

IC 9479
INFORMATION CIRCULAR/2005

Coaching Skills for On-the-Job Trainers

Information Circular 9479

Coaching Skills for On-the-Job Trainers

**By Launa G. Mallett, Ph.D., Kathleen Kowalski-Trakofler, Ph.D.,
Charles Vaught, Ph.D., CMSP, William J. Wiehagen, CMSP,
Robert H. Peters, and Peter Keating**

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Centers for Disease Control and Prevention
National Institute for Occupational Safety and Health
Pittsburgh Research Laboratory
Pittsburgh, PA

July 2005

ORDERING INFORMATION

Copies of National Institute for Occupational Safety and Health (NIOSH)
documents and information
about occupational safety and health are available from

NIOSH–Publications Dissemination
4676 Columbia Parkway
Cincinnati, OH 45226–1998

FAX: 513–533–8573
Telephone: 1–800–35–NIOSH
(1–800–356–4674)
E-mail: pubstaft@cdc.gov
Web site: www.cdc.gov/niosh

This document is the public domain and may be freely copied or reprinted.

Disclaimer: Mention of any company or product does not constitute endorsement by NIOSH.

COACHING SKILLS FOR ON-THE-JOB TRAINERS

Launa Mallett, Ph.D., Sociologist; Kathleen Kowalski-Trakofler, Ph.D., Psychologist; Charles Vaught, Ph.D., CMSP, Sociologist; William Wiehagen, CMSP, Industrial Engineer; Robert Peters, Psychologist, Pittsburgh Research Laboratory, National Institute for Occupational Safety and Health, Pittsburgh, PA

and

Peter Keating, Senior Training Coordinator, Pennsylvania Services Corporation, Waynesburg, PA

Sections:

- ◆ Guide to Developing a Coaching-Based On-the-Job Training Program
- ◆ Guide to Conducting a Coaching Skills Workshop for On-the-Job Training
- ◆ Instructor's Notes
- ◆ Workshop Slides
- ◆ Pre-workshop Reading and Participant Workbook

GUIDE TO DEVELOPING A COACHING-BASED ON-THE-JOB TRAINING PROGRAM

On-the-job training is a common means of training or retraining workers and the practice may seem simple and straightforward. Doing it effectively however requires more thought and preparation than simply having someone follow an experienced worker around and watch what they're doing.

Over the years, various techniques and practices have evolved that pass on the skills and knowledge of a trainer or coach in a manner that leads an inexperienced trainee to really absorb the information being taught. On-the-job training thus becomes less a haphazard show-and-tell and more a real transfer of information.

The goal of this document is to describe how to develop or manage an on-the-job training program so that information is passed on from trainer/coach to trainee efficiently and effectively. By efficient is meant the best use of time and resources of all those involved in the training process, and by effective is meant that the trainee truly learns the skills and internalizes the knowledge needed to perform the job well.

The first part of the document discusses topics to think about when developing a formal on-the-job training program. A structure based on coaching is suggested. Then a workshop designed to prepare trainers as coaches is described. Workshop materials include an instructor's guide and trainee workbook. These materials can be used to train coaches and to assist trainees as they go through the learning process. Content related to specific jobs can be added to these materials to create targeted on-the-job-training manuals.

Structuring a formal on-the-job training program

It is likely that some form of on-the-job training (OJT) is being conducted at your workplace. The formality of that training can range from a structured program to an informal "follow Joe around" method. If your program is completely unstructured, it may not be meeting current training needs. Worse, it may perpetuate bad habits and create "trained" employees who are not given the same information or evaluated to the same standards. Wiehagen et al. comment that, "Success in using unplanned OJT is usually dependent on the luck of the draw, that is, whether the informal trainer is competent at the task he or she is teaching, is motivated to teach, can organize the job into logical components, and knows something about good practices in teaching and evaluating" (2002, p. 27).

It is only through planning a structured OJT program that consistency can be created and maintained. At the least, all trainees who have successfully completed such a program can be expected to perform at an established level—they will know what they must do to be successful.

**On-the-Job Training Program Objective:
Given assigned resources, prepare inexperienced employees
to perform selected jobs to company standards.**

To establish a structured program, parameters must be set regarding issues such as who will conduct the training, what material will be covered, and how long training will last. In addition, the following topics should be considered. Each will be discussed in more detail in this guide.

- ❑ Selecting and preparing OJT trainers/coaches
- ❑ Working with supervisors for successful implementation
- ❑ Developing and/or selecting training materials
- ❑ Setting trainee prerequisites
- ❑ Evaluating performance
- ❑ Granting company certification to trainers/coaches and trainees
- ❑ Evaluating the program

This guide was developed to provide tips and advice for setting up an OJT program. It is based on education and training research. More in-depth information about past research on OJT training can be found in the references.

A coaching-based on-the-job training program

A lot has been written about setting up OJT programs. This guide presents some of the best ideas from many sources and brings them together in one strategy. It is based on a philosophy of OJT trainer as coach.

The coaching-based OJT program strategy is based on a few simple ideas:

- ❖ **A successful OJT program is created in a team environment.**
- ❖ **A champion in the company is needed to administer the program.**
- ❖ **Supervisors are assigned to oversee the training needs of each trainee. (Note: They do not necessarily conduct any training.)**
- ❖ **OJT trainers use coaching skills as they direct the learning process. Every OJT coach is given specialized training on teaching and coaching skills.**
- ❖ **OJT is conducted based on standardized methods for each job or task.**
- ❖ **Management has to create a positive attitude about coaching.**

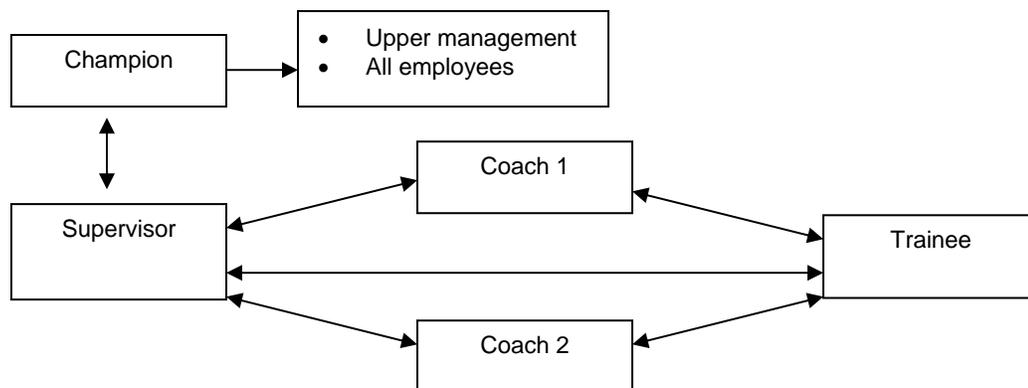
The key members of the OJT team are—

- **A Champion.** A champion is an individual who actively promotes the program in the company. The champion is a strong believer in the benefits of the coaching-based OJT program and, in essence, sells it to upper management and

enthusiastically supports its integration into the company. He or she administers and evaluates the overall program.

- **The Supervisor.** The supervisor manages the action part of the program and is the *person responsible for overseeing the progress of the trainee*. The supervisor—
 - ❑ *Selects the coaches* and provides on-going support for them.
 - ❑ *Determines the training plan for assigned trainees* by identifying the knowledge and skills to be acquired and providing standardized task training materials to the coach.
 - ❑ *Pairs trainees* with an appropriate coach or coaches.
 - ❑ *Evaluates the trainee's proficiency* and signs off when training is complete.
 - ❑ *Assesses the coach's skill* in transferring knowledge and skills to the trainee.
 - ❑ *Initiates follow-up* for each trainee.
- **The Coach.** The coach does the training. He/she is responsible for organizing and planning the training, developing a relationship with the trainee, and teaching knowledge and skills to the trainee.
- **The Trainee.** The trainee is responsible for being an interactive learner, developing a relationship with the coach, and mastering the material taught.

The primary work team in the coaching-based OJT program is the trainee, the supervisor assigned to oversee his or her training, and the coach or coaches who conduct that training. The diagram shows how primary interactions related to the program are expected to progress in a formal program.



The relationship between the coach and the trainee is defined in either a written or verbal agreement. Both individuals understand and are committed to the goals, actions, and timeline of the process and understand their respective roles and responsibilities.

Working with supervisors for successful implementation

Supervisors play a key role in this OJT program. They select and review coaches. For each trainee assigned to them, they develop a plan with the knowledge and skills needed by that individual in mind. They match trainees to coaches to accomplish the goals set forth in the plans. It is the supervisor's responsibility to conduct an official evaluation to determine when trainees have achieved an acceptable level of performance.

Since OTJ is, by definition, taking place at a worksite, even supervisors who are not currently assigned trainees need to understand the importance of quality training and know how to support coaches and trainees. All supervisors should know any legal requirements and company policies requiring employee training before certain tasks can be performed. Training-related paperwork, even if it is to be completed by another supervisor or a coach, should be explained to all supervisors so they can review it if they ever have a question about the training status of any employee who reports to them.

OJT coaches can not be expected to fulfill their original duties at the same level of involvement while they are engaged in training activities. During that time, part of their job is to teach, not to produce. Supervisors need to understand how this short-term loss will be a long-term gain for the company through increasing the skills of new employees. New employees will become productive more quickly with effective training.

A difficult situation may be created if the new employee will not report to the coach's supervisor. In these cases, it is particularly important that a supervisor believes a training-related slowdown will not have negative ramifications. Supervisors should be positively reinforced for supporting training that will contribute to overall organizational goals.

Supervisors will be overseeing the OJT worksite. They should communicate their support to OJT coaches and trainees and explain the importance of the program to their other workers. If an OJT program is being formalized for the first time, employees who were trained in less formal ways may not see why a change is needed. If other employees see training as a slowdown or something that negatively impacts their work, they may become resentful. If the supervisor is aware that this can happen, he or she is more likely to recognize developing situations and deal with them before problems become difficult. Regardless of the type of training being provided, supervisors have to manage new employees and employees who are new to given tasks. An effective OJT program will make this part of a supervisor's job easier.

Selecting and preparing coaches

The foundation of the program is its coaches. Coaches must know and be able to perform the jobs they are teaching and also know how to share their knowledge and skills with a novice. Choosing the right people to be coaches and then giving them the support they need is key to a successful program.

A coach "is someone who helps someone else (a trainee) learn something that he or she would have learned less well, more slowly or not at all if left alone." (Chip R. Bell)

Although no one seems to question how important technical expertise is for the OJT trainer, possessing a high level of expertise can actually hinder one's ability to effectively share his or her knowledge with a trainee (Johnson and Leach, 2001, p. 426).

OJT trainers are often chosen on the basis of their job experience. However, experts may not be the most effective teachers because they no longer need to think through each step of each task to do the job. Instead, they think of the work in chunks or patterns that they have come to recognize or define during hours of practice. Therefore, they may leave out critical information when explaining a task to a novice who needs to have every step

clearly explained. While an OJT coach should be competent in the job for which a trainee is being instructed, the person with the most expertise is not always the best choice.

A person currently in the position is usually chosen as the trainer, and that person is generally expected to teach all aspects of the job. However, a supervisor should consider whether another employee could (or even should) teach some things to those new to a given job. For example, a mechanic who understands how a machine functions could teach equipment operators. The mechanic might be in the best position to explain how to do proper inspections and to advise the new operator about what should be done to keep the machine in good working order. In addition, using other coaches for parts of a trainee's experience can lessen the workload on one coach and give a trainee different perspectives on new tasks.

Job expertise shouldn't be the only consideration when selecting a coach. Personal characteristics are also important. James Leach (1996) reports that successful trainers will have "enthusiasm, humor, flexibility, and tolerance." In discussions between coal miners and NIOSH staff about what makes a good trainer, the characteristic of patience was brought up often. Miners also said excellent trainers care about their trainees. It will be these kinds of *qualitative* differences that will set excellent coaches apart from adequate ones.

Some of the characteristics that make a good coach are (Leach, 1996)—

Responsiveness	Expresses interest in trainee, is a good listener, has good communication skills, accommodates individual differences, maintains relaxed manner, is receptive to questions.
Enthusiasm	Is energetic, optimistic, prepared, willing to commit time.
Humor	Able to incorporate humor in personal and real-life examples during training.
Sincerity/honesty	Takes every question seriously and doesn't pretend to know the answer if they don't.
Flexibility	Able to eliminate, adjust, or alter material during training according to trainees' needs and/or time constraints.
Tolerance	Able to accommodate different personalities and learning styles; accepts constructive criticism and doesn't take it personally.

In addition to expertise and personal characteristics, he or she must also know *how* to coach. Often this requirement is overlooked in OJT programs. While selected employees may become great OJT coaches by trial-and-error, they will become effective more quickly if given assistance in learning and mastering teaching skills. One way to do this is through 1-day workshops that incorporate adult education principles and allow teaching/coaching skills to be practiced. (Materials for such workshops are provided later in this guide.)

Although OJT trainers may have highly developed skills in their area of expertise, they are likely to have little awareness of the procedures and strategies that will make them effective trainers (Johnson and Leach, 2001, p. 427; see also Williams, 2001).

Employees selected as OJT coaches should be told what is expected of them and what they will get in return for taking on this role. Teaching can be intrinsically rewarding, but it can also be stressful. Since the OJT coach is a productive employee, he or she may feel pressured to continue producing at the same rate even when activities are being added to a workday. It is not possible for the individual to do both things at the same time with 100% efficiency and attentiveness. The production rate for the OJT coach will decrease when they are training, and they should be reassured that the coaching job is important and worth spending time to do well. It is likely, however, that OJT coaches will continue to be productive employees in terms of their original jobs as well as in their new roles. It is appropriate that they be given recognition and/or rewards for their extra efforts. In an effective OJT program, coaches know they are respected and appreciated.

One way to reward coaches is to institute an OJT coach certification. Certification would identify individuals who have been selected and prepared to conduct training. Preparation would include the content of the given job along with teaching and assessment skills. If the organization certifies employees as coaches, then training is less likely to become a “follow Joe around” experience. Once certified, however, the individual must be offered resources and support to be successful. They should also be given opportunities to improve their skills through additional education or refresher sessions. Another advantage to certification programs is that supervisors will know a certified OJT coach is qualified to prepare an inexperienced employee for a new task.

Trainees' role in on-the-job training programs

Trainees' responsibility in the relationship

Trainees must be *active* participants in a coaching-based OJT program. They need to understand the importance of coaching and how it will benefit them. For the trainee-coach relationship to succeed, the trainee must be ready to learn, open to communicating honestly, and respectful of his or her assigned coach. Trainees who commit to the relationship and see training as an opportunity to increase their skills will be most successful. Supervisors should communicate trainee roles to each of them before training starts.

Setting trainee prerequisites

Some level of basic knowledge, and sometimes skill, is required before learning any new job. The prerequisites to the job should be determined and documented as part of the OJT program. Formalizing the prerequisites will give everyone an understanding of what is minimally expected of someone new to a given job. Trainers will be provided with a starting point, and trainees feel more confident knowing they have met certain standards. If trainees do not meet the prerequisites, what additional knowledge or skills they need before OJT begins will be clear.

Evaluating trainee performance

It is important to have some system in place to determine whether trainees have gained the knowledge and skills required to do the new job. Such a system should be thorough enough to gauge trainee success accurately, but not too cumbersome to use with ease. One method is to design checklists including each important task and/or subtask that should be reviewed. Checklists can be compiled while training content is being defined. It can be used as a guide to key points to be made during training, as well as an evaluation tool as training progresses.

One caution when setting up an evaluation system is that coaches and trainees must not think that "fully successful" is the only acceptable level of task performance. If that becomes the norm, trainers are likely to conduct an evaluation only when they are sure this goal will be met. A successful evaluation system allows trainees to learn from less-than-perfect performances and progress to eventual success in each task or subtask.

Supervisors should evaluate the performance of trainees and have final sign-off responsibility. Successful training cannot take place, however, without the coach assessing performance either formally or informally as training progresses. Additional people who might evaluate trainees are other employees who have expertise in the job for which workers are being trained or safety department employees. However, no matter who evaluates trainees, the same method should be used each time. Trainees should always know who will be evaluating their performance and what knowledge and/or tasks will be reviewed.

Granting company certifications to trainees

Certification can be a means of identifying employees with given knowledge and skills. Certification is useful when a quick assessment of people who can do certain tasks is needed. If a company certification system is put in place, however, a decision must be made as to whether individuals currently in the job will be certified or whether those individuals should be evaluated in the same manner as new workers who are taking specific training.

If a certification program is put into place, then OJT coaches should become certified before teaching others. Coaches then have the experience of going through an evaluation from a trainee's perspective and a chance to become familiar with the training process. In addition, certifying OJT coaches demonstrates to trainees that the coaches have proven their abilities in the job being taught.

Developing and/or selecting training materials

Teaching guides give coaches and trainees road maps for activities. Guides also increase the consistency of training between different OJT coaches and document what is being taught. The guides should be selected and/or developed with the input of OJT coaches, supervisors, maintenance personal, and safety professionals (or representatives) and tested to confirm they are appropriate for a specific workplace. "To keep things simple, [the] trainer [coach] and trainee guides should be, for the most part, identical. They should both list all of the tasks addressed by the structured OJT program" (Blair, 2001).

While the basic information in coach and trainee guides should be the same, some different information should be added to each one.

An additional item I recommend including for each task in the trainer [coach] guide is a statement, or paragraph, listing areas to cover, or stress, when teaching the task. This is also a good place for any other task-related suggestions you might want to add. Corresponding items can also be placed in the trainee's guide to help them concentrate on the same salient points as the trainer (Blair, 2001).

