsize the department, you won't find it based on these meetings—we're doing more work, not less. But I know that won't matter to senior management."

On the defensive herself now, Mariella replied, "Admittedly, in the past it hasn't mattered to some members of management. But it has always mattered to me. I know how hard this department works, and we can't spare a single employee. My intention in holding coaching sessions is to find ways to help you. Tell me a little more about the jobs that may not be finished in time."

Leo described three projects. One had been delayed owing to the product manager's failure to get all the information to him on time. The second job needed little work but kept being put aside as new work came into the office. Mariella wasn't too concerned about these two jobs, but she was very upset when she learned that the third project involved market copy for a new product to be introduced at an industry conference two months away.

"I know that it should get immediate attention, but I just can't seem to get to it," said Leo. "I start to work on it and then someone comes to me with a rush job. I finish that and begin on the copy for the product introduction and suddenly I'm called into a product meeting or given another rush job. I seem to spend most of my time firefighting. I figured that I'd come into the office this weekend and get caught up. My mother

promised to stay with the kids on Saturday. I can't stay late during the week because I have to be home when the kids finish school."

Mariella recognized that Leo was a single father with two young children, and she could understand why he couldn't stay late or work at home in the evening with an eight-year-old and a five-year-old to care for. A mother, Mariella had little time for work once she got home—and working late into the night only tired her the next day.

"Leo, I'm glad we talked. I hadn't realized how heavy your workload was. I'm particularly concerned about the new product market campaign. Unless you object, I'd like to reassign some of your work to one of the department's staffers. Worst case, I'll bring in a creative temp to help us to make sure that you finish that job on time. I don't like any staff member having to rearrange their life to work weekends here in the office. What do you think?"

Leo was delighted but a little uneasy about her suggestion. "If it won't be seen as my trying to get out of work, that would be great," he said. "Could you really do it?"

"We have the money in the budget to do it," said Mariella. "From what you said, I have another idea. I can't justify hiring a staff member to provide clerical support but we could hire a marketing temp for the entire department. The person could take on some of the smaller jobs, assist with some of the crises around here, and even process some of the paperwork. What do you think?"

"I think it's a great idea. So will the rest of the department. I expected bad news from this meeting, not such good news. We should have talked about my work situation earlier."

"That's the reason for these coaching sessions. My intention is to learn more about the work you're doing and to identify ways to help you—from reassigning work to identifying training opportunities, to stepping in to find ways to ensure that you continue to do good work. Which reminds me," said Mariella, "I've been so busy that I didn't have the chance to tell you how well your e-marketing campaign did. Several people in the organization have complimented me on it."

Not all of Mariella's coaching sessions were as productive as that with Leo. She did suggest to Pat that she was unnecessarily spending time rewriting marketing campaigns that required nothing more than quick updates and Laura and she spoke about Laura's need to better organize her work day—in fact, Mariella recommended that Laura look into a time-management course. All in all, Mariella felt that the six or so hours she had devoted to coaching was time well spent. When she shared her

experience with Ralph, he agreed—and told her he planned to try the idea himself. Mariella planned to continue her sessions with her staff members.

Needless to say, Mariella implemented the plan she described to Leo, which made him a spokesperson for coaching sessions both within his own department and in the organization as a whole. He saw it as a means to get his boss's full attention for at least 60 minutes, and he subsequently planned what he would want to cover during his coaching meetings with Mariella, including any problems he had, progress on various campaigns, and—yes—some of the marketing campaigns he was especially proud of and ideas he had for better controlling incoming assignments. All in all, the sessions proved helpful for everyone once they became familiar with the idea.

## The Coaching Interview

The purpose of the coaching interview is to exchange information. Ideally, feedback will be positive on both sides. The manager, in his or her role as coach, will have nothing but good things to say about the employee. The situation is likewise for the employee. If your staff member has encountered a problem in his or her work, given your experience and position, you should be able to come up with an action plan to address the situation.

The goal of coaching sessions is to address the problem before it becomes a serious performance problem that necessitates a counseling session.

Let's start with this simple situation. Nancy, a correspondence writer in the sales department, was complaining about her workload. Jacques, her manager, couldn't understand the problem. Nancy's predecessor had no problem with the number of letters that she handled. Jacques asked how many letters she did weekly, and the number was no larger than that of Margie. So Jacques asked to see the letters. Let's take the conversation from there.

Jacques: You are doing a conscientious job, Nancy, but if you don't mind I have a suggestion to offer.

Nancy [uptight]: No, I guess not. What's wrong?

Jacques [holding three- and four-page letters in his hands]: Nothing is really wrong. You have all the facts right, and your ideas

are good. But these letters are too long and wordy. Let me see if I can find a letter from one of your peers. It was in reply to a similar billing complaint but he took only a page and a half to address the issue. Do you see what I'm saying?

Nancy: Yes. I am doing a lot of extra work unnecessarily.

