

6

Developing coaches for managing people

In [Chapters 3, 4 and 5](#) we introduced you to the cornerstone of our approach to managing people – workplace coaching. Central to our discussions was the changed nature of workplace relationships, the importance of the coach being involved in getting the right people on the team, the activities involved in workplace coaching, and the principles that should be in place to ensure success.

Our discussions extended to the kitbag of competences required for a coach to operate effectively on the job on a day-to-day basis through the provision of informal feedback, and off the job through the provision of feedback during a formal review. To operate as a coach on a day-to-day basis requires both competence and confidence in the normal management role, and extending these to include the ongoing development of each employee, and when it is obvious coaching is not working, the necessary disciplinary action. [Chapter 7](#) deals with this.

We begin with some observations:

- We do not believe that line managers have the kitbag of competences and behaviour required to engage in workplace coaching as part of a comprehensive approach to managing people.

- Many organizations approach the preparation/development of workplace coaches through training based on what senior managers think will be good for them.
- Far too many training programmes are taken off the shelf; worse, are based on bite-sized learning rather than a holistic approach.
- Many organizations do not apply the process described for getting the right people on the team.
- Learning (or training in this case) must be directly related to the expectations (performance and behaviour) the coach is required to demonstrate as part of the organization's purpose-designed approach to managing people. Learning must therefore focus on the development of a unique set of competences that allow this to happen.

Senior managers want results. However, as far as providing learning opportunities that genuinely respond to employee learning needs and deliver real development, they often do not do what they need to do to get it right. The individual and team development plans that fall out of the formal review process and reflect, in part, day-to-day feedback, necessitate genuine responses to learning needs. The same process must apply to the learning provided to those line managers who will act as workplace coaches and are responsible for the development and maintenance of these plans.

In summary, the development of competent and confident workplace coaches is one of the critical success factors in managing people. To assist you in taking charge of the developmental process, we have structured this chapter in two parts: A, Learning design, and B, Training design.

All involved need to recognize and deal with the reality that quite a few things will change as a result of this approach. Line managers will see themselves and colleagues behaving in appropriate and inappropriate ways. Each will be asked to change the way they behave. They will receive direct, hard-hitting feedback that will build solidarity in the way people are managed.

Part A, Learning design, focuses on how we manage learning. It consists of our approach and incorporates the activities that drive learning and how we assess (make judgements) on the extent to which learning is successful. Part B, Training design, focuses on how we facilitate learning so that we make sure it is successful and achieves what we have forecast it should achieve (outcomes).

In summary, Part A is about the learning process. It is about designing activities that allow the acquired competence and confidence to be transferred from an artificial workplace environment to the unscripted world of work. Part B is about how we as trainers and purveyors of learning engage in complementary activities that drive the learning process. This is where

we adopt the role of learning facilitators and collaborators. It is of little consequence what you call yourself when involved in these activities; it is what you do that matters. However, more of that in Part B. For now we turn to Part A, Learning design.

A: LEARNING DESIGN

Designing learning so it is right

The world of work has become overrun by people flogging the competency-based movement. What should be simple has, for many organizations, become cumbersome, arduous and expensive. This is not a book about theories of learning. However, we will describe our approach in broad terms, which ensures that when we engage line managers in learning how to become effective workplace coaches, we follow a tried and true strategy.

We use a performance-based and criterion-referenced approach to learning. 'Performance-based' means the competences and behaviour required of a coach must ultimately be demonstrated on the job under operational conditions without supervision. 'Criterion-referenced' means the nature of the performance, the conditions under which or with what the performance will take place, and the standard of performance required, must be clearly specified and replicate the world of work.

Performance-based learning requires assessment of performance (feedback on performance through learning). Once we know the performance required of workplace coaches, we design the assessment process. When you change the way you assess people, you change the way you teach people. You change the way people learn. This is critical – learning by doing, not through telling and listening, although sometimes this will occur.

This simply means our assessment process involves demonstrating competence and behaviour in real-life simulations, leading to actually doing it on the job, initially with a support person. Assessment design up front has a major impact on how learning will occur and how it must involve practice, periods of consolidation and constant application. We recreate life in the organization and acknowledge it is based on the goodies and baddies who live in it. There is no point creating a pure, clinical environment just because one of the senior managers is religious and doesn't swear. The learning environment is mediated by the culture and behaviour that exist. We do, of course, work to change this in order to build respect, truth and honest relationships as part of learning.

Formal assessment ultimately takes place when the learner is confident to perform on his or her own. This is also where support personnel expand their role to include formal assessment as required. Depending on the size of the organization, this may become a major consideration in learning design (we still have to run a business). In assessment terms, it is not just about suitability and cost-effectiveness, but results.

At the end of the day unless someone can perform on the job under operational conditions without supervision, they cannot be deemed competent or confident, so their likely performance on the job is questionable. We also acknowledge there are lots of confident incompetent people around who fall into categories of:

- unconsciously incompetent;
- consciously incompetent;
- consciously competent;
- unconsciously competent.

In summary, the design of learning for workplace coaches requires:

- a clear specification of the performance required on the job, day-to-day;
- a clear identification of what needs to be learnt to match the performance required;
- an assessment strategy to assess the performance required;
- a clear plan of how learning will be acquired and applied;
- a clear plan of the resources and support necessary, and how these will be managed to ensure sustainable and confident performance over time.

We need workplace coaches who have the competence, behaviour and confidence to operate with their team, on and off the job, with the support of skilled facilitators of learning, acting as mentors/coaches in the workplace during the development process. The design of learning should be simple and clearly structured. We provide a structure consisting of five steps to ensure success, summarized in [Figure 6.1](#).

To date we have not been prescriptive about what coaches need to learn. This may vary within organizations. But we have, in [Chapters 4](#) and [5](#), provided a clear guide by describing what is involved.