The job is not over when the training material has been developed or selected and is in use. Periodic review will ensure that the guides still match the organization's training needs. Coaches, trainees, and supervisors should be asked to report their suggestions for changes or updates to the guides. If they individually make changes, their ideas will not be shared with other company OJT coaches. The result will be inconsistent training across the organization. Training guides also need to reflect changes in equipment, procedures, regulations, and policies.

Evaluating the program

Evaluation should be integrated into the program as it is designed and implemented. No matter how confident anyone is in the program, some form of ongoing review is needed to confirm what is going well, what is not going well, and what improvements can be made. The evaluation process does not have to be costly or formal, but it should be comprehensive. The table shows some types of information that can be included in a program evaluation.

Focus	Type of Evaluation
The program	<ul style="list-style-type: none"> ▪ Overview conducted by program champion
Supervisors	<ul style="list-style-type: none"> ▪ Self-assessment ▪ Champion review ▪ Trainee assessment
Coaches	<ul style="list-style-type: none"> ▪ Self-assessment ▪ Supervisor review ▪ Trainee assessment
Trainees	<ul style="list-style-type: none"> ▪ Pre-assessment ▪ Self-assessment ▪ Trainer progress reviews ▪ Supervisor sign-off evaluation ▪ Follow-up review

Everyone with knowledge about the program and a stake in its success should be included in the review to some extent. Key sources of information about how the program is working include trainees, coaches, supervisors, and employees working with individuals who have completed the training. The simplest technique is to talk informally to people about the program. More formal methods, such as questionnaires or group interviews, are also worthwhile, but depend on the resources of the program and the importance of the skills being taught.

Even when a program is evaluated and found to be highly successful, it should continue to be reviewed over time. New people become trainers, new supervisors are hired, and the subject matter itself can evolve as changes take place in the work environment and/or the worksite. Thus, training materials and processes should be reassessed and revised periodically so the OJT program continues to be successful.

Summary

A coaching-based OTJ program requires commitment from all levels of the organization—trainees must be open to learning; coaches must be interested in teaching and trained to do it well; supervisors must coordinate and review the activities of their assigned trainees and the coaches working with them; and all managers must support the goals and methods of the program.

Each program will improve over time. Today's trainees will learn about coaching relationships and be trained using methods that adhere to adult learning principles. These employees will have a head start when it is their turn to take on the roles of supervisor and coach in the future.

References

- Blair, P. (2001). Tips- Structured OJT, <http://pages.prodigy.net/pblair/intro.htm>, Pete Blaire and Associates.
- Johnson, S. D., and Leach. J.A. (2001). Using Expert Employees to Train on the Job, Ch. 3 in *Advances in Developing Human Resources* 3(4), pp. 425-434.
- Leach, J.A. (1996). Distinguishing Characteristics Among Exemplary Trainers in Business and Industry, in *Journal of Vocational and Technical Education* 12(2), pp. 7-11.
- Wiehagen, B., Conrad, D., Friend, T., and Rethi, L. (2002). Considerations in Training On-the-Job Trainers, in *Strategies for Improving Miners' Training*, Robert Peters (editor), NIOSH Information Circular 9463, U.S. Department of Health and Human Services, Center for Disease Control and Prevention, National Institute of Occupational Safety and Health, pp. 27-34.
- Williams, S.W. (2001). The Effectiveness of Subject Matter Experts as Technical Trainer, *Human Resources Development Quarterly* 12(1), pp. 91-97.

GUIDE TO CONDUCTING A COACHING SKILLS WORKSHOP FOR ON-THE-JOB TRAINING

The goal of this workshop is to teach experienced miners how to be effective at passing on what they know to miners new to their jobs. It gives prospective OJT trainers the rationale and tools needed to become effective coaches and an opportunity to learn and practice strategies for successful coaching. By the end of the workshop, trainers will have a clearer understanding of their role, know how to prepare for teaching someone a new job, and know where to get needed resources.

Objectives

Instructional objectives are the cornerstone of successful instruction. When written well, they enable you to identify appropriate content for your instruction, organize your instruction the best way possible, and create tools to accurately determine if instruction is achieving your goals (Mager, 1997).¹

.....

Once upon a time a Sea Horse gathered up his seven pieces of eight and cantered out to find his fortune. Before he had traveled very far he met an Eel, who said,

"Psst. Hey bud. Where ya goin'?" "I am going out to find my fortune," replied the Sea Horse, proudly.

"You're in luck," said the Eel. "For four pieces of eight you can have this speedy flipper, then you'll be able to get there a lot faster."

"Gee, that's swell," said the Sea Horse and paid the money, put on the flipper, and slithered off at twice the speed. Soon he came upon a Sponge, who said,

"Psst. Hey bud. Where ya goin'?" "I am going out to find my fortune," replied the Sea Horse.

"You're in luck," said the Sponge. "For a small fee I will let you have this jet-propelled scooter so that you will be able to travel a lot faster."

So the Sea Horse bought the scooter with his remaining money and went zooming through the sea five times as fast. Soon he came upon a Shark, who said,

"Psst. Hey bud. Where ya goin'?" "I am going out to find my fortune," replied the Sea Horse.

"You're in luck. If you take this short cut," said the Shark, pointing to his open mouth, "you'll save yourself a lot of time."

"Gee, thanks," said the Sea Horse. He zoomed off into the interior of the Shark and was never heard from again.

The moral of this fable is that if you're not sure where you're going, you're liable to end up some place else.¹

.....

¹ Recommended reference: Mager, Robert F. (1997) *Preparing Instructional Objectives: A Critical Tool in the Development of Effective Instruction*, 3rd ed. Atlanta, GA: CEP Press.

Good instructional objectives describe the *learner's performance*—what the participant will be able *to do* at the end of the instruction. Performance outcomes identified in the objectives should be *observable* and *measurable*.

Coaching Program Objective: The workshop participant will be able to coach an employee during training. Success will be measured by management acceptance or approval of the OJT progress review as signed by the coach. The review stipulates that the employee is ready for duty.

Unit Objectives: At the conclusion of this workshop, the participants will be able to—

Unit I

- Self-assess their individual readiness for coaching as measured by completion of the coaching readiness self-assessment and
- Articulate the definition and characteristics of a coach as measured by the ability to name three qualities of a “super” coach and three deficiencies of a “blooper” coach.

Unit II

- Demonstrate an understanding of the coach/trainee relationship as measured by an ability to discuss the “three Cs” (communication, collaboration, and commitment) that make up a coaching relationship,
- Demonstrate good communication skills (specifically good listening skills, good questioning skills, and knowledge of appropriate feedback) as measured by (1) the translation of closed-ended questions into open-ended ones and (2) completion of the communication skills summary, and
- Describe, in classroom participation, the role of coach, trainee, supervisor, and company.

Unit III

- Demonstrate an understanding of how adults learn as measured by completion of the "Adult Learners" activity,
- Demonstrate an understanding of effective coaching as measured by completion of the "Effective Coaching" activity,
- Demonstrate, through classroom participation, an understanding of effective assessment in the learning process, and
- Demonstrate, through classroom participation, a familiarity with how to complete a coaching checklist.

Unit IV

- Demonstrate the ability to prepare a training outline by completing all parts of the "Preparing a Training Outline" activity.

Unit V

- Demonstrate skill in using the principles of adult learning in a class exercise through participation in the "Practice Coaching" activity, and
- Demonstrate coaching skills in classroom role playing to be measured by use of the OJT observer form.

Unit VI

- Evaluate the training through discussion during the review of the day and by completing the coaching skills workshop evaluation.

Field tests and technical reviews show that participants are likely to ask questions that have no clear-cut answers. For example, they may ask what to do about trainees who aren't really interested in being trained. This question and others like it can't be given set answers because trainee selection methods and other program details vary by organization. Time should be allowed during the workshop to discuss these concerns, with due consideration of the context in which the coaching will take place. Other topics, such as motivation, interest, abilities, and attitude, should be open to discussion during the workshop.

Workshop Topics

The agenda below lists suggested topics and recommended times for a 1 day workshop.

Topic	Time
Welcome and Introductions	20 minutes
Unit 1: What is a Coach? <ul style="list-style-type: none"> ▪ Successful Coaching ▪ Coaching Readiness Self-Assessment ▪ Characteristics of a Good Coach ▪ WIFM 	40 minutes
Unit 2: The Coach/Trainee Relationship <ul style="list-style-type: none"> ▪ Establishing a Relationship ▪ Effective Communication ▪ Responsibilities 	50 minutes
Unit 3: Coaching Adults <ul style="list-style-type: none"> ▪ Characteristics of Adult Learners ▪ Experience and Learning ▪ Effective Coaching ▪ Effective Assessment ▪ Coaching Checklist ▪ Steps to Successful Coaching 	50 minutes
Unit 4: Preparing a Training Outline	1 hour
Unit 5: Coaching Practice <ul style="list-style-type: none"> ▪ Practice Coaching Activity ▪ Coaching to Different Skill Levels Activity 	2 hours
Unit 6: Wrap-up <ul style="list-style-type: none"> ▪ Review of the Day ▪ Workshop Wrap-up ▪ On-the-Job Coaching Session Preparation ▪ Your Next Steps ▪ Coaching Readiness Self-Assessment ▪ Workshop Expectations ▪ Coaching Skills Workshop Evaluation 	1 hour

Preclass Preparation

The workshop can be conducted in any classroom or conference room with adequate space for participants to break into small groups. Seating should allow class discussion and small group activities. A projector is useful to show slides. Flip charts may also be helpful during class discussions and small group activities. Each trainee should be given a trainee workbook to use during the workshop and to take as a reference.

A downloadable version of the slide presentation designed for this workshop can be found on the NIOSH Mining Website (<http://www.cdc.gov/niosh/mining/>) by searching for this guide by title, author, or Information Circular Report number.

Items on the following checklist should be taken care of before each session.

- Date/time set
- Room scheduled
- Equipment available (projector, computer, flip-charts, other _____)
- Materials (preclass reading, workbook, extra forms for activities, slides)
- Participants notified of date, time, and location of workshop
- Preclass reading material distributed to participants
- Managers/supervisors notified about workshop as needed
- Food/drink arrangements made
- Upper-level manager prepared to give opening remarks.

If possible, the article “On Teaching and Learning: An Important Distinction in My Learning to Fly” by George Semb (see Student Workbook) should be distributed to participants before the workshop. If this is not practical, then copies of the article should be handed out as trainees arrive, and they should be given time to read it before the workshop starts.

An upper-level manager should give brief opening remarks. He or she can welcome the group and explain why the company or organization supports the training. A suggested outline is given on the next page to help the manager prepare his or her remarks.

Workshop Evaluation

It is very important to obtain feedback about the effectiveness of the workshop. At the end of each workshop, the instructor(s) should carefully review participants’ evaluations (included in the trainee workbook) and make changes to the class as needed. Later on, after participants have begun practicing their coaching skills on the job, it is important to obtain additional feedback. Ideally the feedback should come from the coaches, the employees they are training, and the supervisors of these employees

Suggested key points for manager's introduction:

Good Morning! Welcome to company name **Coaching Skills Workshop**

Company name continually searches for ways to improve our operational and safety performance. In our pursuit of the right mix of processes and programs, we have learned some things that have influenced our training and management philosophy: We might call these *universal leanings*. Let's review them and how they apply to today's **Coaching Skills Workshop**. This will help you understand the importance of what you are doing today.

1. Although there is a role for classroom training, some of the most effective learning is done on the job.
 - ❑ Adults are more likely to remember information they get through personal experience than information they get from lectures.
 - ❑ For adults, the best learning situation is interactive. They would rather be mentored (coached) than lectured to.
 - ❑ Employees in training want to know *how* what they learn will be applied to the work-place
2. The way we as a company coach and develop employees affects our productivity, our safety, and our ability to work well together. Consequently, it affects overall job satisfaction.
3. Learning that is based on participation is most effective and long-lasting. This, as you will soon experience, is the major advantage of coaching. A good job coaching results in a productive and safe employee, benefiting everyone.

Perhaps you should consider the following as you begin learning to be an effective coach: Coaching, in the words of Sir John Whitmore, is the process of **“Unlocking a person's potential to maximize their own performance.”**

I appreciate your participation in this workshop and trust that you will leave here equipped to help us achieve high levels of performance. I think you will find this workshop both rewarding and enjoyable as *you* are *coached* into becoming an *effective* coach.

Field Tests

The Coaching Skills for On-the-Job Training workshop was field tested in the fall of 2004 at two locations. The first workshop (field test group 1) consisted of 11 participants who were employees at a salt mine in the southeastern United States. The 14 participants at the second field test (field test group 2) worked at four stone quarry operations in Pennsylvania. Two NIOSH researchers taught the classes.

Participants in field test 2 were primarily responsible for safety, health, and training at quarries in Pennsylvania. The class was conducted in a training room equipped with a

Microsoft Power Point² projection system. Tables were arranged in a U-shape so everyone could see each other and the projection screen. The workshop started at 7:15 am and lasted 7-1/2 hours. There were three 10- to 15-minute breaks in the morning, a 40-minute lunch break, and one break in the afternoon.

An additional researcher was present during field test 2 to take notes. Details from these notes are included in the instructor's guide. Information such as how long activities lasted and topics on which participants needed additional explanation are discussed along with describing the activity or material to be presented.

Workshop Evaluation Form Responses

Twenty-three participants completed workshop evaluation forms. Eleven were from group 1, and 12 were from group 2.

Job titles included loading foreman; mechanic; forklift operator; ac pan operator; screen plant operator; driller; training specialist; various safety, training, health, and/or environmental specialists; Euclid driver; and hammer operator.

All but one participant had at least 2 years of experience in the mining industry. Mining experience of the participants ranged from 6 months to 35 years. Sixteen of the 23 participants indicated that they had prior experience conducting on-the-job training.

The tables below indicate how many participants chose each of four possible responses to the listed evaluation questions.

1. How **relevant** was the training for you?

<u>Group 1</u>	<u>Group 2</u>	
10	7	Very relevant
1	5	Somewhat relevant
0	0	Mostly irrelevant
0	0	Totally irrelevant

2. How **easy** was the training to follow?

<u>Group 1</u>	<u>Group 2</u>	
8	6	Very easy
3	5	Somewhat easy
0	1	Difficult
0	0	Too difficult

² Mention of specific products or manufacturers does not constitute endorsement by the National Institute for Occupational Safety and Health.

3. How would you describe the **quality** of the training materials?

<u>Group 1</u>	<u>Group 2</u>	
8	4	Excellent
3	4	Good
0	4	Average
0	0	Poor

4. How do you rate the **delivery** of the training?

<u>Group 1</u>	<u>Group 2</u>	
8	5	Excellent
3	7	Good
0	0	Average
0	0	Poor

Participants were also asked to write responses to a few open-ended questions. A brief summary is given below.

- All participants from both groups said that **they would recommend this course to others**.
- Several participants said that **the most important thing they learned from the workshop** was the importance of preparing a training outline and how to go about it. Other responses included establishing a good coach-trainee relationship; assessing the trainee's level of experience and what they already know at the beginning of the training session; communication skills; spending enough time in the coaching phase; realizing each person needs to be trained in a different manner; what to expect from trainees; the importance of gaining the trainee's trust and confidence.
- When asked **what they would suggest changing about the workshop**, the responses included to have more props available for use in the small group training exercises; provide more group exercises; have each group do a different activity; use additional scenarios; make sure that the material in the workbook corresponds to the information on the Power Point slides; add the graph illustrating how on-the-job training relates to the amount of time it takes trainees to attain an acceptable level of proficiency at a new task to the workbook (i.e., OJT shortens the learning curve).
- When asked **what they would keep (not change) about the workshop**, responses included the importance of clearly communicating to trainees what the trainer/company expects of them; the importance of preparing a good training outline, trainee evaluation; the notion that being able to perform a job well does not mean a person is necessarily going to be a good coach; giving participants the opportunity to discuss each section; role playing; preparing a coaching checklist.

Overall, participants' comments were quite favorable. The workshop was considered to be very useful, and participant thanked the presenters for offering it to them.

Instructor's Notes for Coaching Skills Workshop for On-the-Job Training

Consider these notes suggestions and use them as a starting point from which to tailor the workshop to individual class needs.

Welcome and Introductions

This section sets the stage for the workshop. Make introductions and describe the plans for the session.

Start with the manager's opening remarks. Be sure trainees understand why the workshop is being offered.

Tell the class that the trainee workbooks are theirs to keep. They should make notes they think might help them right in the books.

Coaching Skills Workshop for
On-the-Job Training

Slide 1

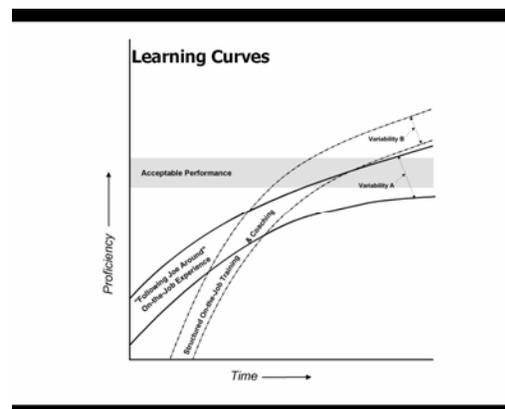
Lead a brief discussion about training and learning at the worksite. Refer to the **pre-reading article** ("On Teaching and Learning: An Important Distinction in My Learning to Fly" by George Semb) and trainee experiences.

