Coaching Skills for On-the-Job Trainers
Information Circular 9479

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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
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COACHING SKILLS FOR ON-THE-JOB TRAINERS

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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.

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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)
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)—

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

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.

<table>
<thead>
<tr>
<th>Focus</th>
<th>Type of Evaluation</th>
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</thead>
<tbody>
<tr>
<td>The program</td>
<td>• Overview conducted by program champion</td>
</tr>
<tr>
<td>Supervisors</td>
<td>• Self-assessment</td>
</tr>
<tr>
<td></td>
<td>• Champion review</td>
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<tr>
<td></td>
<td>• Trainee assessment</td>
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<tr>
<td>Coaches</td>
<td>• Self-assessment</td>
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<tr>
<td></td>
<td>• Supervisor review</td>
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<tr>
<td></td>
<td>• Trainee assessment</td>
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<tr>
<td>Trainees</td>
<td>• Pre-assessment</td>
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<tr>
<td></td>
<td>• Self-assessment</td>
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<tr>
<td></td>
<td>• Trainer progress reviews</td>
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<tr>
<td></td>
<td>• Supervisor sign-off evaluation</td>
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<td></td>
<td>• Follow-up review</td>
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</table>
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**


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

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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

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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.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
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<tbody>
<tr>
<td>Welcome and Introductions</td>
<td>20 minutes</td>
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<tr>
<td>Unit 1: What is a Coach?</td>
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<tr>
<td>▪ Successful Coaching</td>
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<tr>
<td>▪ Coaching Readiness Self-Assessment</td>
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<tr>
<td>▪ Characteristics of a Good Coach</td>
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<td>▪ WIIFM</td>
<td>40 minutes</td>
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<td>Unit 2: The Coach/Trainee Relationship</td>
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<tr>
<td>▪ Establishing a Relationship</td>
<td></td>
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<tr>
<td>▪ Effective Communication</td>
<td></td>
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<tr>
<td>▪ Responsibilities</td>
<td>50 minutes</td>
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<tr>
<td>Unit 3: Coaching Adults</td>
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<tr>
<td>▪ Characteristics of Adult Learners</td>
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<tr>
<td>▪ Experience and Learning</td>
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<tr>
<td>▪ Effective Coaching</td>
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<td>▪ Effective Assessment</td>
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<tr>
<td>▪ Coaching Checklist</td>
<td></td>
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<tr>
<td>▪ Steps to Successful Coaching</td>
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<tr>
<td>Unit 4: Preparing a Training Outline</td>
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<td>Unit 5: Coaching Practice</td>
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<tr>
<td>▪ Practice Coaching Activity</td>
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<tr>
<td>▪ Coaching to Different Skill Levels Activity</td>
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<tr>
<td>Unit 6: Wrap-up</td>
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<tr>
<td>▪ Review of the Day</td>
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<tr>
<td>▪ Workshop Wrap-up</td>
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<tr>
<td>▪ On-the-Job Coaching Session Preparation</td>
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<tr>
<td>▪ Your Next Steps</td>
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<tr>
<td>▪ Coaching Readiness Self-Assessment</td>
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<tr>
<td>▪ Workshop Expectations</td>
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<tr>
<td>▪ Coaching Skills Workshop Evaluation</td>
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<td>1 hour</td>
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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.
**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

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**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 workplace.

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.
Microsoft Power Point\textsuperscript{2} 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?

<table>
<thead>
<tr>
<th></th>
<th>Group 1</th>
<th>Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very relevant</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Somewhat relevant</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mostly irrelevant</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Totally irrelevant</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Group 1</th>
<th>Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Difficult</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Too difficult</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

\textsuperscript{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?

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Excellent
Good
Average
Poor

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

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Excellent
Good
Average
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.
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.

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.

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.

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:
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.

Fun Facts:

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.

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.

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.

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.
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)
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:
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.

**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.
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

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 Devens LEFT
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.
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**.

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**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?"

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**Translate Closed-Ended Questions to Open-Ended Questions Activity**

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**Giving Feedback**
- The purpose of feedback is
  - To reinforce corrections
  - To point out actions that need to be corrected through further practice
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.
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.
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.

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.

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.

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.

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

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.

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

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:
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.

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.

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 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 – 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.