We now turn to what we call a 'building-block approach' to the development of workplace coaches. We translate what we have said thus far in this

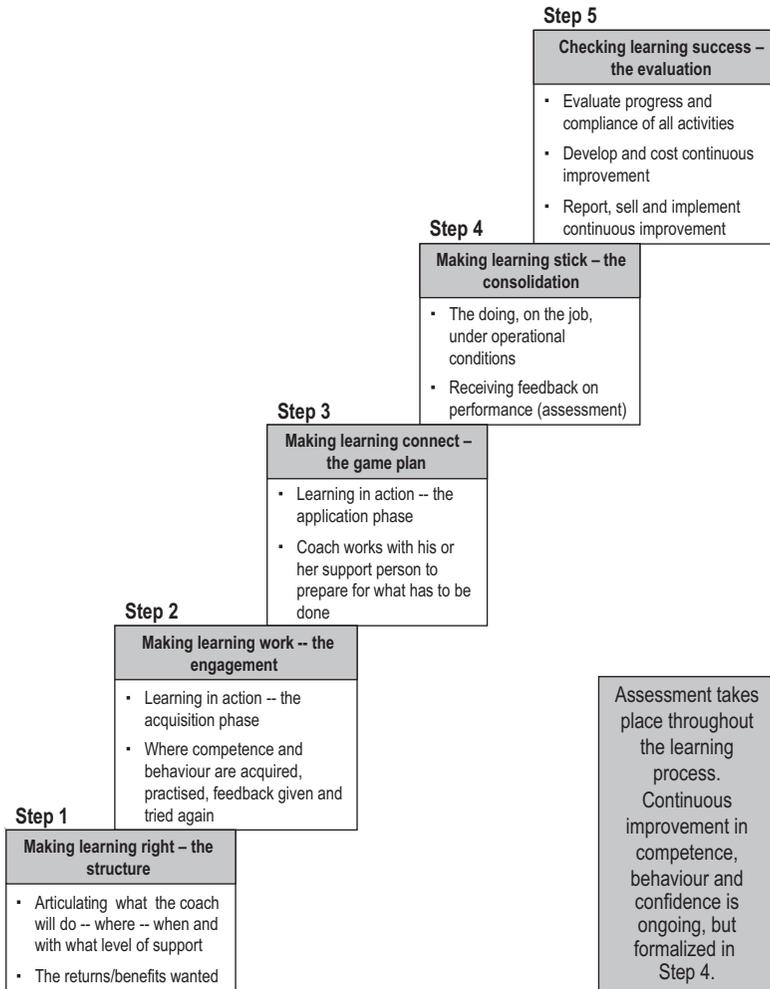


Figure 6.1 Five steps to managing sustainable learning

chapter into five steps for sustainable learning, describing what must take place at each step. We call these five steps the ‘management of learning’.

Before we commence our walk up the steps to sustainable learning, another suggestion. Our approach will require the coaches to learn in different ways. This means hard work. Some will complain about how hard it is. Senior managers will need to be clear and supportive of the learning process. Learning, which is purpose- designed to assist coaches to do their jobs better, requires a ‘can do’ mentality.

To reach this state of mind, the learning process must be transparent and provide the right mix of know, do, think and conform to (comply with). It must also be designed so coaches are able to transfer their learning to current

and new situations. Diagnosis, problem solving and troubleshooting must be integrated into the learning process.

Five steps to managing sustainable (lasting) learning

Figure 6.1 consists of five building blocks. These building blocks represent a sequence of critical activities that must occur to ensure that the learning provided to coaches is relevant, interactive, sustainable, and works. The five building blocks are steps:

1. Making learning right – the structure.
2. Making learning work – the engagement.
3. Making learning connect – the game plan.
4. Making learning stick – the consolidation.
5. Checking learning success – the evaluation.

Each building block has a clear statement of performance, for example: Step 1. Making learning right – the structure, and a brief description of what needs to occur.

Step 1. Making learning right – the structure

If we want capable and confident workplace coaches, the organization, through its senior managers, must be totally clear about what they want them to do and the level of commitment and support to be provided. There must be total consistency – clarity of what people management means to the organization, the principles to be applied, and the practice required of line managers when acting in their role of workplace coach. This commitment must extend to the need for consistent vigilance and action over excellence and underperformance.

There must be total consistency in how areas of performance improvement/development will be dealt with. All managers and coaches must ‘sing from the same hymn book’, and all employees must know what hymn is being sung and the key it is being sung in.

Step 1 also represents what all the employees in the organization need to know about managing people, its principles and practice, and how it can be made simple. Members of the shop floor team – the recipients of coaching – will need to know how it will operate and the returns/benefits that will flow, in particular the consequences if they do not respond to the feedback and plans to improve their individual performance as required. (See more in [Chapter 7](#).)

Step 2. Making learning work – the engagement

This step is where the coach begins the interactive learning process, where competence, behaviour and confidence (capability) are acquired. It is where purpose- designed learning activities allow the coach to see and experience underperformance, inappropriate behaviour and a lack of confidence when dealing with an employee. It also allows each coach to witness the reverse: exemplary approaches to dealing with an employee who is either underperforming or performing excellently.

There is an opportunity to make a first-hand assessment of what not to do and make judgements about how to do it. It provides a powerful tool for retentive learning. Each coach is involved (as are the learning facilitators) in the interactive learning activities by getting their hands dirty and is provided with objective feedback, particularly from peers, as well as the facilitators. The focus is on continuous improvement and opportunities for further practice and consolidation, and the development of a can-do mentality.

In designing learning activities, it is important not to create a circus. Learning should not be totally activities-based. There must be some down-to-earth knowledge building through formal presentations, and higher level thinking through questioning, scenarios and case studies. It is a 'horses for courses' approach.

Our recommendation is that case studies or scenarios, using fishbowls and triads, are the best way to acquire and apply competence, confidence and behaviour for this learning need. These allow the coach to experience the feeling of getting it wrong and getting it right; to receive feedback and suggestions for improvement; to practise again in an atmosphere of assault, support and continuous improvement, but flavoured with a pinch of discipline as required.

Case studies and scenarios must be organization-based, using real-life workplace examples, but avoiding personalities. Each must be carefully scripted to meet the specific learning outcome sought. It is the fishbowl approach (gazing in from outside) which brings each learning situation alive. It simply means being able to see them in action and detect what is going on, make judgements about what is seen and, more important, how to do it better by rectifying one's behaviour.