Have trainees write what they expect to get from this workshop on **page ii**. Discussing expectations will let you know what trainees are thinking about the workshop and will give you an opportunity to correct any misconceptions they may have. You can also define what will and will not be covered.

Ask trainees to complete the OJT Coaching Pre-assessment on **page iii**. Have them fill out the form for *this workshop* on Coaching. Explain that they should think about coaching broadly. For example, in question 2 include experiences in the community (soccer coach, Little League, Boy Scouts, volunteer organization leadership, fraternal organizations such as Elks, VFW, church activities, parenting) and any other experiences they have had teaching someone to do something. One goal of this activity is to increase confidence by showing that most all adults have some sort of "coaching" experience.

NOTES:

Point out that it can take workers a long time to learn new tasks by trial and error. It is often possible to significantly reduce this time by providing structured On-the-Job Training. This graph illustrates how structured jobsite training accelerates the learning curve. Not only does it accelerate learning, it often reduces risks and costly mistakes that can result in serious injury, production downtime, or increased levels of maintenance. Variability in the performance of critical tasks can compromise performance. Structured OJT, coupled with effective coaching, reduces the variability in workers' performance of critical tasks, and moves them well beyond minimum levels of acceptable job performance.



Slide 2

When workers learn new tasks by trial and error or the “Following Joe Around” methods, one can expect them to make more errors and to take longer to achieve an acceptable level of performance. Workers who are taught by an effective program of structured OJT coupled with good coaching can be expected to learn more quickly, and to exhibit less variability in task performance. This latter approach to training requires small time investments in the short run. However, the long run benefits are often well worth this initial investment—especially in relatively hazardous or unforgiving work environments such as mining.

The graph above and related information was taken from the following document.

Wiehagen, B., Conrad, D., Friend, T., and Rethi, L. (2002). Considerations in Training On-the-Job Trainers, in *Strategies for Improving Miners' Training*, Robert Peters (editor), NIOSH Information Circular 9463, U.S. Department of Health and Human Services, Center for Disease Control and Prevention, National Institute of Occupational Safety and Health, pp. 27-34.

NOTES:

Unit 1: What is a Coach?

This section defines a coach and explains why learning coaching skills is important for someone conducting OJT.

Discuss their technical expertise and how they will be better able to share their knowledge and skills after they participate in this workshop.

Emphasize that practicing their coaching skills after the workshop will help them improve as OJT trainers.

NOTES:

Unit 1: What is a Coach?

- Successful Coaching
- Coaching Readiness Self-Assessment
- Characteristics of a Good Coach
- WIIFM?

Slide 3

Successful Coaching

It takes more than being able to do the job well.



The ability to share knowledge and skill effectively can be learned and practiced.

Slide 4

Use Coach Holtz's words to kick off a discussion about ability as only the starting point for being able to do a job well.

Good coaches are motivators and instill good attitudes in their trainees.

From One Coach to Another

"Ability is what you're capable of doing."

"Motivation determines what you can do."

"Attitude determines how well you do it."

- Lou Holtz, former Head Coach, University of South Carolina

Fun Facts:

Slide 5

Under the leadership of Coach Lou Holtz, the University of South Carolina football program achieved a high level of success and respect. In Coach Holtz's first five-years, USC accomplished several firsts in the program's 110-year history, including the following.

- Winning two consecutive New Year's Day Bowl games (2001, 2002 Outback Bowls)
- Finishing with top 20 national rankings for two straight years (19th in 2000 and 13th in 2001)
- Ranked in the national polls for an entire season (2001)
- The most victories in consecutive seasons (17 from 2000-01)
- Record-setting home attendance (82,614 average in 2001 and 82,138 in 2002)
- Most national television appearances in a three-year period (18)
- Most players (11) to sign NFL contracts in one season (2002 and again in 2003)

Ask trainees to complete the form on **Unit 1 – Page 5**. These forms are for self-assessment.

"Once in a while you have to take a break and visit yourself." Audrey Giorgi

When everyone is finished, go to the next slide to discuss the form.

Coaching Readiness

The self-assessment determines

- Your strengths.
- Things you can work on to improve your success as a coach.

Slide 6

NOTES:

Refer trainees to **Unit 1 – Pages 7 & 8** for this discussion.

Point out that each box on Page 7 is related to the questions in the corresponding box on the form they just completed on Page 5.

Characteristics of a Good Coach

Responsiveness
 Enthusiasm
 Flexibility
 Commitment
 Tolerance
 Desire
 Humor
 Sincerity/Honesty

Slide 7

This activity can be started individually or in small groups. Have the groups (or individuals) complete the form on **Unit 1 – Page 9**.

Bring the class back together to discuss the positive and negative characteristics the trainees have recognized in their past coaches.

You may want to put the positive list on a flip chart and hang it on the wall for later reference.

Super Coach
 or
 Blooper Coach
 Activity

Slide 8

Have each trainee write an answer to the question on **Unit 1 – Page 11**.

Some examples are: improving the skills of my work team; learning ways to teach my children new skills; gaining respect in the organization.

Facilitate a discussion of what the workshop participants can gain from becoming OJT coaches.

WIIFM?
 What's In It For Me?

Slide 9

Summarize this unit by defining a coach and reviewing characteristics of a good coach.

A Coach...

"is someone who helps someone else (a trainee) learn something that he or she would have learned less well, more slowly or not at all if left alone."

(Chip Bell)

Slide 10

NOTES:

Unit 2: The Coach/Trainee Relationship

A coach must create a learning environment for the trainee. This section discusses the relationship needed between coach and trainee.

Establishing a relationship is the first step in the process of coaching. See **Unit 2 – Page 3** for discussion of the three C's.

Techniques to establish the three C's:
Listening, Observing, Questioning, Rephrasing

NOTES:

Unit 2: How Adults Learn

- Establishing a Relationship
- Effective Communication
 - Listening Skills
 - Asking Good Questions
 - Giving Feedback
 - Communication Skills Summary
- Responsibilities

Slide 11

Establishing a Relationship



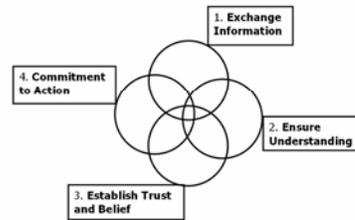
Slide 12

Communication needs to move through four stages: the Communication Process Model shown on **Unit 2 – Page 5**. Sometimes the process goes quickly and at other times it is slow and deliberate.

See discussion questions on Unit 2 – Page 5.

Step 1: Exchanging information leads us to want to know if our message was received and understood. Therefore, we move to the next step in the process.

Effective Communication



Slide 13

Step 2: Ensuring understanding. There are techniques you can use to determine if the listener not only received your message but understands the message and its intent. Some of these are discussed later in this section.

Step 3: Establish Trust and Belief. The listener must not only understand what is said, but also believe it.

Step 4: Commitment to Action. Often, in the communication process, all that we have to go on is the listener's statement of what they will do. That is why it is called a commitment to action and not just an action. We have to listen for the commitment. If it is not forthcoming you may need to probe to find out why.

Discussion Point: What happens if the listener understands, but doesn't trust or believe that what was said is reasonable or the right thing to do?

Understanding does not always come easily. It is the result of skill and effort.

Communication is an exchange between two parties. In teaching, emphasis needs to be placed on trying to see each point from the learner's point of view instead of only trying to make him or her see things your way.

Listening Skills

"Seek first to understand,
then to be understood."

Stephen Covey (1990)
The 7 Habits of Highly Effective People



Slide 14

This is another quote from Covey. Ask trainees what they think Covey means by psychological air.

The answers will be varied. This discussion will lead to a short comment on validation on the next slide.

val·i·date

to make legally valid **b** : to grant official sanction to by marking **c** : to confirm the validity of (an election); *also* : to declare (a person) elected

2 : to support or corroborate on a sound or authoritative basis <experiments designed to *validate* the hypothesis> **synonym** see CONFIRM (Webster's Dictionary)

Listening engages the heart of a person. Engage the heart and you can then engage the mind.

Problem Solving begins with listening.

Review good listener skills on **Unit 2 – Page 7**.

Nonverbal behavior is important to note. One study found 93 percent of a message is sent non-verbally, with only 7 percent through what is actually said.

Have trainees write down some forms of nonverbal communication. Example: frequent eye contact communicates interest and confidence.

Next to physical survival,

“the greatest need of a human being is psychological survival--to be understood, to be affirmed, to be validated, to be appreciated. Listening provides this ...for it provides 'psychological air'.”

Stephen Covey

Slide 15

When you listen carefully to another person you validate them.

Once the need for validation is met, others are open to listen to you. It is then you can focus on influencing them or solving problems.

Slide 16

Good Listeners:

- **Don't interrupt or plan a response while the other person is talking**
- **Are not judgmental**
- **Think before answering**
- **Try to face the speaker; maintain eye contact**
- **Watch nonverbal behavior; listen with eyes and ears**
- **Ask questions and wait for an answer**
- **Don't have to have the last word**

adapted from Richard Gemmet 1977

Slide 17

Have trainees think about themselves in social setting approaching someone they know. Ask them how often their conversation begins with a question.

Lead a discussion about why this is so. (starts an exchange of information, shows interest, captures interest, etc.)

Tell the class there are two types of questions. Ask them if they know the difference between a closed-ended and an open-ended question.

Closed-ended - short/set answers

Open-ended - more detailed/varied response

Both are useful in certain situations.

Define closed-ended questions.

Have trainees write answers to question on **Unit 2 – Page 8**. Lead discussion of their answers.

Quickly call on participants and have them ask you a question starting with the key words do, is, can, etc. Move from person to person quickly.

Asking Good Questions

??

- Gets the trainee and coach talking
- Controls attention because they require a response
- Helps the learner think

??

Slide 18

Types of Questions

- Closed-ended
- Open-ended



Slide 19

Closed-Ended Questions

- Usually result in a yes or no answer
- Usually begin with
Do..., Is..., Can..., Could..., Would..., Should...,
Will..., Shall...,
- Should be avoided
- Example:
"Are you ready to move to the next step?"

Slide 20

Continue having participants ask questions now using the key words how..., why..., etc. (answer briefly, but not with yes/no answers) Discuss how these questions force more information than the closed-end ones.

Open-ended questions help a coach collect information about the learner's background, experience, and progress.

Have trainees write answers to question on **Unit 2 – Page 9**. Lead discussion of their answers.

Have trainees work in groups of two for the activity on Unit 2 – Page 11.

Have some of the groups report their new questions and lead a brief discussion on why the new questions would be better in a coaching environment.

As coaches, the skillful use of feedback to learners is important in letting them know how they are doing, answering questions, and dealing with their concerns.

Discuss the tips for giving constructive feedback listed on **Unit 2 – Page 12**.

Open-Ended Questions

- Help evaluate trainee's understanding
- Establish strengths and concerns of the trainee
- Begin with
How..., Why..., When..., Where..., What..., Who..., Which..., If...
- Example:
"What additional information do you need in order to move to the next step?"

Slide 21

Translate Closed-Ended Questions to Open-Ended Questions Activity

Slide 22

Giving Feedback

The purpose of feedback is

- To reinforce corrections
- To point out actions that need to be corrected through further practice

Slide 23

Explain there are different types of feedback that coaches can learn to use. (**Unit 2 – Page 13**)

Discuss what is meant by the term **sincere** praise?

Restate the trainee's original statement in more specific terms. Example, "What I hear you saying is...."

Give a specific example or restate what was said in general terms.

When you restate you do not clarify what the other person means, but what it means to you.

Tell the class that there are times when they will be asked questions that they know should be answered by the trainee. They shouldn't be afraid to bounce it back to them.

Caution them not to throw all questions back to the trainee, but to evaluate each one to determine the benefits of redirecting it.

Feedback Techniques

- **Praise**
 - Let trainees know how well they are doing
 - Use sincere praise to create a more constructive atmosphere

Slide 24

Feedback Techniques

- **Clarifying**
 1. Restate what you heard the trainee say
 2. Listen for confirmation that what you are saying is correct
 3. Encourage trainees to tell you if you are right or wrong

Slide 25

Feedback Techniques

- **Boomerang Question**
 - Redirect a question back to the learner
 - Example: "That's a good question. What do you think ought to be done in that situation?"

Slide 26

Review the importance of giving feedback.

Introduce the idea of giving feedback at the right time and place.

Explain that feedbacks can be learned and can improve with practice.

Explain that there are different levels of feedback that can be useful in different situations. Review related information on **Unit 2 – Page 14**.

Break the class into small groups to review the communication skills discussed in this section. Have them answer the question on **Unit 2 – Page 15**.

Have the groups report their answers to the class. Answer any questions related to communication skills.

Giving Feedback

Effective coaches:

- Give plenty of timely positive feedback
- Give negative feedback privately
- Accept criticism without becoming defensive

Slide 27

Informal versus Formal Feedback

Informal Feedback
– Given as issues arise

Formal Feedback
– Given at specified times

Slide 28

Communications Skills Summary

Slide 29

End this section by explaining that a coach will use communication skills to fulfill a number of responsibilities.

Discuss the responsibilities of the coach listed on **Unit 2 – Page 17**.

Responsibilities

- Coach's responsibilities include
 - Assessing trainee knowledge and skills
 - Organizing and planning training
 - Developing relationship with the trainee
 - Teaching knowledge and skills
 - Evaluating progress
 - Suggesting changes needed to the program



Slide 30

Each coach must interact with a team which includes trainees and managers/supervisors for a successful OJT program to function.

Discuss the responsibilities of the supervisor, and trainee listed on **Unit 2 – Page 17**.

Responsibilities

- Coach's responsibilities
- Supervisor's responsibilities
- Trainee responsibilities

An OJT coach is part of a team.

Slide 31

NOTES:

Unit 3: Coaching Adults

Adults learn differently from children. Research has taught us some characteristics of adult learning.

This section covers ways to teach and assess adults.

Unit 3: Coaching Adults

- Characteristics of Adult Learners
 - Experience and Learning
 - Effective Coaching
 - Effective Assessment
 - Coaching Checklist
 - Steps to Successful Coaching
-

Slide 32

Discuss the characteristics on Unit 3 – **Page 2**.

Adults respond best to learning that is active and **experienced-based**. They like learning they can relate to on the basis of their own experiences. Unlike children, adults are experts in their own right in specific areas. This expertise needs to be recognized and may be used to meet the learning goal.

Adults are real-life centered and desire **practical** problems, example, and descriptions from real life.

Characteristics of Adult Learners



Slide 33

Adult learners are task-centered and **problem-centered**. They are quick to focus on a problem and so are solution-driven.

Adults have personal training **goals**. They may be skill-seeking and in training to acquire a new job skill. Sometimes an adult will be motivated by the pleasure and satisfaction of learning something new or by camaraderie of interaction. Other times an adult will be motivated by the resultant increase in pay or certification at the end of the class. Knowing a trainee's motivation will help in coaching that individual.

Adults are independent, **self-directed** learners. Methods should be used to guide the trainee to learn in a way and at a pace comfortable for him or her.

Give trainees time to do the activity on **Unit 3 – Page 3.**

Examples:

Self-directed: allow trainees to say when they are ready for an assessment of their skills

Experience-based: use examples from a trainee's off-the-job interests like sports

Practical: ask the trainees questions about applying new information to a specific task

Problem-centered: explain at what point during a work process a new skill would be used

Goal-oriented: ask the trainee his/her career goals and discuss how this training fits

Adult Learners Activity

Slide 34

Discuss the graphic on **Unit 3 – Page 5.**

Basically, more is remembered when training is active and closer to the actual task being trained.

Simply telling the trainee what to do is much less effective than involving them in the learning process.

Cone of Learning



Slide 35

Discuss the tips presented on **Unit 3 – Page 6.**

Coaching is a planned process. While it may be more or less formal and structured, it does not happen effectively without thought going into how it will be done.

Effective Coaching

- Clear Goals
- Valid Content
- Appropriate Delivery Method
- Assessment
- Remediation



Slide 36

Break the class into small groups for the activity on **Unit 3 – Page 7**. Let each group select their own topic. Caution groups to keep it simple.

Example: helping daughter pass written driver's licensing test

Goals: pass the written driver's test

Content: the state driver's study book

Delivery: reading and discussion

Assessment: practice tests and the state administered exam

Remediation: discussion of materials related to questions missed

Evaluation must be part of an effective coaching program. The formality and structure of assessment varies across programs.

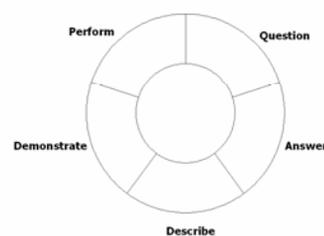
Lead a class discussion of the answers to the questions on **Unit 3 – Page 9**.

A job aid for coaches is provided on **Unit 3 – Pages 11 through 14**. Go through the suggested behaviors and guidelines with the class.

Effective Coaching Activity

Slide 37

Effective Assessment



Slide 38

Coaching Checklist

Job aid to use

- As you are preparing to coach
- While you are coaching
- For self-evaluation

Slide 39

Summarize this section by discussing the coaching process using the four-step model given on **Unit 3 – Page 15**.

Steps to Successful Coaching

1. **Focus**

THEN

2. **Explain and Demonstrate**

3. **Observe**

4. **Feedback**



Slide 40

NOTES:

Unit 4: Preparing a Training Outline

A training outline helps a coach to cover all the key points when teaching and assessing.

If all coaches at a workplace teach from the same outline, then everyone new to a task will learn to do it the same way. This makes working together later easier.

For this section have the class divide into small activity groups of 3 to 5 members. Review the scenario on **Unit 4 – Page 3**.