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.
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 competed 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.
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.
Coaching Skills Workshop for On-the-Job Training
Learning Curves

- Variability A
- Variability B

Acceptable Performance

"Following Joe Around"
On-the-Job Experience

Structured On-the-Job Training
& Coaching

Time

Proficiency
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
WI IFM?
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

C
ommunication
ollaboration
ommitment
Effective Communication

1. Exchange Information
2. Ensure Understanding
3. Establish Trust and Belief
4. Commitment to Action
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

- Problem-centered
- Goal-oriented
- Self-directed
- Experience-based
- Practical
Adult Learners Activity
Cone of Learning

- Read: 10%
- Hear: 20%
- See: 30%
- Hear and See: 50%
- Say: 70%
- Say and Do: 90%
Effective Coaching

- Clear Goals
- Valid Content
- Appropriate Delivery Method
- Assessment
- Remediation
Effective Coaching Activity
Effective Assessment

- Perform
- Question
- Demonstrate
- Answer
- Describe
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

(05/19/2005)
# Coaching Skills Workshop Plan

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preclass Reading: &quot;On Teaching and Learning&quot;</td>
<td>Handout</td>
<td>Before Class</td>
</tr>
<tr>
<td>Welcome and Introductions</td>
<td></td>
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<tr>
<td>Key Speaker</td>
<td></td>
<td>8:00–8:20</td>
</tr>
<tr>
<td>Prereading Overview</td>
<td>ii</td>
<td></td>
</tr>
<tr>
<td>What Do You Expect?</td>
<td>iii</td>
<td></td>
</tr>
<tr>
<td>OJT Coaching Preassessment</td>
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<tr>
<td>Unit 1: What is a Coach?</td>
<td></td>
<td>8:20–9:00</td>
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<tr>
<td>Successful Coaching</td>
<td>1–3</td>
<td></td>
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<tr>
<td>Coaching Readiness Self-Assessment</td>
<td>1–5</td>
<td></td>
</tr>
<tr>
<td>Characteristics of a Good Coach</td>
<td>1–7</td>
<td></td>
</tr>
<tr>
<td>WIIFM</td>
<td>1–11</td>
<td></td>
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<tr>
<td>Unit 2: The Coach/Trainee Relationship</td>
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<td>9:00–9:50</td>
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<tr>
<td>Establishing a Relationship</td>
<td>2–3</td>
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<tr>
<td>Effective Communication</td>
<td>2–5</td>
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<tr>
<td>Listening Skills</td>
<td>2–7</td>
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<tr>
<td>Asking Good Questions</td>
<td>2–8</td>
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<tr>
<td>Giving Feedback</td>
<td>2–12</td>
<td></td>
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<tr>
<td>Communication Skills Summary</td>
<td>2–15</td>
<td></td>
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<tr>
<td>Responsibilities</td>
<td>2–17</td>
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<tr>
<td>BREAK</td>
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<td>9:50–10:00</td>
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<tr>
<td>Unit 3: Coaching Adults</td>
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<td>10:00–10:50</td>
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<tr>
<td>Characteristics of Adult Learners</td>
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<td>Experience and Learning</td>
<td>3–5</td>
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<tr>
<td>Effective Coaching</td>
<td>3–6</td>
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<tr>
<td>Effective Assessment</td>
<td>3–9</td>
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<td>Coaching Checklist</td>
<td>3–10</td>
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<td>Steps to Successful Coaching</td>
<td>3–15</td>
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<td>BREAK</td>
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<td>Unit 4: Preparing a Training Outline</td>
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<td>Preparing a Training Outline Activity</td>
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<tr>
<td>Part I: Job Steps</td>
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<tr>
<td>Part II: Group and Order of Steps</td>
<td>4–6</td>
<td></td>
</tr>
<tr>
<td>Part III: Important Considerations</td>
<td>4–9</td>
<td></td>
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<tr>
<td>LUNCH</td>
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<td>12:00–12:45</td>
</tr>
<tr>
<td>Unit 5: Coaching Practice</td>
<td></td>
<td>12:45 – 2:30</td>
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<tr>
<td>Practice Coaching Activity</td>
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<tr>
<td>BREAK</td>
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<td>2:30 – 2:45</td>
</tr>
<tr>
<td>Coaching to Different Skill Levels Activity</td>
<td>5–15</td>
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</tr>
<tr>
<td>Unit 6: Wrap–up</td>
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<td>2:45 – 3:00</td>
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<tr>
<td>Review of the Day</td>
<td>6–3</td>
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<tr>
<td>Coaching Support</td>
<td>6–4</td>
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<tr>
<td>On–the–Job Coaching Session Preparation</td>
<td>6–5</td>
<td></td>
</tr>
<tr>
<td>Your Next Steps</td>
<td>6–6</td>
<td></td>
</tr>
<tr>
<td>Coaching Readiness Self–Assessment</td>
<td>6–7</td>
<td></td>
</tr>
<tr>
<td>Workshop Expectations</td>
<td>6–9</td>
<td></td>
</tr>
<tr>
<td>Coaching Skills Workshop Evaluation</td>
<td>6–11</td>
<td></td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Specific Task, Skill, or Job</th>
<th>Classroom</th>
<th>OJT</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Why Structure On-The-Job Training?