Step 2 is where the essential capabilities for a coach to engage employees, whilst operating both on and off the job, are acquired. The coach learns to:

- provide performance feedback;
- engage employees in the workplace;
- manage underperformance;

- gather evidence;
- prepare for a formal review;
- conduct a formal review.

This learning is designed to be interactive. Examples of how learning is made interactive are provided below.

Fishbowls

Remember these must be organization-based, not taken out of a book. They must be carefully scripted and totally focused on the knowledge, skills (practical and low and high level thinking) and attitudes to be acquired and later applied. Some would argue these have to be sanitized. We say no. They must replicate what goes on in the workplace. This is particularly important because, in the case of a code of conduct, it represents the behaviours we are seeking to change. We make the point here that fishbowls and triads coexist as part of learning.

We use fishbowls to deal with competence, either unacceptable or excellent performance. It involves the coaches in learning and might require one to play the role of an employee who is working on the job, and is approached by a coach who has detected non-compliance to a standard of performance. It may be a breach in safety, incorrect use of a piece of equipment, or incorrect posture at a computer. It might be an unacceptable level of untidiness or incorrectly dealing with a customer or student/fellow teacher (building blocks 1 and 2). This is where the GIDAY strategy comes alive. The coach and the employee act their individual, tightly-scripted role, under the observation of the learning facilitators and other coaches in training.

It is imperative that a thorough debrief occurs and the performance of the coach is put under the microscope. This process creates great opportunities for learning. Often skills that can never be read about in books are demonstrated by the coach. (Many coaches who see themselves as poor communicators are often the stars. Never underestimate the capability of any line manager.) Coaches learn other ways of doing. Additionally, some coaches, unhappy with their performance, want to try again using the feedback they have received.

We also use fishbowls to deal with conduct. For example it might be unacceptable levels of absenteeism, or unacceptable behaviour as a team member.

The success of fishbowls based on purpose-written case studies or scenarios cannot be overstated. Their greater value is when each is extended to include changing circumstances. For example, a coach approaches an employee who is continually late. Using the GIDAY strategy, he receives an undertaking from the employee that he or she will improve. Alas, two weeks later the employee is back to unacceptable behaviour.

The use of the original case study/scenario to expand into more serious examples of unacceptable performance and conduct allows for the introduction and development of skills in dealing with conflict, negotiation, counselling and discipline.

Triads

This is a first class strategy for allowing coaches to get their minds tuned into conducting a formal review and feedback session in a workshop environment. Each coach prepares for their first formal review by selecting a member of their team who has a mixture of excellent and underperformance.

Evidence is gathered and documentation is completed, based on facts about the team member in key expectations. This is finalized and time spent on preparing for the review. In doing so, each coach uses the tools developed to help the review in being conducted reliably and professionally.

Coaches are divided into groups of two and are allocated a support person who will observe each coach in turn conducting their review (hence the term 'triad'). The second coach plays the role of the employee and reacts to the feedback given. There is no specific script, but the second coach uses the competence and behaviour acquired during the learning to react accordingly. For example, the evidence might be suspect without actual examples; there may be surprises, evidence may not have included one-up manager feedback. It becomes the role of the coach to sell the integrity, validity and fairness of the review. The role of the other coach, as employee, is to challenge realistically what is presented.

By the completion of Step 2, those coaches who are likely to struggle have been identified. An individual development plan designed to provide specific assistance on an ongoing basis has been prepared and discussed with the coach and their support person.

Step 3. Making learning connect – the game plan

This is where the quality and integrity of learning are put to the test. It is where a substantial portion of the learning is applied. The coach now returns to the workplace to prepare for a formal review. It is where much of the competence and behaviour acquired now finds its home.

Step 3 is where coaches learn how to:

- gather evidence;
- complete the documentation;
- plan the process;
- rehearse the process.

The gathering of evidence does not present any great difficulty. In fact, most coaches realize how critical evidence of performance is in the formal feedback process and spend a lot of time consulting with one-up managers and getting it right.

Completing the documentation rarely presents a problem. Because the evidence gathering has been so focused, the subsequent completion of rating scales is clear and precise. However, it is important that the rating scale is clear, specific and easy to complete. (See examples in [Chapter 5](#).)

Planning the process, and rehearsing the process, is often where the ‘butterflies’ begin to emerge. Butterflies are directly related to the known behaviour of individual team members and perceptions of likely individual reactions.¹ At this point the support person needs to be tuned into the level of support required. Each coach in training is provided with quality control sheets that set out the process of planning and conducting a review; however most still need support aimed at further confidence building.

This is an important time in the learning process for coaches and the implementation of people management. This is where the commitment of senior managers in the organization, to supply the resources and support, is put to the test. Without continued support the entire learning process is put at risk.

We now move to a critical phase. This is where we want those competences and behaviour learnt and practised by the coach to stick. Learning cannot be said to have stuck unless it is applied consistently on the job. There is a need for day-to-day, week-to-week use. When the design of learning is correct, sticking means continual use. (It is the transfer of learning from the training room to the real world of the unscripted workplace. This is the challenge of any learning/training.) It is an extension of relevant learning – learning that is right for the needs of the coach whilst managing the performance of the team.

Step 4. Making learning stick – the consolidation

This step is where the main game occurs. All the learning, practice and preparation are applied to the conduct of a formal feedback session with an employee. At this point of learning the coach is conducting a benchmark review (see page 63) where no final judgements are made on new evidence introduced at that time. Any new evidence that has not been discussed with an employee in the workplace (GIDAY) has been gathered during Step 3.

This is also where excellent performance is acknowledged. Our experience has been that many excellent performers are often unaware of their level of performance because feedback in most organizations is only given when an employee messes up, or because their positive contributions are far too often ignored or feedback is seen as unnecessary amidst a busy work schedule.

Following a final double-check of what is required, the coach then commences the formal review by focusing and reaching agreement on:

- where the employee is now;
- where the employee should be in six months;
- what plan is needed to improve/develop the employee;
- implementing an improvement/development plan;
- monitoring the improvement plan in the workplace – is it happening?