Give the groups 10-15 minutes for Part I as described on **Unit 4 – Page 5**.

Emphasize this is a brainstorming activity and they should not worry about the order of the steps.

Have groups report their lists to the class. Are all the lists the same? Groups may update their lists after hearing other lists.

NOTES:

Unit 4: Preparing a Training Outline

- A training outline is a set of instructions and considerations that help you teach.
- The purpose of a training outline is to help you teach the task.



Slide 41

Preparing a Training Outline Activity – Part I

Job Steps



Slide 42

Have each small group take 20 minutes to order their steps as explained on **Unit 4 – Page 6**.

Tell the class the goal is to put the steps in the order they would want to use to teach the task. Groups should use the form on **Unit 4 – Page 7** to document the steps.

Have each team report their outline to the class. Groups can revise their outlines as others report.

Preparing a Training Outline Activity – Part II

Group and Order Steps



Slide 43

During the discussion of this activity reinforce the need for preparing a training outline.

A practical training outline:

- ◆ Makes sense to experience workers
- ◆ Is a natural way of thinking about the job
- ◆ Is useful for chunking the job into parts that can be taught and evaluated
- ◆ Is at a level of detail that is useful for the trainee and the trainer

Have the small groups continue filling out their teaching outline on the form from Unit 4 – Page 7 by adding important teaching points as explained on **Unit 4 – Page 9**.

After this part of the activity, each group should have a teaching outline for the task of changing a tire. Summarize by discussing what participants found easy/difficult about creating the outline.

Preparing a Training Outline Activity – Part III

Important Considerations



Slide 44

NOTES:

Unit 5: Coaching Practice

This unit gives participants a chance to practice using coaching skills. They will develop a short training outline and use it to teach the skill to another participant.

The class should be broken into small groups of 3 people each.

Directions for this activity are on **Unit 5 – Page 3**. Go over the directions and each of the assessment forms (Unit 5 – Pages 7 through 13).

Provide a list of jobs from which the groups can choose. Examples: setting up an extension ladder, using a fire extinguisher, taking gas readings, installing a fence, baking cookies.

You may want to have props available related to the jobs. Give the groups about 1 hour before bringing the class back together to discuss their experiences as coaches/trainees/observers.

Instructions for this activity are on Unit 5 – Page 15. The goal is to emphasize that not all trainees start at the same level of knowledge and experience and the coach should assess each trainee to determine the appropriate starting point and level for training.

This activity depends on your skill at role-play. Be sure to vary “your” level of expertise with the different coaches and to show how the form on Unit 5 – Page 16 can be used to plan training.

Unit 5: Coaching Practice



Slide 45

Practice Coaching Activity

Use your skills

- Create a teaching outline
- Take turns as coach, trainee, and observer

Slide 46

Coaching to Different Skill Levels Activity

Match your coaching to the trainee

- Assess the trainee's knowledge and skill
- Adjust your teaching to that level



Slide 47

Unit 6: Wrap-up

This unit is a workshop summary and an opportunity to let participants know what kind of organizational support they can expect as coaches.

Unit 6: Wrap-up

Reviewing the Day Looking to the Future

Slide 48

Unit 6 – Page 3 is a copy of the day's agenda.

Lead a brief discussion of each major topic. Have a few participants tell one important concept from each unit and/or one new thing they learned that will improve their OJT sessions.

Review of the Day

- What Is a Coach?
- The Coach/Trainee Relationship
- Coaching Adults
- Preparing a Training Outline
- Coaching Practice

Slide 49

Remind participants that this workshop is just a step in learning/improving coaching skills. Now they will have to practice.

Be prepared to give participants a name they can contact after the workshop to ask questions or discuss coaching-related issues and sources of additional information about coaching.

Have participants write down these sources of support on **Unit 6 – Page 4**.

Coaching Support Contacts and Resources

Slide 50

Encourage participants to use the job-aid on **Unit 6 – Page 5** when preparing for an OJT session.

Refer them to the **Appendix** for additional copies of the various forms (job-aids) they have practiced using in this workshop. The first page explains each form. Tell participants which, if any, of the forms will be used as official documentation of the OJT program.

Emphasize the notion that coaching skills are learned and improved over time. Have each trainee list on **Unit 6 – Page 6** some things he or she plans to do after the workshop to improve his or her coaching skills.

Examples: read about coaching, observe other coaches, practice by teaching a new skill to my son, ask for feedback about my communication skills from someone I have taught in the past

Have each participant complete the self-assessment on **Unit 6 – Page 7**. Ask them not to look at the one they filled out at the start of the workshop until they have finished.

When everyone has completed the form and compared it with the form they filled out at the start of the workshop, ask them if their answers changed and if so why.

Suggest participants may want to use this form again in a few months to re-assess their skills.

OJT Coaching Session Preparation

- Employee scheduled for training
- Teaching materials developed and available
- Job tools and equipment available and on site
- Training materials reviewed and job skills practiced
- Required forms/documents on hand



Slide 51

Your Next Steps



Slide 52

Coaching Readiness

- The self-assessment determines
- Your strengths
 - Things you can work on to improve your success as a coach

Slide 53

These last two slides are ways to assess the success of the workshop. Ask participants to review the expectations that they expressed at the start of the workshop and then answer the questions on **Unit 6 – Page 9**.

Lead a class discussion of the answers. If important expectations were not met, discuss ways they could be covered outside of the workshop.

Ask trainees to complete the workshop evaluation on **Unit 6 – Page 11** and turn it in so the information can be used to improve future workshops.

Workshop Expectations

Slide 54

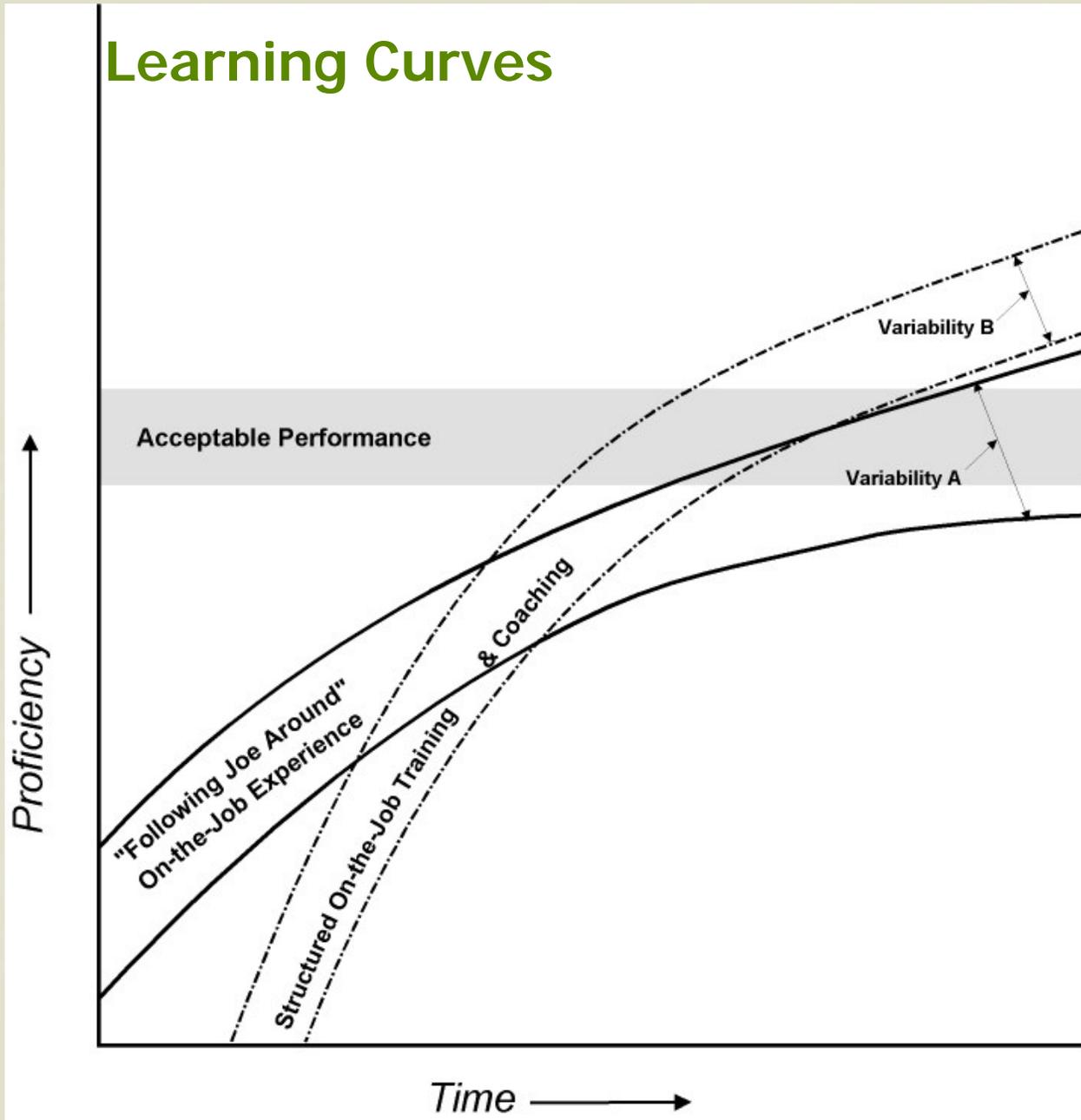
Coaching Skills Workshop Evaluation



Slide 55

Coaching Skills Workshop for On-the-Job Training

Learning Curves



Unit 1: What is a Coach?

- Successful Coaching
- Coaching Readiness Self-Assessment
- Characteristics of a Good Coach
- WIIFM?

Successful Coaching

It takes more than being able to do the job well.



The ability to share knowledge and skill effectively can be learned and practiced.

From One Coach to Another

“Ability is what you're capable of doing.”

“Motivation determines what you can do.”

“Attitude determines how well you do it.”

- Lou Holtz, former Head Coach, University of South Carolina

Coaching Readiness

The self-assessment determines

- Your strengths.
- Things you can work on to improve your success as a coach.

Characteristics of a Good Coach

Responsiveness

Flexibility

Desire

Enthusiasm

Humor

Commitment

Tolerance

Sincerity/Honesty

Super Coach
or
Blooper Coach
Activity

WIIIFM?

What's In It For Me?

A Coach...

“is someone who helps someone else (a trainee) learn something that he or she would have learned less well, more slowly or not at all if left alone.”

(Chip Bell)

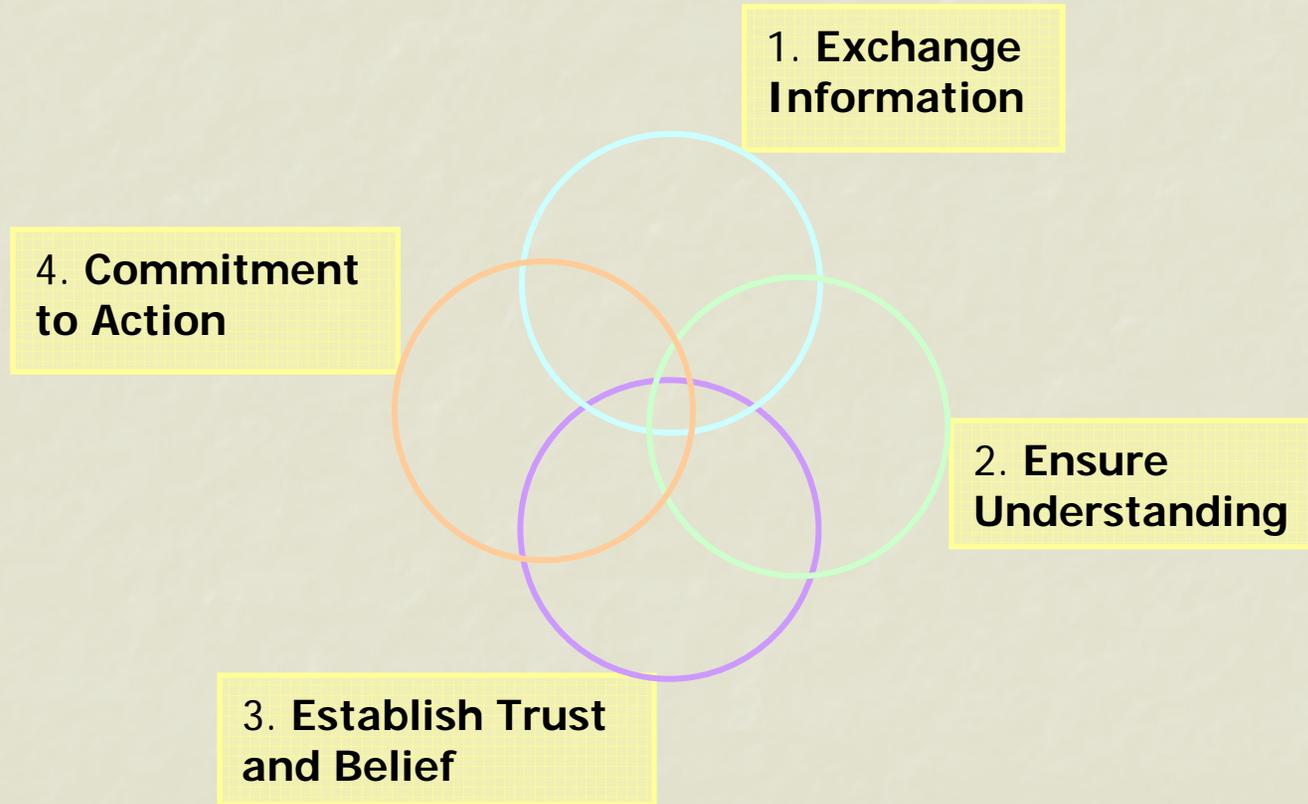
Unit 2: How Adults Learn

- Establishing a Relationship
- Effective Communication
 - Listening Skills
 - Asking Good Questions
 - Giving Feedback
 - Communication Skills Summary
- Responsibilities

Establishing a Relationship

Communication
Collaboration
Commitment

Effective Communication



Listening Skills

“Seek first to understand,
then to be understood.”

Stephen Covey (1990)
The 7 Habits of Highly Effective People



Next to physical survival,

“the greatest need of a human being is psychological survival--to be understood, to be affirmed, to be validated, to be appreciated. Listening provides this ...for it provides ‘psychological air’.”

Stephen Covey

When you listen carefully to another person you validate them.

Once the need for validation is met, others are open to listen to you. It is then you can focus on influencing them or solving problems.

Good Listeners:

- **Don't interrupt or plan a response while the other person is talking**
- **Are not judgmental**
- **Think before answering**
- **Try to face the speaker; maintain eye contact**
- **Watch nonverbal behavior; listen with eyes and ears**
- **Ask questions and wait for an answer**
- **Don't have to have the last word**

adapted from Richard Gemmet 1977

Asking Good Questions

??

- Gets the trainee and coach talking
- Controls attention because they require a response
- Helps the learner think

??

Types of Questions

- Closed-ended
- Open-ended



Closed-Ended Questions

- Usually result in a yes or no answer
- Usually begin with
Do..., Is..., Can..., Could..., Would..., Should...,
Will..., Shall...,
- Should be avoided
- Example:
"Are you ready to move to the next step?"

Open-Ended Questions

- Help evaluate trainee's understanding
- Establish strengths and concerns of the trainee
- Begin with
 - How..., Why..., When..., Where..., What..., Who..., Which..., If...
- Example:
 - "What additional information do you need in order to move to the next step?"

Translate Closed-Ended Questions to Open-Ended Questions Activity

Giving Feedback

The purpose of feedback is

- **To reinforce corrections**
- **To point out actions that need to be corrected through further practice**

Feedback Techniques

- **Praise**
 - Let trainees know how well they are doing
 - Use sincere praise to create a more constructive atmosphere

Feedback Techniques

■ **Clarifying**

1. Restate what you heard the trainee say
2. Listen for confirmation that what you are saying is correct
3. Encourage trainees to tell you if you are right or wrong

Feedback Techniques

- **Boomerang Question**
 - Redirect a question back to the learner
 - Example: "That's a good question. What do you think ought to be done in that situation?"

Giving Feedback

Effective coaches:

- Give plenty of timely positive feedback
- Give negative feedback privately
- Accept criticism without becoming defensive

Informal versus Formal Feedback

Informal Feedback

– **Given as issues arise**

Formal Feedback

– **Given at specified times**

Communications Skills Summary

Responsibilities

- Coach's responsibilities include
 - Assessing trainee knowledge and skills
 - Organizing and planning training
 - Developing relationship with the trainee
 - Teaching knowledge and skills
 - Evaluating progress
 - Suggesting changes needed to the program



Responsibilities

- Coach's responsibilities
- Supervisor's responsibilities
- Trainee responsibilities

An OJT coach is part of a team.