![Graph showing the relationship between proficiency and time with differentiated training methods.

- Acceptable Performance
- Variability A
- Variability B

Curves labeled:
- "Following Joe Around" On-the-Job Experience
- Structured On-the-Job Training & Coaching

Time axis:
- Proficiency axis
Unit 1
What Is a Coach?
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.
# 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."

<table>
<thead>
<tr>
<th>Box 1</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare for each coaching session.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Teach tasks according to company standards.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Check for trainee understanding.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 2</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer many questions from a trainee.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Be interested in the success of a new trainee.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Ask the trainee questions to direct the learning process.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 3</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show a trainee what I like about the job.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Be excited about coaching.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Avoid making negative comments.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 4</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laugh when training doesn’t go according to plan.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Share stories about things I’ve learned the hard way.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 5</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admit to a trainee when I don’t know the answer.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Address a trainee’s concerns about the job.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 6</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adapt lessons to the abilities of a trainee.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Change coaching sessions to meet new constraints.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 7:</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to a trainee’s opinions about doing a job.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Be open to negative comments.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Work with a trainee who is not like me.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 8:</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in training to improve my coaching skills.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Use my supervisor’s reviews to improve my coaching skills.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Take my position as a coach seriously.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Box 1: Desire</th>
<th>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.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Box 2: Responsiveness</th>
<th>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.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Box 3: Enthusiasm</th>
<th>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.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Box 4: Humor</th>
<th>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.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Box 5: Sincerity/Honesty</th>
<th>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.</th>
</tr>
</thead>
</table>

| 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. |
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.
WIIFM?

WIIFM (What’s in it for me?)

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

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_____________________________________________________________
Unit 2
The Coach/Trainee Relationship
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.
Effective Communication

The Communication Process

1. Exchange Information
2. Ensure Understanding
3. Establish Trust and Belief
4. Commitment to Action

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.
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
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.

<table>
<thead>
<tr>
<th>Characteristics of Adult Learners</th>
<th>Coaching Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-directed</td>
<td>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.</td>
</tr>
<tr>
<td>Experience-based</td>
<td>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.</td>
</tr>
<tr>
<td>Practical</td>
<td>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.</td>
</tr>
<tr>
<td>Problem-centered</td>
<td>Adults learn from real life examples. Show the trainee how new knowledge and skills can be applied to solving work problems.</td>
</tr>
<tr>
<td>Goal-oriented</td>
<td>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.</td>
</tr>
</tbody>
</table>
Adult Learners Activity

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

<table>
<thead>
<tr>
<th>Characteristics of adult learners</th>
<th>Coaching strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-directed</td>
<td></td>
</tr>
<tr>
<td>Experience-based</td>
<td></td>
</tr>
<tr>
<td>Practical</td>
<td></td>
</tr>
<tr>
<td>Problem-centered</td>
<td></td>
</tr>
<tr>
<td>Goal-oriented</td>
<td></td>
</tr>
</tbody>
</table>
Experience and Learning

Cone of Learning

Tend to Remember…
Involvement

10% of what we read.

20% of what we hear.

30% of what we see.

50% of what we hear and see.

70% of what we say.

90% of what we both say and do.