The focus on improvement covers those areas described in Steps 1 to 5 on pages 87–94. The importance and benefit of the benchmark review as part of the learning application is that it makes allowance for the coach making some minor errors. Ultimately, it is about the coach and the employee reaching agreement on the performance and conduct indicators.

During the learning consolidation process the coach is using purpose-designed quality control sheets. They guide the coach to deal with excellent performance first, then move into areas for improvement, reaching agreement on areas for improvement/development, and completing a plan that details what will happen from here on.

Finally, the coach evaluates the progress of the plan. The coach:

- ensures the plan is implemented;
- checks on the employee's progress;
- targets any difficulties;
- provides support, encouragement and feedback;
- organizes and conducts the next formal feedback session;
- continues the coaching process on the job.

These activities require the coach to increase his or her visibility on the job. It is imperative a coach does not spend his or her time warming an office seat at the expense of being constantly seen. Such behaviour is always a reliable indicator of pending trouble at any time in our approach to managing people.

We conclude this step with an emphasis on another aspect of learning that receives close attention during Step 2, Learning – the engagement. In some organizations, employees may want to bring a union official when they turn up for their benchmark review. Chances are the review will turn into a dog fight if the union official and employee have preconceived views on the

validity and reliability of the evidence or the motives of senior management. Union officials will turn up if the entire people management process has been badly communicated or poorly sold to employees, or lacks total commitment from the top. This can often be viewed as organized labour using adversarial tactics to discipline poor management.

Step 5. Checking learning success – the evaluation

This step is about getting feedback on the extent to which the organization's investment is having the desired impact. This is not a book about evaluation, but it is about obtaining evidence if:

- coaches are operating effectively both on and off the job (effectiveness relating to the detection of underperformance);
- support people are providing the level of support required and this support is having a real impact on the work of coaches;
- improvement/development plans are meeting individual and team learning needs and are having a direct impact on improving the way work is done;
- the cost of improvement is being related to real financial gains in the workplace, for example:
 - improved safety performance (reduction in lost time injuries),
 - reduction in rework,
 - improved equipment reliability,
 - reduction in absenteeism/truancy,
 - reduction in customer returns,
 - improved team/workplace morale,
 - reduction in customer/student complaints.

Some of these will be able to have a financial value put on them; others will be nebulous but important, such as improved customer satisfaction. (This will be dealt with further in [Chapter 8](#).)

Reporting on progress and improvement should become a good news story. All employees have been involved in the development of the people management system. It becomes a critical task to report to them on its impact and success.

There is always room for improvement. If the people management process is supported, the workforce will want to know how it is progressing and play a role in its improvement. Ultimately, it is about seeking continuous improvement in how people management is done.

Summary

Developing workplace coaches to operate and behave to a standard is a challenging task. To do it correctly, the organization, through its managers, employees and union delegates, must be totally clear and agreed on what competences and behaviour a coach must possess and how these will be acquired and applied to ensure success.

It must be acknowledged upfront that some line managers are likely to be poor performers. Our experience has been that these people fall by the wayside before or during the learning process. When this occurs, we argue it becomes nearly impossible to retain such a person as a line manager responsible for the performance of a team under their control.

Just as some employees will be underperformers, there will be underperforming coaches. In both instances, there may come a time when all help to improve has failed; when those managers responsible must move from coaching mode to discipline mode. We deal with this in the next chapter.

We conclude with a reminder. Should you want to implement a tried, proven and can-do approach to the development of your workplace coaches, remember, there is no substitute for a purpose-designed programme to fit your own organization.

We have consulted in organizations whose senior managers have wanted to take training programmes off the shelf or who want to provide small, bite-sized pieces of learning over time, for example, this month 'Negotiation', in two months 'Conflict Resolution'. It does not work if sustainable (lasting) results are required because it does not support a purpose-built people management system.

Another word of caution. Be careful who you select to conduct the training. We have seen academics make the journey from the classroom to a coal mine for the first time and, when confronted with employee resistance, they turn to water. This is not to say this is the norm. Nor is it to say a hard-nosed consultant will succeed when moving from the coal mine to a group of priests or nuns. Adjustments to style and language are always required.

In Part B which follows, we turn to training design. It is an overview of how we facilitate the learning process based on the culture of the organization (the way things are done), where the organization is currently, where it needs to be taken to and how the people management system will work. Our training design is a complementary process to learning design. It allows us to work and control learning for maximum benefit.

B: TRAINING DESIGN

Designing training so it is right

Part A of this chapter provided an overview of the learning process based on five steps to manage learning that lasts. Particular emphasis was placed on the design of assessment and how, when you change the way you assess and the way you teach, you change the way people learn. This is a major consideration for any training or learning facilitator.

Equal emphasis was placed on the importance of designing learning to be interactive. Examples of fishbowls and triads were provided to reinforce how learning must involve practice and consolidation. Part B gives a description of how we, as trainers (learning directors, facilitators and collaborators, used interchangeably) work and control the learning process.

We do this by breaking down each of the five steps to manage sustainable learning (see [Figure 6.1](#), page 87) into each of their own individual steps or building blocks. This allows for a clearer delineation of what it is we do when working and controlling the learning process. It is important to note that the last building block in each of the major steps shows the connection to the next major step.

We begin with a word of caution. Learning design does not begin where the learning process begins, in the artificial environment of a training room. Anyone seeking to develop workplace coaches must begin by being involved in gaining the organization's commitment to the approach to be used in managing people. This also requires being involved during the process of identifying and developing key result areas.

Critical point of linking learning design and training design

We issue another caution. You may find some repetition in what follows, but we believe this to be an advantage because the sub-steps actually specify what has to be done and draw together key elements of previous chapters. For example, you may say to yourself as you read, what is being described is in fact learning. It is really about being more specific about the role of the trainer in driving learning, taking control and working the process with authority. There is always a great challenge in the design of learning, exceeded only by the challenge to the trainer to be totally professional in the management of learning.

Irrespective of whether you are an external consultant or an internal consultant/employee, you must drive the process confidently, with a clearly

articulated plan of activities. If you do not, you will more than likely fail. There is too much at stake for this to happen.