Unit 3: Coaching Adults

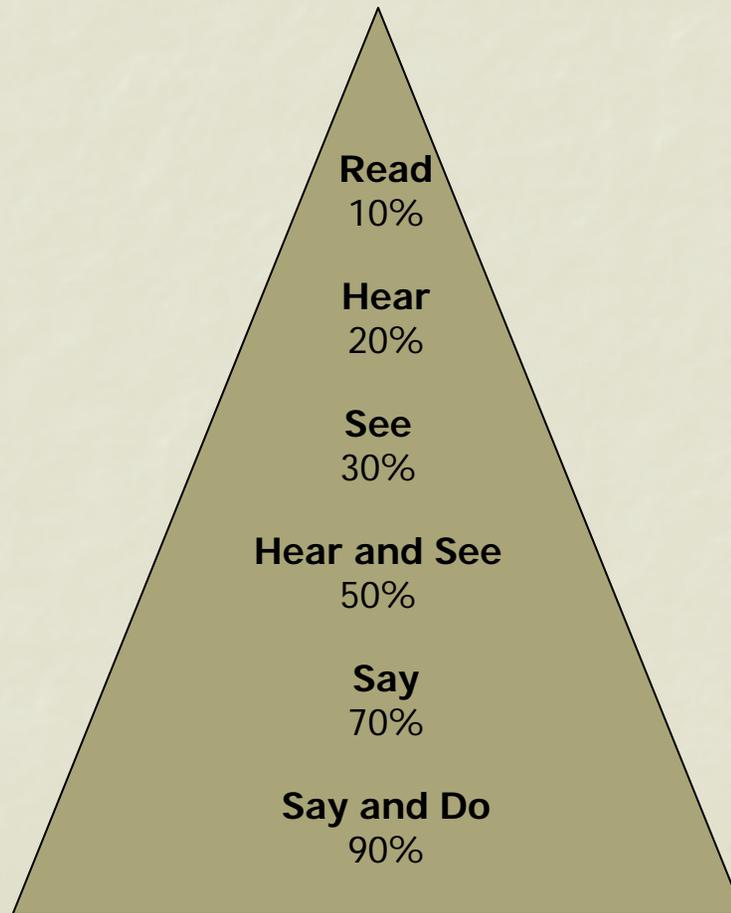
- Characteristics of Adult Learners
- Experience and Learning
- Effective Coaching
- Effective Assessment
- Coaching Checklist
- Steps to Successful Coaching

Characteristics of Adult Learners



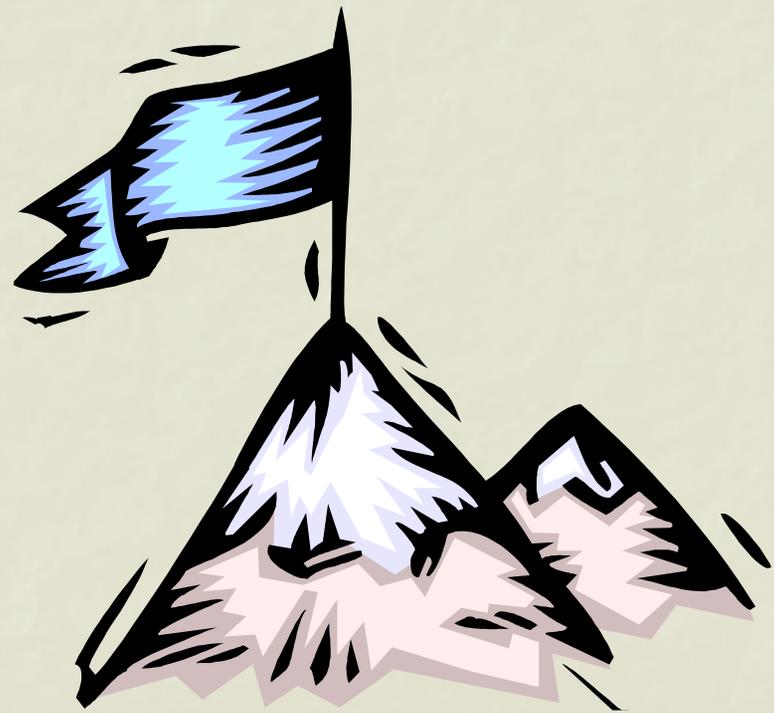
Adult Learners Activity

Cone of Learning



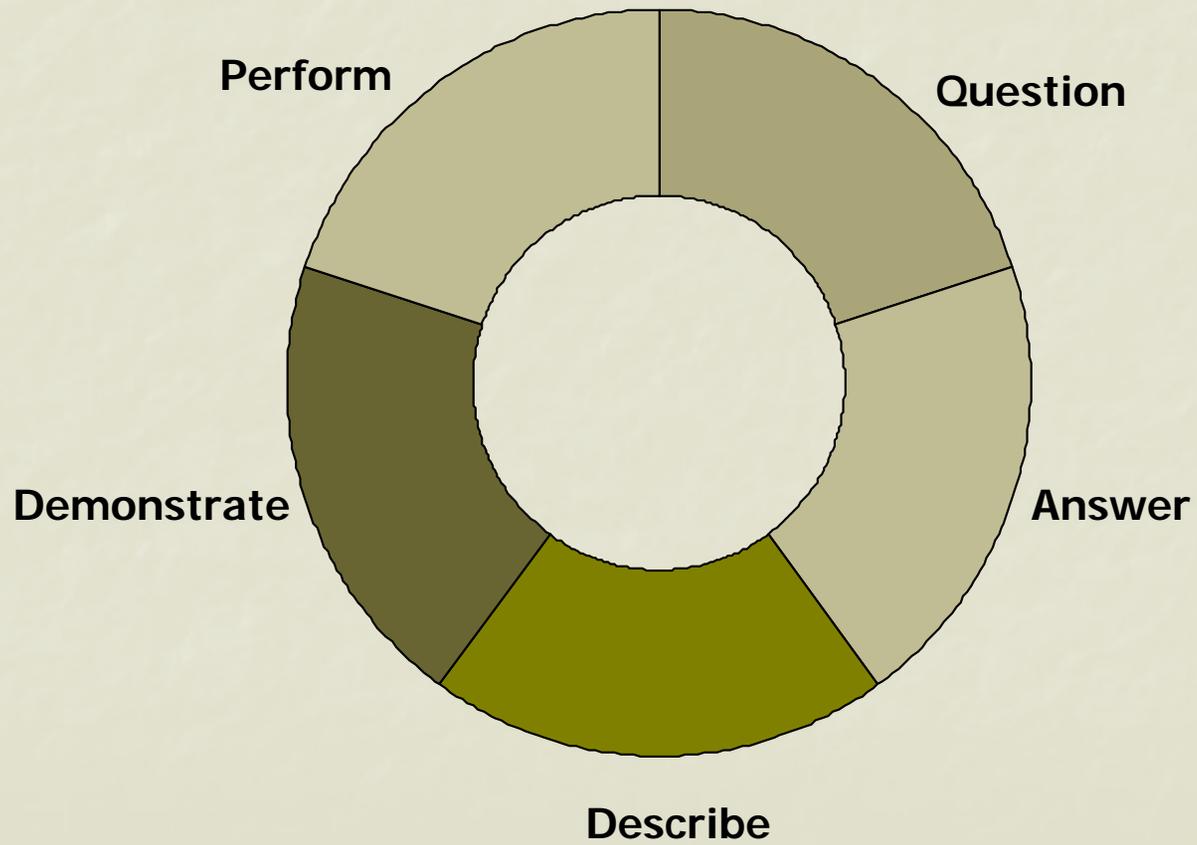
Effective Coaching

- Clear Goals
- Valid Content
- Appropriate Delivery Method
- Assessment
- Remediation



Effective Coaching Activity

Effective Assessment



Coaching Checklist

Job aid to use

- As you are preparing to coach
- While you are coaching
- For self-evaluation

Steps to Successful Coaching

1. Focus

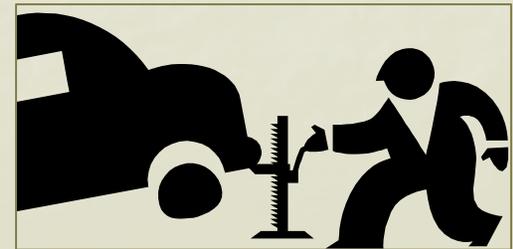
THEN

- 2. Explain and Demonstrate
- 3. Observe
- 4. Feedback



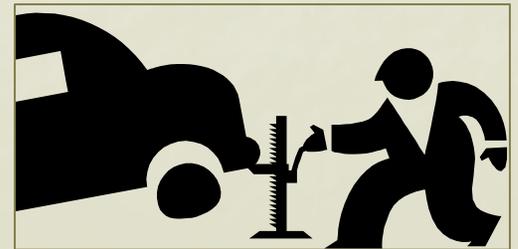
Unit 4: Preparing a Training Outline

- A training outline is a set of instructions and considerations that help you teach.
- The purpose of a training outline is to help you teach the task.



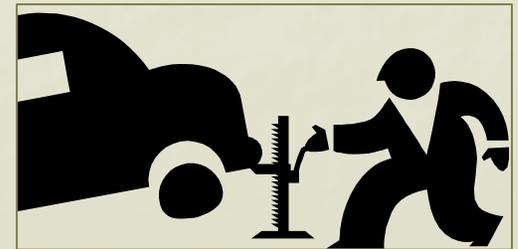
Preparing a Training Outline Activity – Part I

Job Steps



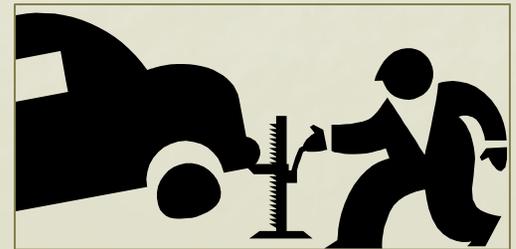
Preparing a Training Outline Activity – Part II

Group and Order Steps



Preparing a Training Outline Activity – Part III

Important Considerations



Unit 5: Coaching Practice



Practice Coaching Activity

Use your skills

- Create a teaching outline
- Take turns as coach, trainee, and observer

Coaching to Different Skill Levels Activity

Match your coaching to the trainee

- Assess the trainee's knowledge and skill
- Adjust your teaching to that level



Unit 6: Wrap-up

Reviewing the Day
Looking to the Future

Review of the Day

- What Is a Coach?
- The Coach/Trainee Relationship
- Coaching Adults
- Preparing a Training Outline
- Coaching Practice

Coaching Support

Contacts and Resources

OJT Coaching Session Preparation

- ❑ Employee scheduled for training
- ❑ Teaching materials developed and available
- ❑ Job tools and equipment available and on site
- ❑ Training materials reviewed and job skills practiced
- ❑ Required forms/documents on hand



Your Next Steps



Coaching Readiness

The self-assessment determines

- Your strengths
- Things you can work on to improve your success as a coach

Workshop Expectations

Coaching Skills Workshop Evaluation



**Coaching Skills
Workshop
For
On-The-Job Training**

This workshop was developed by

**NIOSH/PRL
Launa Mallett
Kathleen Kowalski-Trakofler
Charles Vaught
William Wiehagen
Robert Peters**

**Pennsylvania Services Corporation
Peter F. Keating**

Coaching Skills Workshop Plan

Topic	Page	Time
Preclass Reading: "On Teaching and Learning"	Handout	Before Class
Welcome and Introductions <ul style="list-style-type: none"> ▪ Key Speaker ▪ Prereading Overview ▪ What Do You Expect? ▪ OJT Coaching Preassessment 	ii iii	8:00–8:20
Unit 1: What is a Coach? <ul style="list-style-type: none"> ▪ Successful Coaching ▪ Coaching Readiness Self-Assessment ▪ Characteristics of a Good Coach ▪ WIIFM 	1–3 1–5 1–7 1–11	8:20–9:00
Unit 2: The Coach/Trainee Relationship <ul style="list-style-type: none"> ▪ Establishing a Relationship ▪ Effective Communication <ul style="list-style-type: none"> ○ Listening Skills ○ Asking Good Questions ○ Giving Feedback ○ Communication Skills Summary ▪ Responsibilities 	2–3 2–5 2–7 2–8 2–12 2–15 2–17	9:00–9:50
BREAK		9:50–10:00
Unit 3: Coaching Adults <ul style="list-style-type: none"> ▪ Characteristics of Adult Learners ▪ Experience and Learning ▪ Effective Coaching ▪ Effective Assessment ▪ Coaching Checklist ▪ Steps to Successful Coaching 	3–2 3–5 3–6 3–9 3–10 3–15	10:00–10:50
BREAK		10:50–11:00
Unit 4: Preparing a Training Outline <ul style="list-style-type: none"> ▪ Preparing a Training Outline Activity <ul style="list-style-type: none"> ○ Part I: Job Steps ○ Part II: Group and Order of Steps ○ Part III: Important Considerations 	4–3 4–5 4–6 4–9	11:00–12:00
LUNCH		12:00–12:45
Unit 5: Coaching Practice <ul style="list-style-type: none"> ▪ Practice Coaching Activity 	5–3	12:45 – 2:30
BREAK		2:30 – 2:45
<ul style="list-style-type: none"> ▪ Coaching to Different Skill Levels Activity 	5–15	2:45 – 3:00
Unit 6: Wrap-up <ul style="list-style-type: none"> ▪ Review of the Day ▪ Coaching Support ▪ On-the-Job Coaching Session Preparation ▪ Your Next Steps ▪ Coaching Readiness Self-Assessment ▪ Workshop Expectations ▪ Coaching Skills Workshop Evaluation 	6–3 6–4 6–5 6–6 6–7 6–9 6–11	3:00–4:00
APPENDIX: Evaluation Forms		

What do you expect?

Write below what you expect to get from this workshop.

OJT Coaching Preassessment

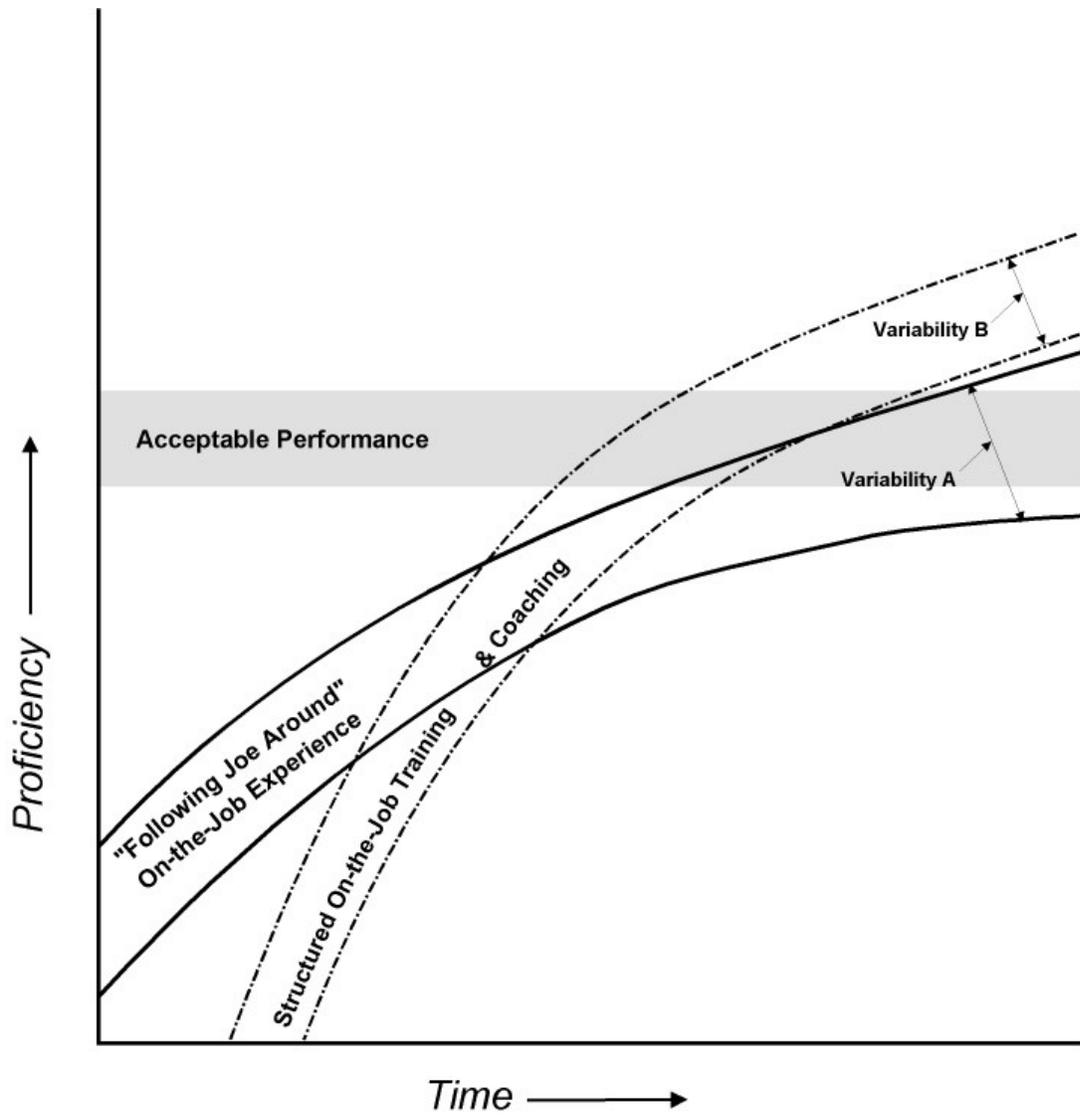
Name: _____

I have the following certifications and/or qualifications related to this topic:

I have experience or training in the following related areas:

<i>Specific Task, Skill, or Job</i>	<i>Classroom</i>	<i>OJT</i>	<i>Other</i>

Why Structure On-The-Job Training?



Unit 1

What Is a Coach?

NOTES

Successful Coaching

This part of the workshop describes what it takes to be a good coach.

A coach “is someone who helps someone else (a trainee) learn something that he or she would have learned less well, more slowly, or not at all if left alone.”

One reason you have been selected as a coach is because of your work knowledge and skills.

But being able to do a job well does not always make a person a good coach. When someone is very good at something, doing the task may have become so automatic that the person is not able to explain it to others (Johnson and Leach, 2001).