Jacques: Yes, but it is more than that. You are asking consumers to get to the point of the issue in more time than would seem necessary. That can be annoying.

Nancy [nervous, feeling threatened about her job]: What do you want me to do?

Jacques: Nancy, I know you want to be thorough but I believe that you can write more concisely. To begin with, compare your letters with replies to similar problems done by your predecessor. Next, let's you and I sit down and I'll give you some tips on how to make your correspondence shorter and more effective. Your sentences should be succinct, not long. If you need further help, I'll sign you up for a business writing course.

So, Jacques assumed the training role of a coach.

## Lending a Helping Hand

An executive can also be a coach to one of his managers. Lou, vice-president of shipping, was concerned because work on an important project was delayed. He decided to bring it up during his coaching meeting with Terry. In previous coaching sessions, Terry had talked about problems in getting commitment to the effort from members of the group. Lou wanted to find out if the problem was continuing. After complimenting Terry on a business plan she had completed for a new business relationship, Lou asked Terry how the team's effort at identifying candidates for strategic alliances was going.

"I guess that it is going as well as can be expected," Terry replied. "I can't seem to interest the group in the project. Since our mission is only to identify prospective candidates, not to initiate any contacts or contract projects with companies, members of the group drag their feet in doing research on the companies we identify."

"That's unfortunate," said Lou. "What do you think could be done to motivate the team?"

Terry thought for a moment and then said, "If our authority can't be

expanded to allow us to make contact with prospective strategic partners, maybe we should reassign the work to someone with the authority to do more than visit one Web site after another.”

Lou realized that Terry's team members weren't the only ones who needed to be re-motivated about the project. “Were we wrong to set up a team to investigate prospective corporate partners?”

“Yes, I think that you and others in senior management would have been better to keep the work to yourself. I guess that I agree with the other managers on the team that we have more than enough work than to sit around and come up with ideas that no one will want.”

“I disagree. I know Jed, our CEO, and the top team, including me, think that you are the right people to bring prospective candidates to our attention. After some serious thought, including hiring a consultant to submit suggestions, we realized that you and your peers were closer to the kinds of operational issues that could be the basis for increased sales or reduced costs through joint ventures and other partnerships for our company. I still think that's true. But clearly we haven't sold the idea to you and the other members of the cross-functional team. How can we do that?”

Terry thought for a moment. “It would help if Jed sat in on a meeting to show us that he cared about the work we are doing,” she said. “We have also submitted several recommendations to top management yet have heard nothing. Maybe a status report would demonstrate that our ideas aren't just being gobbled up into a big black hole.”

Lou replied, “Terry, I guess that we haven't really supported the team as well as we could have. I'll talk to Jed to see if he can attend the next meeting. I'll also get an update on the suggestions your team has made to date. I seem to recall that one of the four ideas is being explored by marketing. We can get back to you on that. And . . .”

Terry interrupted, “Let us know, too, why ideas were rejected. It would help us with future work.”

Lou then paused. “Terry, I think that you have a great idea there. Your team may need further direction from senior management. What do you think about bringing your team together with members of top management and, maybe, having an authority on strategic alliances present to teach us all a thing or two about the idea?”

“That would be great, Lou,” Terry said. “I've read that strategic alliances can be the basis for competitive advantage. We're nothing like Cisco, Starbucks, or the other companies that use them, but we could

learn from them. Do you think we could invite someone from one of these companies to visit?”

Lou thought for a moment. “I can’t promise that, but I can see if there’s someone from a firm with experience in strategic alliances who could visit the team, even run a full-day workshop to teach us all about how to do this a little better.”

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Note that the feedback during this coaching session was two-way. The conclusions reached weren’t solely related to Terry’s effort to lead the team: they had corporate implications. Lou learned that there was more that senior management had to do to make the team effort a success. Unfortunately, the team’s lack of enthusiasm was due to failure by top management to communicate just how important its work was. And the idea of training—for both top management and the team—made a lot of sense. Indeed, as Lou thought about it, maybe the company should consider a more structured program, with a dotted-line relationship to the CEO office.

As you can see, once managers and employees become familiar with the idea of coaching sessions, they can see the benefit of meeting with their supervisor and sharing face time to discuss work, ideas they have, problems they are encountering, and even the reasons behind decisions made that can influence their work. Coaches can recognize good work, identify opportunities for training, brainstorm more effective ways to get the work done, and otherwise improve the performance of their employees. At the very least, coaching sessions prevent work problems from escalating by making managers aware of difficulties and, with the employee, coming up with solutions.

As you will experience, a coach will encounter a variety of situations. The secret is to approach this meeting so that your staff member sees it as an exchange of feedback and an opportunity to come up with solutions to problems he or she is experiencing. And, most important, you perfect the knack of phrasing information-gathering questions so that you get the information you need to help your employee do his or her job well. And, maybe like Lou, you can even identify a corporate competitive advantage.