The explanation that follows provides footprints to a clearly constructed plan. Much of it is self-explanatory. When you link Parts A and B of this chapter you should be able to successfully develop coaches for their important role of managing people. Whilst a plan is critical, you still have to manage the learners during a very difficult change process.

To assist you to follow the footprints, examine the chart shown in [Figure 6.2](#) as part of your preparation.² The chart is simple, but we must always be very clear about the role of each of these key players involved in learning. This allows the trainer(s) to ensure an uninterrupted process and target any non-compliance which ultimately may impact on the quality of learning.

Training design specified outcomes	BEFORE Preparation	DURING Off the job	AFTER On the job
Role of trainer			
Role of trainees			
Role of workplace management			

Figure 6.2 Training transfer model

You will notice the boxes under ‘Before’, ‘During’ and ‘After’ are empty. We invite you to fill in the boxes when you have finished reading this chapter. It will help you clarify key indicators for success.

Step 1. Making learning right – the structure

This step consists of five sub-steps or building blocks; see [Figure 6.3](#). The five steps provide an overview of what is involved. It provides the trainers, trainees and management a clear direction via the footprints that are to be followed. More importantly, it provides the trainer(s) with milestones that have to be achieved on the road to learning. No step begins unless the trainers have accomplished and gained agreement on what is required. For example, the

two larger boxes attached to sub-steps 4 and 5 are the lynchpins of step 1. If the contents set out in these boxes have not been scrutinized and agreed to by those being trained as coaches, success is less likely.

Another important thing to reaffirm at this point is that what is contained in each of the five sub-steps summarizes what we have discussed in [Chapters 1 to 5](#). The contents should serve as a quality control check. It should allow for the identification of any critical success factor that may have been overlooked. We encourage you to pause and imagine you are driving your organization’s approach to managing people. Irrespective of whether you are running the training you should now be in a position of clarity and confidence as to how to proceed.

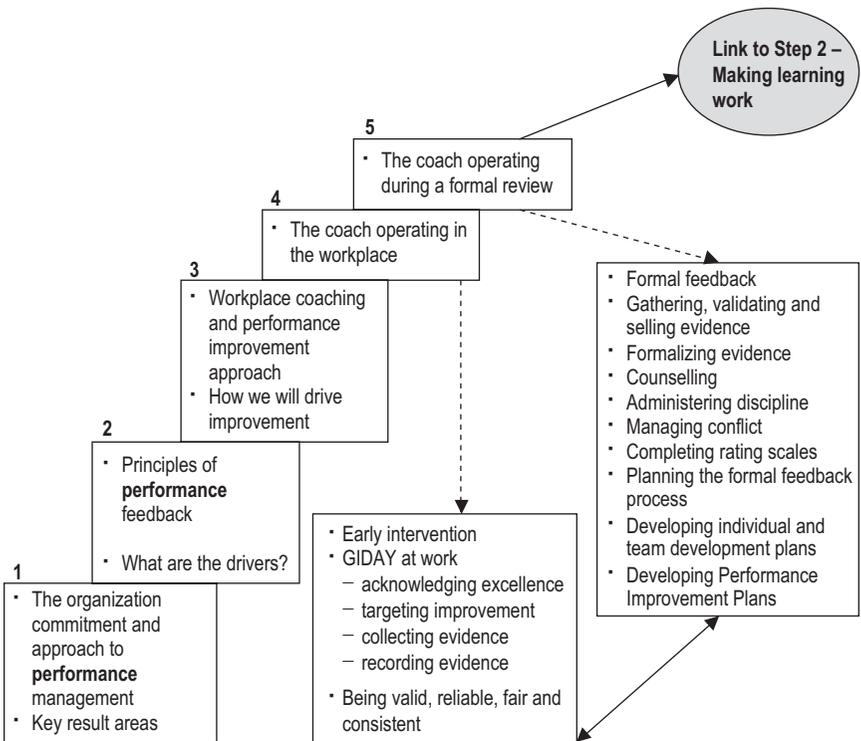


Figure 6.3 Step 1 – Making learning right – the structure

Step 2. Making learning work – the engagement

Step 2 is where learning begins. [Figure 6.4](#) consists of six sub-steps and identifies six of the key learning activities described in Part A of this chapter. Trainees are involved in learning acquisition (off the job) in a workshop