Other qualities also make people good coaches. You are likely to have a number of these qualities since you were chosen for this program.

In this section of the workshop you will—

- Assess your coaching strengths
- Discuss qualities that improve coaching.

NOTES

Coaching Readiness Self-Assessment

This form will help you determine your strengths and the things you can work on to improve your success as a coach.

On the scales below, circle the number that reflects how difficult you think each task will be for you. Circle 1 for "very challenging" and 6 for "very easy."

	Challenging					Easy
Box 1						
Prepare for each coaching session.	1	2	3	4	5	6
Teach tasks according to company standards.	1	2	3	4	5	6
Check for trainee understanding.	1	2	3	4	5	6
Box 2						
Answer many questions from a trainee.	1	2	3	4	5	6
Be interested in the success of a new trainee.	1	2	3	4	5	6
Ask the trainee questions to direct the learning process.	1	2	3	4	5	6
Box 3						
Show a trainee what I like about the job.	1	2	3	4	5	6
Be excited about coaching.	1	2	3	4	5	6
Avoid making negative comments.	1	2	3	4	5	6
Box 4						
Laugh when training doesn't go according to plan.	1	2	3	4	5	6
Share stories about things I've learned the hard way.	1	2	3	4	5	6
Box 5						
Admit to a trainee when I don't know the answer.	1	2	3	4	5	6
Address a trainee's concerns about the job.	1	2	3	4	5	6
Box 6						
Adapt lessons to the abilities of a trainee.	1	2	3	4	5	6
Change coaching sessions to meet new constraints.	1	2	3	4	5	6
Box 7:						
Listen to a trainee's opinions about doing a job.	1	2	3	4	5	6
Be open to negative comments.	1	2	3	4	5	6
Work with a trainee who is not like me.	1	2	3	4	5	6
Box 8:						
Participate in training to improve my coaching skills.	1	2	3	4	5	6
Use my supervisor's reviews to improve my coaching skills.	1	2	3	4	5	6
Take my position as a coach seriously.	1	2	3	4	5	6

See the "Characteristics of a Good Coach" discussion to learn more about the topics in each box.

NOTES

Characteristics of a Good Coach

Even the best coaches can improve with training and practice. The coaching readiness self-assessment was designed to help you identify areas where you can improve your coaching skills. The statements on the assessment and the related information in each box define the characteristics of good coaches (adapted from Leach, 1996).

Box 1: Desire

Successful coaches want to coach. They take pride in sharing what they know. Improving their teaching skills is important to them. A successful on-the-job training (OJT) program will have coaches teaching jobs in standardized ways with an emphasis on safety.

Box 2: Responsiveness

Successful coaches need to engage trainees. Their listening and communication skills are key to conveying the right information. Questions can be used to direct the learning process. Successful coaches understand that learning will increase when trainees are comfortable asking questions.

Box 3: Enthusiasm

Successful coaching takes energy. OJT sessions take time to prepare and commitment to conducting them. Coaches who feel good about their jobs will pass on those feelings.

Box 4: Humor

Successful coaches have a good sense of humor. Things don't always go according to plan. Everyone has learned something the hard way. Laughing about things that have gone wrong sends the important message that messing up while learning is OK.

Box 5: Sincerity/Honesty

Successful coaches don't fake it. They truly care about the success of their trainees and deal with them in a straightforward manner. Trainees will respect a coach who admits not knowing something and then goes and finds the answer for both of them.

Box 6: Flexibility

Successful coaches are adaptable. They know when to eliminate, adjust, or change what they are teaching to match the capabilities of the trainee or outside constraints.

Characteristics of a Good Coach – page 2

Box 7: Tolerance

Successful coaches are open to the opinions of others. They recognize and accept differences in personalities. They are interested in what others have to say, even when they don't agree, and accept negative feedback as a tool for improvement.

Box 8: Commitment

Successful coaches improve over time. Training, practice, and honest reviews help coaches develop and refine their skills. Formal certification programs provide a public statement of support from the company. Successful coaches take their coaching duties seriously.

Look back over your answers to the coaching readiness self-assessment.

Boxes with more high numbers circled show areas where you are most confident. These qualities will help you be an effective coach.

Boxes with lower numbers circled show what you can work on to improve your coaching. You can be trained to incorporate these qualities effectively into your coaching even if they do not come naturally to you.

If you gave a low rating because of a barrier related to company policy, practice, or procedure, discuss your concerns with your workshop leader, safety department staff, or supervisor. If you are comfortable bringing up your concern during the workshop, you may find others have similar reservations, and changes are needed to make the OJT coaching program successful at your operation.

**Every coach is different.
Capitalize on your strengths and work to improve other areas.**

Super Coach or Blooper Coach?

Think of someone who did a good job teaching you a skill.

List three things that this coach did that made him or her successful.

1.

2.

3.

Think of someone who did a poor job teaching you a skill.

List three things that this coach did that were not good coaching practices.

1.

2.

3.

Unit 2

The Coach/Trainee Relationship

NOTES

Establishing a Relationship

Coaching is a process that begins when you establish a relationship with the trainee. Remember the three C's that make up a coaching relationship (Hart, 2003).

Communication allows the coach and trainee to understand each other's perspective and appreciate each other as people.

Collaboration occurs when the coach and trainee work together as equals.

Commitment ensures that each person in the relationship fulfills his or her responsibilities.

In the box below are some techniques that will help you establish communication, collaboration, and commitment.

Listening It is important to focus on what the trainee is saying in order to understand his or her perspective.

Observing Coaching involves watching. Sometimes a trainee's body language may tell a lot about what he or she feels or understands.

Questioning Ask questions to find out what is important to the trainee. Be careful to ask questions in a constructive way.

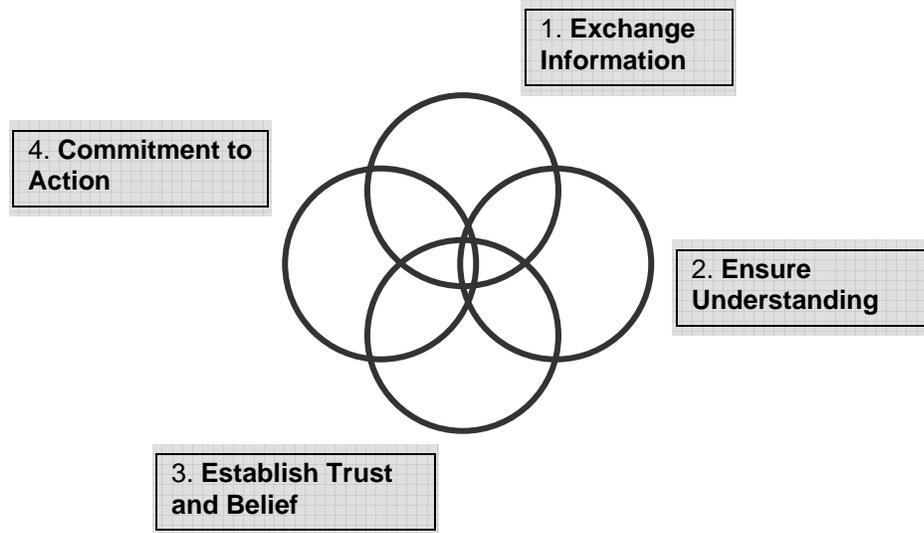
Rephrasing After a trainee makes a statement, it is sometimes useful to restate what you think the trainee meant. This clarifies the trainee's ideas or feelings and shows you are listening.

Remember that *developing a coaching relationship is not the end goal*. The relationship is just a vehicle for helping the trainee develop his or her skills.

NOTES

Effective Communication

The Communication Process



The model above shows the sequence of steps needed for effective communication. If any step is missed or not completed, the process stops until that step is completed successfully.

Think about the following questions:

1. Is it true that all communication is an *exchange of information*?
2. What happens if we do not make sure that there is *understanding*?
3. How can anyone *believe or trust* if they do not understand?
4. How will they *commit to an action* if they do not believe it is in their best interest?

Effective communication involves the successful completion of each step in sequence.

Successful communication can be *learned*. In the following pages are specific techniques you can learn and apply as a coach.

NOTES

Listening Skills

Good listeners—

- Don't interrupt or plan a response while another person is talking.
- Are not judgmental.
- Think before answering.
- Try to face the speaker and maintain eye contact.
- Watch nonverbal behavior; listen with eyes as well as ears.
- Ask questions and wait for an answer.
- Don't have to have the last word.

(Adapted from Richard Gemmet, 1977)

List some ways people communicate nonverbally.

Asking Good Questions

Questions help to get the coach and trainee talking. If asked appropriately, questions make the learner think and participate.



There are two types of questions: **open-ended** and **closed-ended**. Each leads to a different response.

1. Closed-Ended Questions

- Usually result in a straight *yes* or *no* answer.
- Begin with **do, is, can, could, would, should, will, or shall**.

Example: Do you know how to bring this vehicle under control if it starts to slide?

What are your concerns regarding the use of this type of question?

Is there a better way to ask this question?

2. Open-Ended Questions

- Help evaluate trainee understanding and establish strengths and concerns of the trainee.
- Begin with **how, why, when, where, what, who, which,** or **if.**

Example: What would you do to bring this vehicle to a stop if it started into a slide?

What are your concerns regarding the use of this type of question?

Write an open-ended question below.



Closed-ended questions should be avoided as much as possible. They do not lead to interaction or enhance learning.

Open-ended questions should be encouraged. They provide additional details, examples, and impressions.

Translate these closed-ended questions into open-ended ones.

1. Do you know how to operate this type of machine?

2. Do you know what fluids this system uses?

3. Should you inspect the tires as part of the preoperational check?

4. Could you use different types of oil in that gear case?

Giving Feedback

Feedback goes hand-in-hand with successful coaching. The purpose of feedback is to reinforce correct actions and point out actions that need to be corrected through further practice.

Some general suggestions for providing constructive feedback.

- **Provide feedback in terms of clearly stated goals, which is one of the components of effective coaching.**

“You did a good job on the preoperation inspection of your machine. You covered each step in the correct sequence. When should the sequence be modified?”

- **Be specific. Avoid general comments.**

Not, “We need to try that again.” Instead, say something like, “Let’s review step 2, remembering to turn the switch to neutral, and then you can try 1, 2, and 3 again.”

- **Focus on concrete behavior that needs to be either reinforced or corrected.**

“It is important to place your hand here, in this position, to keep your elbow out of the way when making a turn.”

- **Be descriptive rather than judgmental. Focus on actions rather than on personalities.**

Not, “You keep doing this wrong.” Instead, say something like, “What problems could you have if you hold the throttle in while trying to shift gears?”

Feedback Techniques

Praise

- Let trainees know how well they are doing.
- Use sincere praise to create a more constructive atmosphere.

Clarifying

- Restate what you heard the trainee say.
- Listen for confirmation that what you are saying is correct.
- Accept that trainees will often let you know if you are right or wrong.

Boomerang Question

- Redirect a question back to the learner.
- Example: “That’s a good question. What do you think ought to be done in that situation?”

The skillful use of questions is important in giving feedback. It gives you the opportunity to listen and forces the trainee to think through what they are doing and why. Questions can help you guide the feedback session.

Effective coaches—

- ◆ Give plenty of positive feedback.
- ◆ Give negative feedback privately.
- ◆ Accept criticism without becoming defensive.

Informal Versus Formal Feedback

Informal feedback is given as issues arise.

Formal feedback is given at specified times (after completion of a series of steps or at the end of training).

Here are some suggestions for providing informal feedback.

- Be *constructive* and provide feedback as issues arise.
- *Demonstrate* a correct procedure rather than letting the trainee stumble along without guidance.
- Provide feedback in a *timely and tension-reducing manner* during the procedure. This may be a good time to incorporate humor into the coaching session.
- Do not *overload* trainees with too much feedback. Get a sense of how *they* think they are doing.

Here are some suggestions for providing formal feedback.

- Base your feedback on a written checklist.
- Start and end with a positive statement. Put areas that need improvement in the middle.
- If you present a problem, be ready to suggest a solution.
- Ask trainees to summarize the feedback session. Tell them to focus on their demonstrated strengths, describe areas needing improvement, and suggest what they can do to improve.

Communication Skills Summary

Successful communication can be learned.

There are specific techniques you can apply as an effective coach.

What are some of the key behaviors for good communication?

Responsibilities

An OJT coach is part of a team. His or her supervisor, the supervisor of the trainee, and the trainee will be involved in the process. Successful training takes place when team members work together.

The coach's responsibilities include—

- Assessing trainee knowledge and skills
- Organizing and planning training
- Developing a relationship with the trainee
- Teaching knowledge and skills
- Evaluating progress
- Suggesting changes needed to the program

The supervisor's responsibilities include—

- Pairing trainees with an appropriate coach or coaches
- Providing on-going support for coaches
- Assisting in determining training and task training materials
- Evaluating the trainee's proficiency
- Assessing coaching skills
- Initiating follow-up for trainees

The trainee's responsibilities include—

- Being actively involved in the training
- Developing a relationship with the coach
- Mastering the material taught

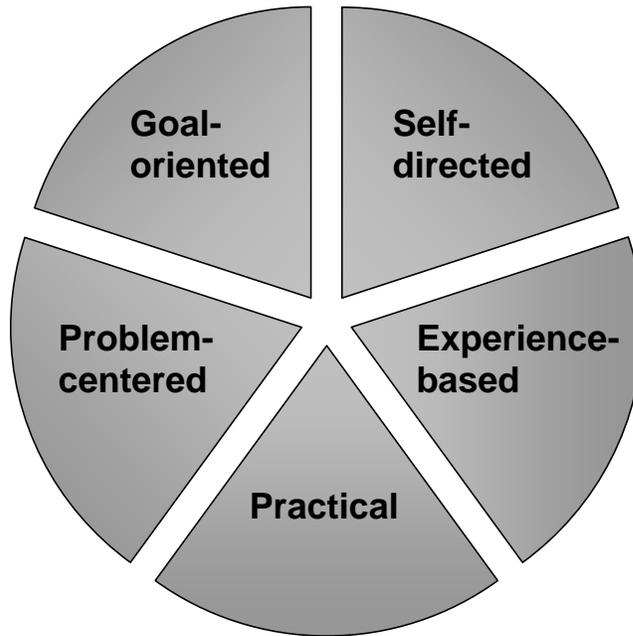
NOTES

Unit 3

Coaching Adults

Characteristics of Adult Learners

Adults learn differently than children. Some characteristics of adult learning that research has taught us are shown on the pie chart below. Coaching strategies based on adult learner characteristics are given in the table.



Characteristics of Adult Learners	Coaching Strategies
Self-directed	<i>Adults tend to take the initiative in learning. As a coach, you serve as a facilitator and allow the trainee to help set the pace based on how comfortable he or she is with the new skills.</i>
Experience-based	<i>Adults have accumulated a foundation of knowledge over their lifetime. Help the trainee connect learning to this knowledge and experience base by drawing out experience that is relevant to what is being taught.</i>
Practical	<i>Adults learn something in order to apply it. There must be a job-related application for what is being learned. Explain how the lesson content will be useful on the job.</i>
Problem-centered	<i>Adults learn from real life examples. Show the trainee how new knowledge and skills can be applied to solving work problems.</i>
Goal-oriented	<i>Adults appreciate a program that is organized and has clearly defined objectives. Show the trainee how the training will help him or her achieve goals.</i>

Adult Learners Activity

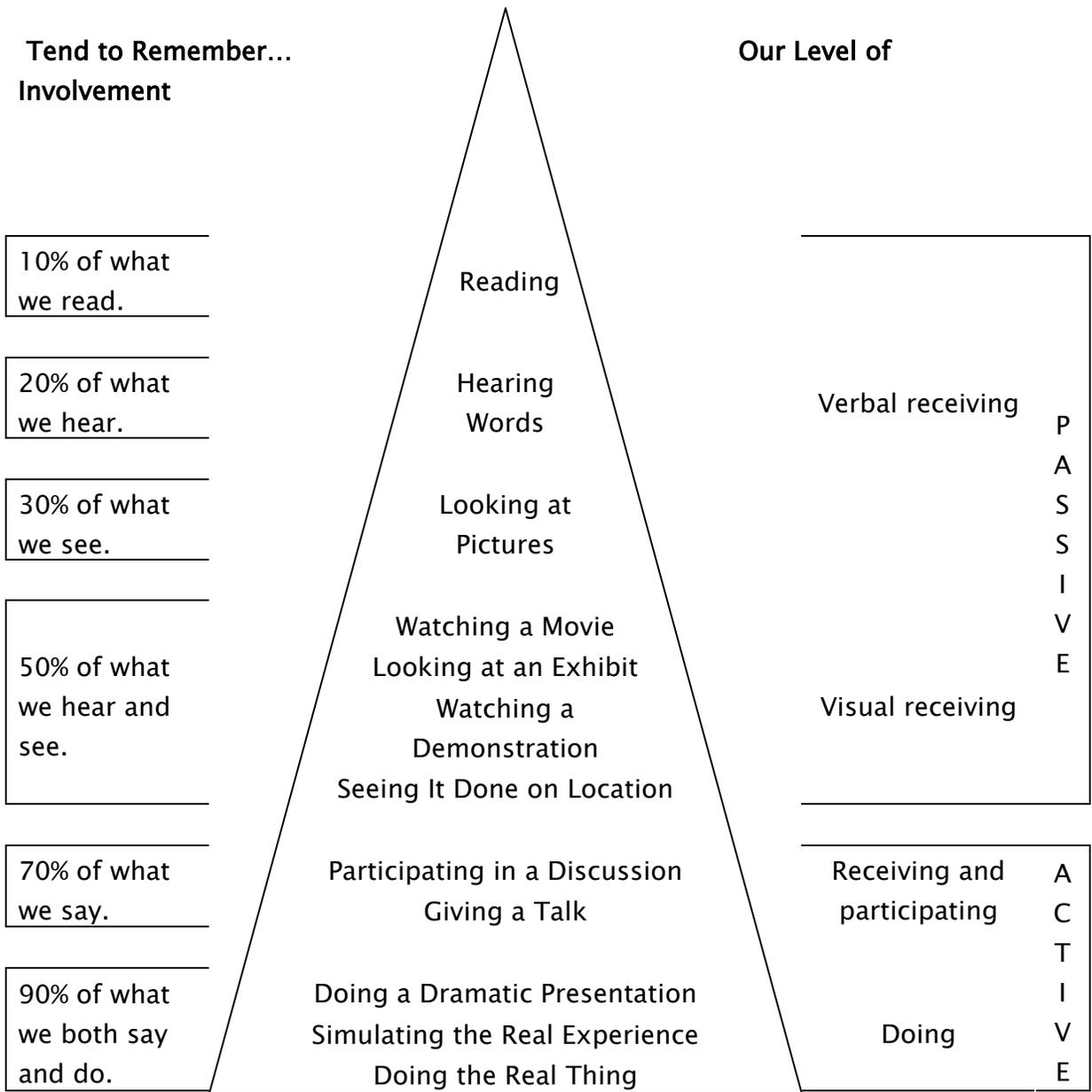
Based on the class discussion, write notes about how you would incorporate these characteristics into your coaching.

Characteristics of adult learners	Coaching strategies
Self-directed	
Experience-based	
Practical	
Problem-centered	
Goal-oriented	

NOTES

Experience and Learning

Cone of Learning



Developed and revised by Bruce Myland from materials by Edgar Dale. URL: <http://php.indiana.edu/~bobweb/Handout/cone.html>

Effective Coaching

1. Clear goals
2. Valid content
3. Appropriate delivery methods
4. Authentic assessment
5. Remediation



Components	Coaching Tips
Clear goals	The program presentation should be organized and have clearly defined capabilities the trainee will be able to demonstrate following the training, e.g., “conduct a walk-around inspection.”
Valid content	Training content is dictated by the training goals. For instance, if one goal or capability is to have the trainee be able to install a roof bolt, part of the content would be bolt installation.
Appropriate delivery method	"Delivery method" refers to how the message is gotten across. Using the example above, bolt installation should be taught by first demonstrating the task and then allowing hands-on practice.
Assessment	Some way of evaluating whether or not the trainee is performing adequately must be incorporated into the training. This may be as simple as watching the trainee operate the equipment and responding with feedback along the way.
Remediation	Remediation provides an opportunity for the trainee to correct his or her mistakes and practice doing the task(s) correctly.

Effective Coaching Activity

Write notes about how each step would be covered for a specific topic.

Components

Clear goals

Valid content

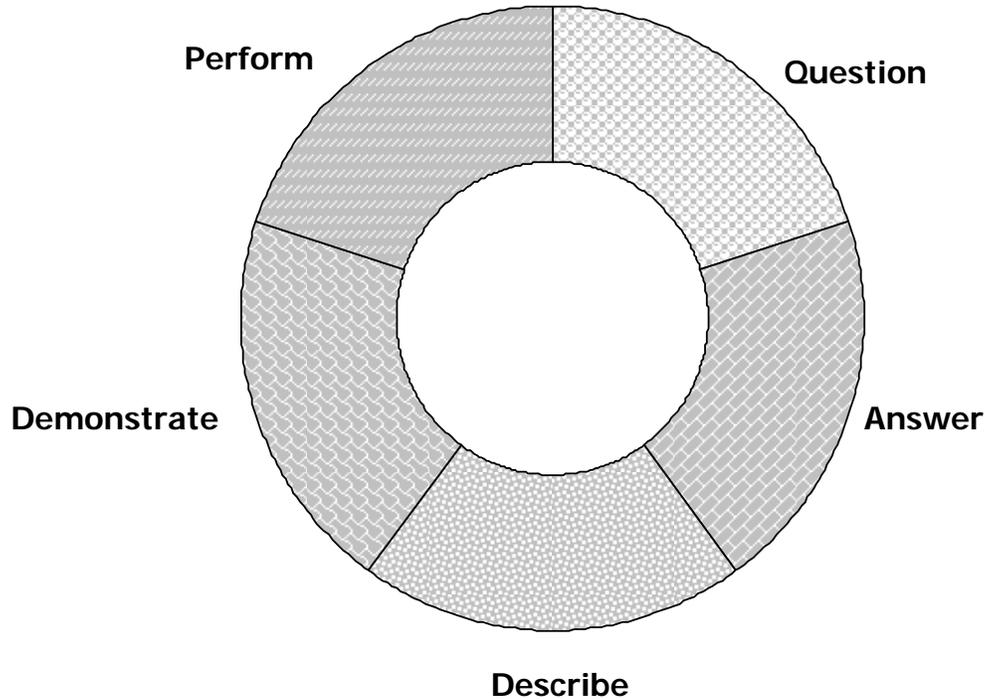
**Appropriate
delivery method**

Assessment

Remediation

NOTES

Effective Assessment



Assessment is key to the learning process and should be built into the program. Simply put, assessment seeks to answer the questions of "How will you know if your trainees have learned the task?" "How will you know if the learning goal has been reached?"

The effective assessment wheel will aid this process. The wheel has five components that reflect assessment questions.

1. Do the trainee's *questions* show they are engaged in learning?
2. Is the trainee able to *answer* your questions?
3. Is the trainee able to *describe* how to perform the tasks?
4. Can the trainee *demonstrate* the job tasks?
5. Can the trainee *perform* the job independently?

Coaching Checklist

The checklist on the following pages is a job aid to use (1) as you are preparing to coach, (2) while you are coaching, and (3) for self-evaluation after coaching. The checklist summarizes the coaching steps and gives you tips for completing each one successfully.

Coaching Checklist

Use this form as a guide when preparing to coach, while coaching, and/or for self-evaluation. Observers can also use the form when evaluating a coach.

Coach's Name:	Observer's Name:
Job Skill Taught:	Evaluation Date:

Step 1 –Focus: Establish rapport, communicate your expectations, and find out what the trainee can do			
<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
<input type="checkbox"/>	Greet trainee	Shake hands, maintain eye contact, and put trainee at ease.	
<input type="checkbox"/>	Determine what trainee knows	Ask questions to establish level of knowledge or experience.	
<input type="checkbox"/>	Encourage questions	Let trainee know it's OK to repeat steps. Explain that training is paced to trainee's prior experience and ability to learn the job.	
<input type="checkbox"/>	Share an overview of the job to be taught	Provide a copy of the module you and trainee will be using to guide training.	
<input type="checkbox"/>	Discuss training safety considerations	Ensure that trainee will be able to observe safely during demonstrations. Discuss other safety considerations.	

Coaching Checklist

<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
Step 2 – Explain and demonstrate: Explain the steps of the job, explain why these steps are important, and demonstrate them			
<input type="checkbox"/>	Explain the step(s) of job skill	Give only the amount of information trainee can learn in one pass. Do not overwhelm.	
<input type="checkbox"/>	Explain why, when, and how each step is important	Be sure job steps make sense to trainee. Ask questions to check understanding.	
<input type="checkbox"/>	Demonstrate how to do the job step(s)	Show trainee a safe observation location. Ask questions to determine knowledge and understanding before moving to next job step.	
<input type="checkbox"/>	Encourage questions	Emphasize trainee should ask questions when unclear or uncertain.	
<input type="checkbox"/>			
Step 3 – Observe: Have trainee explain and demonstrate what coach presented in step 2			
<input type="checkbox"/>	Have trainee verbally walk through step(s)	Trainee explains the job (why, where, when, how, and any safety considerations) before demonstrating any part of it. – <u>They know it.</u>	
<input type="checkbox"/>	Select a safe observation location	Be sure you can safely observe the entire demonstration.	
<input type="checkbox"/>	Have trainee explain each step and then demonstrate it	Trainee tells what will be done just before performing each job step– <u>They know and can do it.</u>	
<input type="checkbox"/>	Observe trainee demonstrating job		

Coaching Checklist

<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
Step 4 – Feedback: Coach and trainee discuss performance in step 3			
<input type="checkbox"/>	Ask trainee to do a self-assessment	Ask trainee to communicate perceptions of performance. This encourages trainees to discuss task and helps resolve issues.	
<input type="checkbox"/>	Give feedback on performance	Point out strengths and areas that need improvement or practice.	
<input type="checkbox"/>	Assess your coaching progress	Did I periodically check to establish trainee's level of understanding? How was my pace? Am I giving the trainee sufficient time to perform? Am I asking the right questions? How is the trainee doing overall? Should I go back and restate or emphasize something?	
<input type="checkbox"/>			

Cycle through steps 2, 3 and 4 as needed to develop the expected performance and to ensure understanding before moving on.

Coaching Checklist

Step 5 – Assessment: Higher level of management or a predetermined evaluation team conduct formal evaluation. Local rules for this evaluation should be followed.			
<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
<input type="checkbox"/>	Establish trainee's readiness for evaluation	Prepare trainee by checking on level of comfort and readiness. Observe and ask questions. Create a win-win situation.	
<input type="checkbox"/>	Make arrangements for evaluation	Schedule with appropriate people. Make sure evaluator has evaluation checklist (often made from the training outline).	
<input type="checkbox"/>	Based on outcome of evaluation, consider the next steps	Celebrate. Congratulate and thank trainee for participating in training activity. Discuss follow-up plans. Retrain, if needed. Plan with evaluator's input. Communicate results and retraining plan.	
<input type="checkbox"/>			

If the process is not over, then move back to the appropriate level and resume with the proper step. If the training is over, do a self-assessment to determine what you will do differently the next time.

Steps to Successful Coaching

1. Focus

- Establish rapport
- Communicate your expectations
- Find out what the trainee can do

THEN

2. Explain and Demonstrate

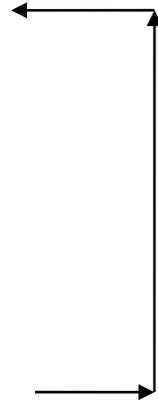
- Explain the steps of the job
- Explain why they are important
- Demonstrate them

3. Observe

- Trainee explains and demonstrates what the coach presented in step 2

4. Feedback

- Coach and trainee discuss the performance in step 3



Cycle through steps 2, 3, and 4 to—

- Develop the expected performance
- Ensure understanding
- Move on

NOTES

Unit 4

Preparing a Training Outline

NOTES

Preparing a Training Outline Activity

Scenario: Your neighbor is going to interview for a job in a city 800 miles away. She is planning to drive to the interview. While talking about her upcoming trip with her, you learn that she has never changed a tire and that she wants to learn this skill before leaving home. You tell her you would be happy to teach her the proper and safe way to change a tire.

Task: Develop a training outline for changing a tire.

A training outline is a set of instructions and considerations that help you teach your neighbor.

The purpose of the training outline is to help YOU teach the task of changing a tire.

Note that evaluation, including offering feedback, is an important part of teaching.

Teams should include three to five members.

NOTES

Preparing a Training Outline Activity

Part I - Job Steps

Make a list of steps for changing a tire.

Brainstorm all the steps that might be involved in teaching your neighbor how to change a tire. Don't worry about the order of the steps.

Choose one of the group members to make a list of the steps that the group identifies and one to present the list to the class.

List of steps:

Each team will report their list to the class.

Preparing a Training Outline Activity **Part II - Group and Order of Steps**

Put the steps into a logical order that you think would make sense while teaching this task.

Organize the list of steps into practical groups. For example, put together all the steps needed to park the car.

Follow this example for organizing your steps. Use the form on the next page to write up your groups and steps.

Job: Change a tire	
Group	Job Steps and Substeps
Preparing	Find a location to pull off the road
	Exit car Turn off ignition Set parking brake

Each team will report their outline to the class. Teams may change their outlines after the reports are given.

Preparing a Training Outline Activity

Job:		
Group	Job Steps and Substeps	Coaching Considerations

NOTES

Preparing a Training Outline Activity

Part III - Important Considerations

Have the team examine each step to determine the considerations you need to demonstrate or mention as you teach.

Add considerations to the table you started in Part II of this activity.

Job: Change a tire		
Group	Job Steps and Substeps	Coaching Considerations
Preparing	Find a location to pull off the road	* Width of berm * Level area * Away from traffic
	Exit car Turn off ignition Set parking brake	*Watch for traffic *Take your keys with you

NOTES

Unit 5

Coaching Practice

NOTES

Practice Coaching Activity

Changing a tire is a skill. You can use the same system to teach any skill.

As a class, select three simple jobs or parts of a job to be taught. In teams of three, have each person select a different one of the three jobs.

1. Each person should create a teaching outline for a couple of steps of their job. Use the form on page 5.
2. In your team, take turns being coach, trainee, and observer. Remember to use adult learning principles and the responsibilities of a coach covered earlier in this training.
 - a. Always begin with a preassessment. Use the OJT trainee preassessment form (page 7).
 - b. During the practice coaching, *the observer* should use the OJT observer form (pages 9 and 10).
 - c. After the practice coaching, *the coach* should complete the OJT trainee progress review (page 11).
 - d. After the practice coaching, *the trainee* should complete the OJT trainee feedback form (page 13).

Discuss your coaching practice sessions when the trainer brings your class back together.

NOTES

Practice Coaching Activity

Job:		
Group	Job Steps and Substeps	Coaching Considerations

OJT Trainee Preassessment

Subject of OJT: _____

Name of trainee: _____

1. Trainee has the following certifications/qualifications related to this topic:

2. Trainee has experience or training in the following related areas:

<i>Specific task, skill, or job</i>	<i>Classroom</i>	<i>OJT</i>	<i>Other</i>

3. Trainee needs the following training before starting this OJT program:

OJT Observer's Form (page 1)

Use this form while observing an OJT session. Discuss it later with the coach.

Subject of OJT _____

Name of coach: _____

Check the box if you see the coach exhibiting the behavior listed.

Box 1: Desire

- | |
|--|
| <input type="checkbox"/> Was prepared for the session |
| <input type="checkbox"/> Taught tasks according to company standards |
| <input type="checkbox"/> Checked for trainee understanding |

Briefly note what you observed.

Box 2: Responsiveness

- | |
|---|
| <input type="checkbox"/> Patiently answered the trainee's questions |
| <input type="checkbox"/> Seemed to want this trainee to succeed |
| <input type="checkbox"/> Asked questions to direct the learning process |

Briefly note what you observed.

Box 3: Enthusiasm

- | |
|---|
| <input type="checkbox"/> Was positive about the job |
| <input type="checkbox"/> Avoided negative comments |

Briefly note what you observed.

Box 4: Humor

- | |
|--|
| <input type="checkbox"/> Kept his or her sense of humor |
| <input type="checkbox"/> Shared stories about his or her experiences |

Briefly note what you observed.

OJT Observer's Form (page 2)

Check the box if you see the coach exhibiting the behavior listed.

Box 5: Sincerity/Honesty

- | |
|--|
| <input type="checkbox"/> Admitted that he or she didn't know something |
| <input type="checkbox"/> Seemed to care about the trainee |

Briefly note what you observed.

Box 6: Flexibility

- | |
|--|
| <input type="checkbox"/> Matched the training to the ability of the trainee |
| <input type="checkbox"/> Changed the teaching session to match some constraint |

Briefly note what you observed.

Box 7: Tolerance

- | |
|--|
| <input type="checkbox"/> Was open to the opinions of the trainee |
| <input type="checkbox"/> Seemed comfortable with the trainee |

Briefly note what you observed.

Box 8: Commitment

- | |
|--|
| <input type="checkbox"/> Has improved since my last observation. |
|--|

Briefly note what you observed.

Write one thing you think the coach should work on for future coaching sessions.

Write one thing you think the coach did well while coaching this trainee:

OJT Progress Review

Subject of OJT: _____

Name of trainee: _____

As of today (_____), I believe this trainee:

- Has successfully completed this on-the-job training.
- Should continue this on-the-job training for—

<i>More training</i>	<i>More practice</i>	<i>On this specific task or skill</i>

- Should discontinue this on-the-job training.

Signature of coach

Notes on trainee's progress: _____

OJT Trainee Feedback

Subject of OJT _____

Name of coach: _____

Please answer the following questions when you have finished your OJT and give the form to your supervisor. Your answers will help improve the OJT coaching program.

1. Check the box that best reflects how often your coach did the things listed below.

My Coach:

	Always	Sometimes	Never	Doesn't apply
Checked to see if I understood				
Answered my questions				
Was patient with me				
Let me know he or she wanted me to succeed				
Was positive about the job				
Was prepared to teach my OJT sessions				
Had a sense of humor				
Shared stories about his or her experiences				
Listened to my concerns about the job				
Explained things at a level I could understand				
Seemed comfortable with me				
Made me feel comfortable				

2. Check all the statements that reflect what you think about your OJT experience.

During My On-the-Job Training:

<input type="checkbox"/>	The information was given to me at about the right speed.
<input type="checkbox"/>	I had enough time to practice my new skills.
<input type="checkbox"/>	Other employees made me nervous.
<input type="checkbox"/>	I understood what I was supposed to learn.
<input type="checkbox"/>	Tools and equipment were always available for my training sessions.
<input type="checkbox"/>	I was comfortable asking questions.
<input type="checkbox"/>	It was OK to make mistakes.
<input type="checkbox"/>	I became confident I could do the job.