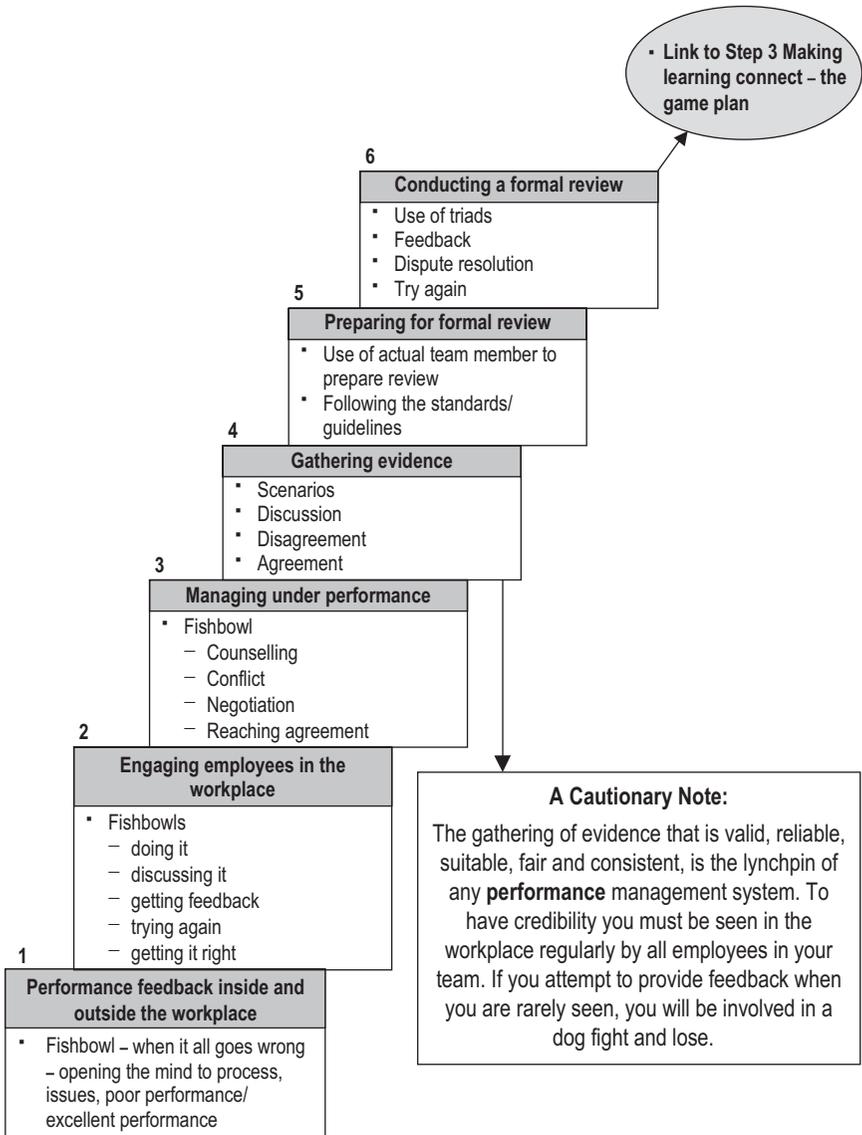


Figure 6.4 Step 2 – Making learning work – the engagement

setting. It also requires preparation for learning application on the job (in the real world where work takes place).

These learning activities must be skilfully managed by the trainer(s). There is no room for subjectivity. Connections between knowing and doing must be tightly controlled. Careful attention must be given to messages gleaned from the completed individual profile of each participant gathered prior to

commencing learning. Individual differences should be considered in preparation for providing feedback on performance.

The learning activities that occur are so real that often the personalities of participants may change when placed in challenging situations. It is imperative that trainers are prepared for the behaviours that might emerge when the challenges impact on individuals.

Sometimes these activities highlight individuals who should never have been appointed as line managers. On the other hand, these activities can reveal real success stories – coaches who just ‘take off’ at this point in learning.

One thing is certain. Never use trainers who are incapable of managing mood swings with either individuals or groups. Any trainer must be able to think quickly when responding to changes in individual and group behaviours, particularly during uncertain moments and phases. One of the great strengths of a trainer is debriefing learning activities. This skill must come to the fore during these six sub-steps. There is nothing more frustrating for learners than to be involved in an activity and then have it left to die without a clear strategy for application, without reaching conclusions and messages for professional practice.

A final word on this step. The trainer must practise what is preached about validity, reliability and fairness when making judgements about performance and behaviour during fishbowls and triads. Simply, there is a time to be nice and a time to be nasty – but you had better be right, convincing and professional, and be sure you are following specified and known criteria that are clearly communicated to all involved. There must be no surprises.

Step 3. Making learning connect – the game plan

It is important to repeat that each of the five major steps in the learning process is connected. From a learning point of view these connections continue the footprints for success. From a trainer’s point of view, Steps 3 and 4 are the most critical. Without tight management controls, the value of learning that occurred in Step 2 can be put at risk or even lost.

Step 3 is where the application of learning in the real world begins; see [Figure 6.5](#). Close scrutiny of each of the four sub-steps will show that each coach in training is now engaged in operating as a coach on a day-to-day basis, using the GIDAY approach during work activities and preparing to conduct a formal review (see [Chapters 3 and 4](#)).

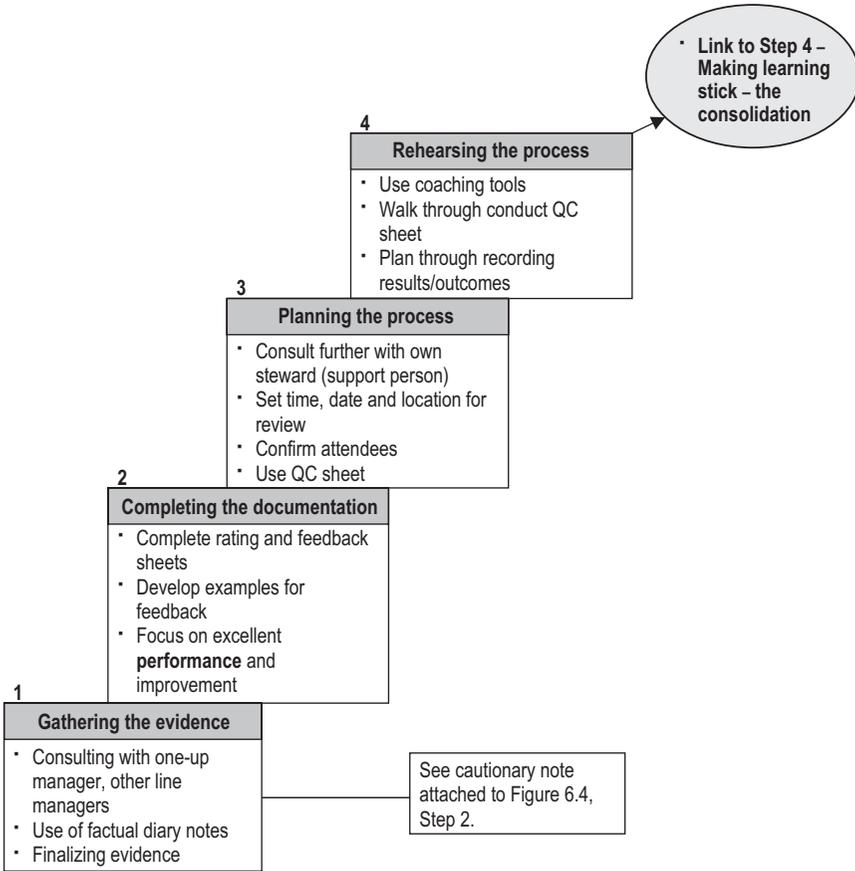


Figure 6.5 Step 3 – Making learning connect – the game plan

Continued support is of paramount importance. All of this support has been planned and committed to, set in concrete by senior managers and agreed to by all employees through the communication and consultation process (see [Chapters 1](#) and [2](#)). In organizations that have been successful in implementing our approach, the level of planning and commitment undertaken, promised and complied with, ensures Steps 3 and 4 survive and flourish.

From your own knowledge and experience you know that learning environments, away from the real world of work, should isolate participants from the day-to-day challenges of their job. However, the reality of returning to the job to apply learning whilst managing normal work activities provides a first class opportunity for learning to be sacrificed – ‘I’ll do that tomorrow’.

This step must be totally managed and facilitated by the trainers. It is where the commitment of management and the trainees is called upon. As trainers we let loose the reins of control to others to steward on the job performance; we referred to these people as ‘support persons’ in Part A of this chapter.

In some of the organizations where we have implemented our people management approach, these support people have been called ‘mentors’. In some instances they have been HR personnel; it depends on the size and structure of the organization. Irrespective of title, what these people are required to do must be totally clear. Each must be trained and given time to do what is required. We refer to this important role and work as an ‘immunization strategy’ to combat failure.

Our view is that this loosening of the reins *need not* happen, but really *should*. Costs will have a major bearing. For example, if external trainers are to manage the application of learning performance on the job, it will come at high cost. If the organization’s senior management decide to have their own learning facilitators/ managers steward the process, it will also come at a cost, because these people will need to be given time to do what is required.

The major considerations are embedding the learning successfully into the organization and ensuring that the people responsible are able to confidently manage the entire process in a sustainable way. Confidence is a can-do ethos. The most important thing is that the forecast outcomes are achieved and produce the results that will deliver real and sustainable benefits to all. It is the very reason the organization has introduced a people management approach.

Step 4. Making learning stick – the consolidation

Step 4 consists of five sub-steps; see [Figure 6.6](#). There is no more critical step than consolidation of learning. Whatever support/stewarding process is selected by the organization’s senior management, it becomes imperative to watch over the on the job activities and the individual behaviour of each coach under the pressures of doing it in the real world of work.

The trainers and trainees have spent hours preparing for the moment. Trainees have used a great deal of energy preparing themselves. Some may have fallen by the wayside, but those who remain are committed and primed to implement workplace coaching. The coaching principles must be complied with. The evidence collected in order to give feedback during a formal review must be valid, reliable, suitable and fair. There must be no surprises. All the operating performance standards and the code of conduct specified for a coach must be complied with.

The learning activities designed and implemented in Step 2 to prepare workplace coaches will have each coach confident. However, there is nothing like doing it in an environment which actually replicates the living

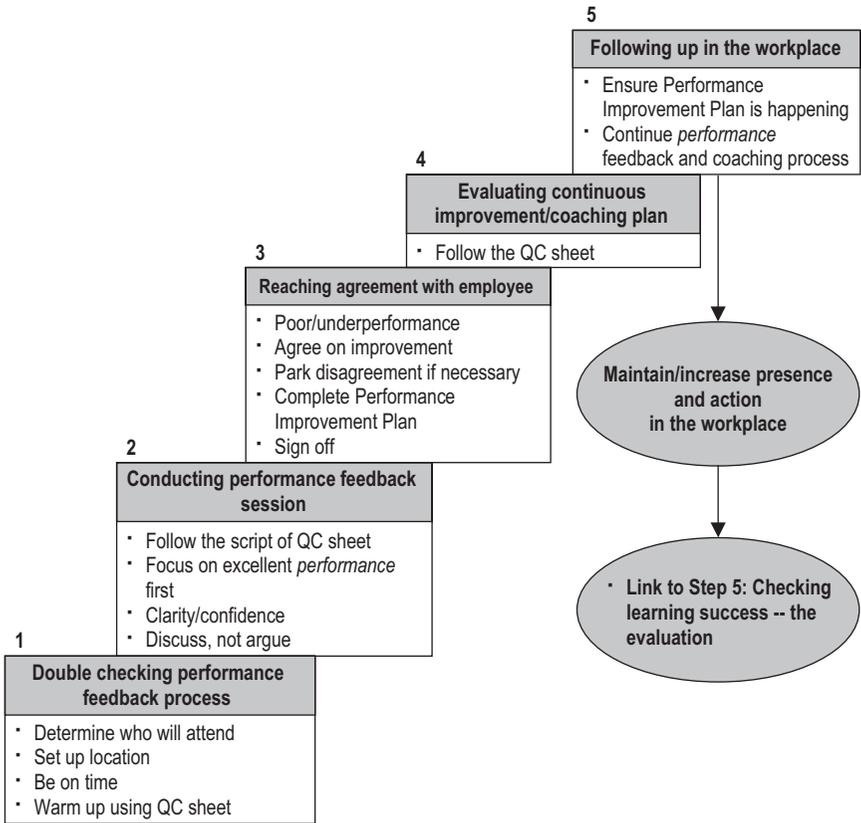


Figure 6.6 Step 4 – Making learning stick – the consolidation

environment of work. The trainers have provided each coach with quality control (QC) sheets to follow whilst preparing for and conducting a formal review with an employee. These are to assist in practice and implementation; to maintain consistency/reliability with each employee; and to assist each coach to conduct the formal review with confidence.

At this point, the development of each employee and improving workplace performance, are the focus of the coach. Individual development plans are finalized and implemented. The employees are involved in having their performance and behaviour reported on. Excellent performance is acknowledged and underperformance becomes the blueprint for development and improvement.

As with any work activities based on expectations (standards and a code of conduct), compliance becomes a major activity. This requires the implementation of an evaluation that targets the critical success factors involved in the people management approach. This leads to the final step, Step 5.

Step 5. Checking learning success – the evaluation

This step consists of four sub-steps; see [Figure 6.7](#). In our experience most organizations have a reluctance to, lack of interest in, or are just ignorant of how important it is to evaluate the success of learning and training. Often any evaluation consists of ‘happy sheets’ that give some subjective feedback on matters to do with how well the trainees enjoyed a training programme.