3. List three important things you learned about the job or equipment during your OJT.

Coaching to Different Skill Levels Activity

The topic for this activity is the same job that you used in the Practice Coaching activity. This time your instructor will play the role of different trainees having various levels of expertise and experience.

Class members chosen to be coaches should use the OJT trainee preassessment on the next page to determine how much experience he or she has with the job.

OJT Trainee Preassessment

Subject of OJT: _____

Name of trainee: _____

Trainee has the following certifications/qualifications related to this topic:

Trainee has experience or training in the following related areas:

<i>Specific task, skill, or job</i>	<i>Classroom</i>	<i>OJT</i>	<i>Other</i>

Trainee needs the following training before starting this OJT program:

Unit 6

Wrap-up

NOTES

Review of the Day

Topic	Page
Welcome and Introductions	
▪ What do you expect?	ii
▪ OJT coaching and preassessment	iii
Unit 1: What Is a Coach?	
▪ Successful Coaching	1-3
▪ Coaching Readiness Self-Assessment	1-5
▪ Characteristics of a Good Coach	1-7
▪ WIIFM	1-11
Unit 2: Coach/Trainee Relationship	
▪ Establishing a Relationship	2-3
▪ Effective Communication	2-5
○ Listening Skills	2-7
○ Asking Good Questions	2-8
○ Giving Feedback	2-12
▪ Responsibilities	2-17
Unit 3: Coaching Adults	
▪ Characteristics of Adult Learners	3-2
▪ Experience and Learning	3-5
▪ Effective Coaching	3-6
▪ Effective Assessment	3-9
▪ Coaching Checklist	3-10
▪ Steps to Successful Coaching	3-15
Unit 4: Preparing a Training Outline	
▪ Preparing a Training Outline Activity	4-3
○ Job Steps	4-5
○ Group and Order Steps	4-6
○ Important Considerations	4-9
Unit 5: Coaching Practice	
▪ Practice Coaching Activity	5-3
○ OJT Forms	
• Trainee Preassessment	5-7
• Observer's Form	5-9
• Progress Review	5-11
• Trainee Feedback Form	5-13
▪ Coaching to Different Skill Levels Activity	

Coaching Support

This workshop was designed to help you assess and improve your coaching skills. Completion of the workshop is just the beginning. You will need to practice your coaching skills.

As you continue to learn, you will have support.

When you would like to talk with someone about coaching, contact—

When you would like to read more about coaching, find resources here.

Preparation for On-the-Job Coaching Session

Coaching success is a result of being prepared. Use the following checklist for each OJT session.

- Employee scheduled for training.
- Teaching materials developed and available.
- Job tools and equipment available and on-site.
- Training materials reviewed and job skills practiced.
- Required forms and documents on hand.

Job Aids

On the job, it is useful to have easily accessible sources for information. Job aids can help trainees remember key points after they finish training.

The job aid above will remind you of key things to do before each coaching session. Think about other information from this workshop that will help you be a successful coach and then create job aids for yourself to use and share with other coaches.

Your Next Steps

Being a successful coach takes commitment. List below the things you will do to improve your coaching skills.

Coaching Readiness Self-Assessment

This form will help you determine your strengths and the things you can work on to improve your success as a coach.

On the scales below, circle the number that reflects how difficult you think each task will be for you. Circle 1 for "very challenging" and 6 for "very easy."

	Challenging					Easy
Box 1:						
Prepare for each coaching session	1	2	3	4	5	6
Teach tasks according to company standards	1	2	3	4	5	6
Check for trainee understanding	1	2	3	4	5	6

Box 2:						
Answer many questions from a trainee	1	2	3	4	5	6
Be interested in the success of a new trainee	1	2	3	4	5	6
Ask the trainee questions to direct the learning process	1	2	3	4	5	6

Box 3:						
Show a trainee what I like about the job	1	2	3	4	5	6
Be excited about coaching	1	2	3	4	5	6
Avoid making negative comments	1	2	3	4	5	6

Box 4:						
Laugh when training doesn't go according to plan	1	2	3	4	5	6
Share stories about things I've learned the hard way	1	2	3	4	5	6

Box 5:						
Admit to a trainee when I don't know an answer	1	2	3	4	5	6
Address a trainee's concerns about the job	1	2	3	4	5	6

Box 6:						
Adapt lessons to the abilities of a trainee	1	2	3	4	5	6
Change coaching sessions to meet new constraints	1	2	3	4	5	6

Box 7:						
Listen to trainee's opinions about doing the job	1	2	3	4	5	6
Be open to negative comments	1	2	3	4	5	6
Work with a trainee who is not like me	1	2	3	4	5	6

Box 8:						
Participate in training to improve my coaching skills	1	2	3	4	5	6
Use my supervisor's reviews to improve my coaching skills	1	2	3	4	5	6
Take my position as a coach seriously	1	2	3	4	5	6

NOTES

Workshop Expectations

At the beginning of this workshop, you wrote down what you expected to learn from this workshop, and your expectations were discussed with the class.

1. Which expectations were met?

2. Which expectations were not fully met?

NOTES

Coaching Skills Workshop Evaluation

Please complete the following to help us monitor and improve the quality of training.

Job title: _____

Years of mining experience: _____ Have you conducted OJT before? Yes No

How relevant was the training for you?			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very relevant	Somewhat relevant	Mostly irrelevant	Totally irrelevant
How easy was the training to follow?			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Very easy	Somewhat easy	Difficult	Too difficult
How would you describe the quality of the training materials?			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Excellent	Good	Average	Poor
How do you rate the delivery of the training?			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Excellent	Good	Average	Poor

Would you recommend this course to others? Why or why not?

What was the most important thing you learned? Why was that important?

What would you change about this workshop and why?

What would you keep and why?

Appendix Evaluation Forms

Evaluation Forms

These forms were given earlier in this workbook. The additional copies are provided so they can be used in class or to make more copies without breaking up the workbook.

Coaching Readiness Self-Assessment. Introduced in Unit 1, page 5 (also used in Unit 6, page 7).

The purpose of this form is to help the OJT coach assess his or her teaching strengths and weaknesses. It can guide the coach in seeking training and/or resources for improvement.

Coaching Training Outline. Introduced in Unit 4, page 6 (also used in Unit 5, page 5).

This chart is designed to help organize a training outline and prepare training sessions before they begin.

Coaching Checklist. Introduced in Unit 3, page 10.

This checklist summarizes the coaching steps. It is to be used as a job aid (1) before training, (2) while coaching, and (3) for self-evaluation after coaching.

OJT Trainee Preassessment. Introduced on page iii (also used in Unit 5, page 7).

This form is used to determine the trainee's knowledge and skill level before training begins and can be a guide to help tailor training to the specific trainee.

OJT Observer. Introduced in Unit 5, page 9.

This form provides feedback to the trainer on an OJT session. The observer could be a supervisor or another OJT coach.

OJT Progress Review. Introduced in Unit 5, page 11.

This form provides feedback to the trainee. It can be completed by a supervisor or the OJT coach. It can also be used as a sign-off form to document completion of training.

OJT Trainee Feedback Introduced in Unit 5, page 13.

This form is to be completed by the trainee to provide feedback to the OJT coach and the program champion. The information can be used by the coach for self-improvement and by the program champion to assess whether or not changes are needed in the program or its implementation.

Coaching Readiness Self-Assessment

This form will help you determine your strengths and the things you can work on to improve your success as a coach.

On the scales below, circle the number that reflects how difficult you think each task will be for you. Circle 1 for "very challenging" and 6 for "very easy."

	Challenging					Easy
Box 1:						
Prepare for each coaching session	1	2	3	4	5	6
Teach tasks according to company standards	1	2	3	4	5	6
Check for trainee understanding	1	2	3	4	5	6
Box 2:						
Answer many questions from a trainee	1	2	3	4	5	6
Be interested in the success of a new trainee	1	2	3	4	5	6
Ask the trainee questions to direct the learning process	1	2	3	4	5	6
Box 3:						
Show a trainee what I like about the job	1	2	3	4	5	6
Be excited about coaching	1	2	3	4	5	6
Avoid making negative comments	1	2	3	4	5	6
Box 4:						
Laugh when training doesn't go according to plan	1	2	3	4	5	6
Share stories about things I've learned the hard way	1	2	3	4	5	6
Box 5:						
Admit to a trainee when I don't know an answer	1	2	3	4	5	6
Address a trainee's concerns about the job	1	2	3	4	5	6
Box 6:						
Adapt lessons to the abilities of a trainee	1	2	3	4	5	6
Change coaching sessions to meet new constraints	1	2	3	4	5	6
Box 7:						
Listen to trainee's opinions about doing the job	1	2	3	4	5	6
Be open to negative comments	1	2	3	4	5	6
Work with a trainee who is not like me	1	2	3	4	5	6
Box 8:						
Participate in training to improve my coaching skills	1	2	3	4	5	6
Use my supervisor's reviews to improve my coaching skills	1	2	3	4	5	6
Take my position as a coach seriously	1	2	3	4	5	6

Coaching Training Outline (page _____)

Job:		
Group	Job Steps/Substeps	Coaching Considerations

Coaching Training Outline (page _____)

Job:		
Group	Job Steps/Sub-Steps	Coaching Considerations

Coaching Checklist

Use this form as a guide when preparing to coach, while coaching, and/or for self-evaluation. Observers can also use the form when evaluating a coach.

Coach's Name:	Observer's Name:
Job Skill Taught:	Evaluation Date:

Step 1 –Focus: Establish rapport, communicate your expectations, and find out what the trainee can do			
<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
<input type="checkbox"/>	Greet trainee	Shake hands, maintain eye contact, and put trainee at ease.	
<input type="checkbox"/>	Determine what trainee knows	Ask questions to establish level of knowledge or experience.	
<input type="checkbox"/>	Encourage questions	Let trainee know it's OK to repeat steps. Explain that training is paced to trainee's prior experience and ability to learn the job.	
<input type="checkbox"/>	Share an overview of the job to be taught	Provide a copy of the module you and trainee will be using to guide training.	
<input type="checkbox"/>	Discuss training safety considerations	Ensure that trainee will be able to observe safely during demonstrations. Discuss other safety considerations.	

Coaching Checklist

<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
Step 2 – Explain and demonstrate: Explain the steps of the job, explain why these steps are important, and demonstrate them			
<input type="checkbox"/>	Explain the step(s) of job skill	Give only the amount of information trainee can learn in one pass. Do not overwhelm.	
<input type="checkbox"/>	Explain why, when, and how each step is important	Be sure job steps make sense to trainee. Ask questions to check understanding.	
<input type="checkbox"/>	Demonstrate how to do the job step(s)	Show trainee a safe observation location. Ask questions to determine knowledge and understanding before moving to next job step.	
<input type="checkbox"/>	Encourage questions	Emphasize trainee should ask questions when unclear or uncertain.	
<input type="checkbox"/>			
Step 3 – Observe: Have trainee explain and demonstrate what coach presented in step 2			
<input type="checkbox"/>	Have trainee verbally walk through step(s)	Trainee explains the job (why, where, when, how, and any safety considerations) before demonstrating any part of it. – <u>They know it.</u>	
<input type="checkbox"/>	Select a safe observation location	Be sure you can safely observe the entire demonstration.	
<input type="checkbox"/>	Have trainee explain each step and then demonstrate it	Trainee tells what will be done just before performing each job step– <u>They know and can do it.</u>	
<input type="checkbox"/>	Observe trainee demonstrating job		

Coaching Checklist

<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
Step 4 – Feedback: Coach and trainee discuss performance in step 3			
<input type="checkbox"/>	Ask trainee to do a self-assessment	Ask trainee to communicate perceptions of performance. This encourages trainees to discuss task and helps resolve issues.	
<input type="checkbox"/>	Give feedback on performance	Point out strengths and areas that need improvement or practice.	
<input type="checkbox"/>	Assess your coaching progress	Did I periodically check to establish trainee's level of understanding? How was my pace? Am I giving the trainee sufficient time to perform? Am I asking the right questions? How is the trainee doing overall? Should I go back and restate or emphasize something?	
<input type="checkbox"/>			

Cycle through steps 2, 3 and 4 as needed to develop the expected performance and to ensure understanding before moving on.

Coaching Checklist

Step 5 – Assessment: Higher level of management or a predetermined evaluation team conduct formal evaluation. Local rules for this evaluation should be followed.			
<input checked="" type="checkbox"/>	Things to do:	Guidelines	Comments
<input type="checkbox"/>	Establish trainee's readiness for evaluation	Prepare trainee by checking on level of comfort and readiness. Observe and ask questions. Create a win-win situation.	
<input type="checkbox"/>	Make arrangements for evaluation	Schedule with appropriate people. Make sure evaluator has evaluation checklist (often made from the training outline).	
<input type="checkbox"/>	Based on outcome of evaluation, consider the next steps	Celebrate. Congratulate and thank trainee for participating in training activity. Discuss follow-up plans. Retrain, if needed. Plan with evaluator's input. Communicate results and retraining plan.	
<input type="checkbox"/>			

If the process is not over, then move back to the appropriate level and resume with the proper step. If the training is over, do a self-assessment to determine what you will do differently the next time.

OJT Trainee Preassessment

Subject of OJT: _____

Name of trainee: _____

Trainee has the following certifications/qualifications related to this topic:

Trainee has experience or training in the following related areas:

<i>Specific task, skill, or job</i>	<i>Classroom</i>	<i>OJT</i>	<i>Other</i>

Trainee needs the following training before starting this OJT program:

OJT Observer's Form (page 1)

Use this form while observing an OJT session. Discuss it later with the coach.

Subject of OJT _____

Name of coach: _____

Check the box if you see the coach exhibiting the behavior listed.

Box 1: Desire

- | |
|--|
| <input type="checkbox"/> Was prepared for the session |
| <input type="checkbox"/> Taught tasks according to company standards |
| <input type="checkbox"/> Checked for trainee understanding |

Briefly note what you observed.

Box 2: Responsiveness

- | |
|---|
| <input type="checkbox"/> Patiently answered the trainee's questions |
| <input type="checkbox"/> Seemed to want this trainee to succeed |
| <input type="checkbox"/> Asked questions to direct the learning process |

Briefly note what you observed.

Box 3: Enthusiasm

- | |
|---|
| <input type="checkbox"/> Was positive about the job |
| <input type="checkbox"/> Avoided negative comments |

Briefly note what you observed.

Box 4: Humor

- | |
|--|
| <input type="checkbox"/> Kept his or her sense of humor |
| <input type="checkbox"/> Shared stories about his or her experiences |

Briefly note what you observed.

OJT Observer's Form (page 2)

Check the box if you see the coach exhibiting the behavior listed.

Box 5: Sincerity/Honesty

- | |
|--|
| <input type="checkbox"/> Admitted that he or she didn't know something |
| <input type="checkbox"/> Seemed to care about the trainee |

Briefly note what you observed.

Box 6: Flexibility

- | |
|--|
| <input type="checkbox"/> Matched the training to the ability of the trainee |
| <input type="checkbox"/> Changed the teaching session to match some constraint |

Briefly note what you observed.

Box 7: Tolerance

- | |
|--|
| <input type="checkbox"/> Was open to the opinions of the trainee |
| <input type="checkbox"/> Seemed comfortable with the trainee |

Briefly note what you observed.

Box 8: Commitment

- | |
|--|
| <input type="checkbox"/> Has improved since my last observation. |
|--|

Briefly note what you observed.

Write one thing you think the coach should work on for future coaching sessions:

Write one thing you think the coach did well while coaching this trainee:

OJT Progress Review

Subject of OJT: _____

Name of trainee: _____

As of today (_____), I believe this trainee:

- Has successfully completed this on-the-job training.
- Should continue this on-the-job training for—

<i>More training</i>	<i>More practice</i>	<i>On this specific task or skill</i>

- Should discontinue this on-the-job training.

Signature of coach

Notes on trainee's progress _____

OJT Trainee Feedback

Subject of OJT _____

Name of Coach: _____

Please answer the following questions when you have finished your OJT and give the form to your supervisor. Your answers will help improve the OJT coaching program.

 1. Check the box that best reflects how often your coach did the things listed below.

My Coach:

	Always	Sometimes	Never	Doesn't apply
Checked to see if I understood				
Answered my questions				
Was patient with me				
Let me know he or she wanted me to succeed				
Was positive about the job				
Was prepared to teach my OJT sessions				
Had a sense of humor				
Shared stories about his or her experiences				
Listened to my concerns about the job				
Explained things at a level I could understand				
Seemed comfortable with me				
Made me feel comfortable				

2. Check all the statements that reflect what you think about your OJT experience.

During My On-the-Job Training:

<input type="checkbox"/>	The information was given to me at about the right speed.
<input type="checkbox"/>	I had enough time to practice my new skills.
<input type="checkbox"/>	Other employees made me nervous.
<input type="checkbox"/>	I understood what I was supposed to learn.
<input type="checkbox"/>	Tools and equipment were always available for my training sessions.
<input type="checkbox"/>	I was comfortable asking questions.
<input type="checkbox"/>	It was OK to make mistakes.
<input type="checkbox"/>	I became confident I could do the job.

3. List three important things you learned about the job or equipment during your OJT.



*Delivering on the Nation's promise:
Safety and health at work for all people
through research and prevention*

For information about occupational safety and health topics contact NIOSH at:

1-800-35-NIOSH (1-800-356-4674)
Fax: 513-533-8573
E-mail: pubstaft@cdc.gov
www.cdc.gov/niosh

SAFER • HEALTHIER • PEOPLE™

DHHS (NIOSH) Publication No. 2005-146