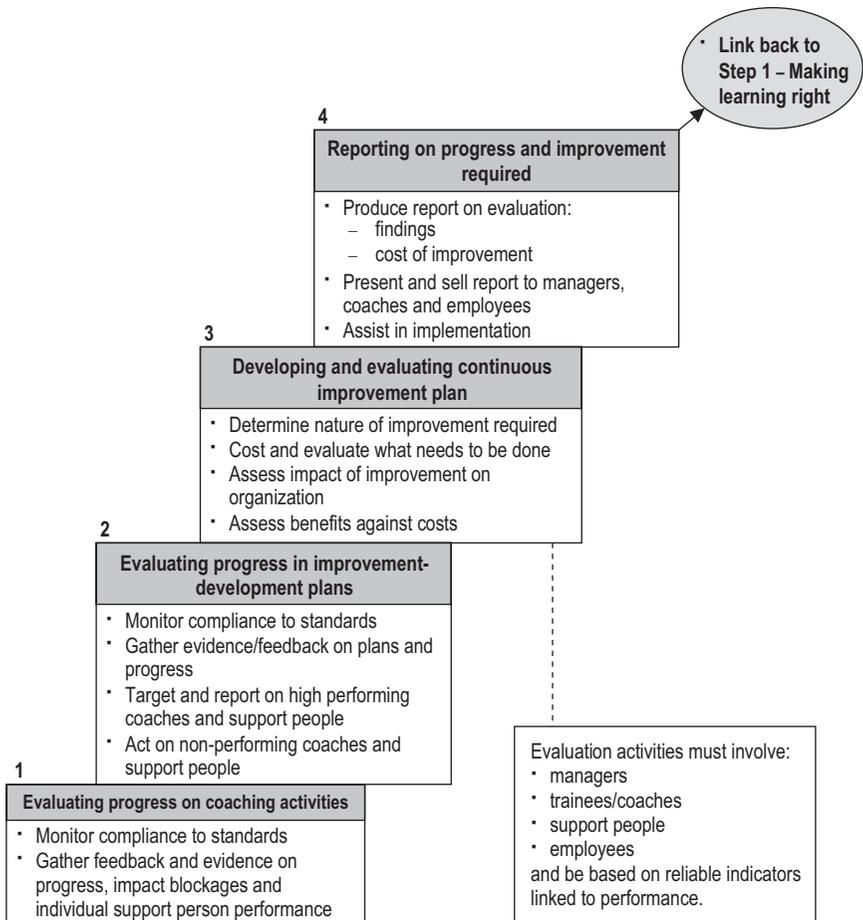


Figure 6.7 Step 5 – Checking learning success – the evaluation

This people management approach is designed to be a way of life. People management is an expensive investment that requires constant surveillance of activities and evidence-gathering on the extent to which the outcomes sought have been achieved, and on the extent to which all the activities and

standards have been complied with. It does not mean focusing on just learning and training. It involves all activities.

It requires the same approach as specified in the rigour set by international quality standards. There must be evidence of compliance and action to renew. The evaluation must involve:

- managers;
- trainees/coaches;
- trainers;
- support personnel;
- employees.

One of the key questions is, who should conduct the evaluation? We argue that it should be those who have introduced the people management approach, set it up and trained the line managers to be coaches. Whilst the on the job learning application may have been handed to internal support people, it is imperative to ensure that non-biased collection of evidence and hard hitting, honest feedback is provided. The financial investment by the organization ought to demand it.

This is not a chapter about evaluation as such. It is about obtaining evidence on the extent to which the organization's investment is having the desired impact. This means evidence of:

- coaches operating effectively inside and outside the workplace;
- effectiveness relating to the detection of underperformance in areas of competence and behaviour;
- stewarding (whatever name you choose), if used, providing the level of support required and that this support is having a real impact on the work of coaches;
- improvement plans being developed; that they are meeting individual and team learning needs and having a direct impact on improving the way work is done and employees are behaving to the code of conduct whilst doing their work;
- the cost of improvement being related to real monetary gains in the workplace, for example:
 - improved safety performance,
 - reduction in rework,
 - improved equipment reliability,

- reduction in absenteeism,
- reduction in customer returns,
- improved team/workplace morale,
- reduction in customer complaints.

These are only some of the indicators listed in sub-steps 1 to 4 of the evaluation. The important thing is that these should not become too cumbersome in number and are able to be monitored progressively during the entire introduction and operation of the people management approach.

Evaluation is not a one-off activity. Activities that make up evaluation should be informal and formal. Non-compliance must be targeted immediately and dealt with as it occurs. The formal evaluation should provide the evidence, activities and suggestions for continuous improvement. These are fed back into Step 1. Making learning right – the structure. So the process begins again with total confidence that the people management approach is working and getting better (continuously improving).

SUMMARY

Developing coaches for managing people is a considerable challenge. Be prepared for some surprises if you are involved in the process. You will find that a number of line managers may not be able to cope. It will ultimately become clear they were not the right people for the job anyway. Others will find the learning/training a challenge. This should be viewed as encouraging. Learning ought to be a challenge; it should be difficult in parts but it should also be enjoyable. To succeed at learning is a great step to further growth. ‘The sweet smell of success’ does wonders for ongoing development.

The learning process will change all those involved. Each participant will become more confident. Each will think more about the employees who work for them. Greater thought will be given to how to handle/manage team members; more important, how to get the best out of each and, in particular, how to develop each employee further by providing the competence and confidence required to perform, behave and enjoy work.

Those who are unable to cope will respond in a variety of ways. Some may leave, others will require discipline. Ultimately those under discipline may become the target for dismissal. These people will join those, if any, on the team who have reached a point when dismissal is the only solution. The next chapter takes up this critical process.

NOTES

1. Our experience is that just because some employees are known to be difficult on the job, it will not necessarily flow over to their behaviour during a formal review. On the contrary, if the people management system has been well sold, many of these 'difficult' employees respond with support and enthusiasm.
2. This model was suggested by Ian Gribble of the Office of Training and Further Education, Victoria, who called it a 'Training Transfer Model' involving the trainer, trainees and management.