Reading
Hearing Words
Looking at Pictures
Watching a Movie
Looking at an Exhibit
Watching a Demonstration
Seeing It Done on Location
Participating in a Discussion
Giving a Talk
Doing a Dramatic Presentation
Simulating the Real Experience
Doing the Real Thing

Our Level of

Verbal receiving

Visual receiving

Receiving and participating

Doing

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

<table>
<thead>
<tr>
<th>Components</th>
<th>Coaching Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear goals</td>
<td>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.”</td>
</tr>
<tr>
<td>Valid content</td>
<td>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.</td>
</tr>
<tr>
<td>Appropriate delivery method</td>
<td>&quot;Delivery method&quot; 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.</td>
</tr>
<tr>
<td>Assessment</td>
<td>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.</td>
</tr>
<tr>
<td>Remediation</td>
<td>Remediation provides an opportunity for the trainee to correct his or her mistakes and practice doing the task(s) correctly.</td>
</tr>
</tbody>
</table>
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
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.

<table>
<thead>
<tr>
<th>Coach’s Name:</th>
<th>Observer’s Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Skill Taught:</td>
<td>Evaluation Date:</td>
</tr>
</tbody>
</table>

**Step 1 –Focus:** Establish rapport, communicate your expectations, and find out what the trainee can do

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greet trainee</td>
<td>Shake hands, maintain eye contact, and put trainee at ease.</td>
<td></td>
</tr>
<tr>
<td>Determine what trainee knows</td>
<td>Ask questions to establish level of knowledge or experience.</td>
<td></td>
</tr>
<tr>
<td>Encourage questions</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Share an overview of the job to be taught</td>
<td>Provide a copy of the module you and trainee will be using to guide training.</td>
<td></td>
</tr>
<tr>
<td>Discuss training safety considerations</td>
<td>Ensure that trainee will be able to observe safely during demonstrations. Discuss other safety considerations.</td>
<td></td>
</tr>
</tbody>
</table>
Coaching Checklist

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2 – <strong>Explain and demonstrate</strong>: Explain the steps of the job, explain why these steps are important, and demonstrate them</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Explain the step(s) of job skill</td>
<td>Give only the amount of information trainee can learn in one pass. Do not overwhelm.</td>
<td></td>
</tr>
<tr>
<td>☐ Explain why, when, and how each step is important</td>
<td>Be sure job steps make sense to trainee. Ask questions to check understanding.</td>
<td></td>
</tr>
<tr>
<td>☐ Demonstrate how to do the job step(s)</td>
<td>Show trainee a safe observation location. Ask questions to determine knowledge and understanding before moving to next job step.</td>
<td></td>
</tr>
<tr>
<td>☐ Encourage questions</td>
<td>Emphasize trainee should ask questions when unclear or uncertain.</td>
<td></td>
</tr>
</tbody>
</table>

**Step 3 – Observe**: Have trainee explain and demonstrate what coach presented in step 2

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Have trainee verbally walk through step(s)</td>
<td>Trainee explains the job (why, where, when, how, and any safety considerations) <strong>before demonstrating</strong> any part of it. – They <strong>know it</strong>.</td>
<td></td>
</tr>
<tr>
<td>☐ Select a safe observation location</td>
<td>Be sure you can safely observe the entire demonstration.</td>
<td></td>
</tr>
<tr>
<td>☐ Have trainee explain each step and <strong>then</strong> demonstrate it</td>
<td>Trainee tells what will be done just <strong>before performing</strong> each job step– They <strong>know and can do it</strong>.</td>
<td></td>
</tr>
<tr>
<td>☐ Observe trainee demonstrating job</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Coaching Checklist

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 4 – Feedback:</strong> Coach and trainee discuss performance in step 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Ask trainee to do a self-assessment</td>
<td>Ask trainee to communicate perceptions of performance. This encourages trainees to discuss task and helps resolve issues.</td>
<td></td>
</tr>
<tr>
<td>☐ Give feedback on performance</td>
<td>Point out strengths and areas that need improvement or practice.</td>
<td></td>
</tr>
<tr>
<td>☐ Assess your coaching progress</td>
<td>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?</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>✓</th>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Establish trainee’s readiness for evaluation</td>
<td>Prepare trainee by checking on level of comfort and readiness. Observe and ask questions. Create a win-win situation.</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Make arrangements for evaluation</td>
<td>Schedule with appropriate people. Make sure evaluator has evaluation checklist (often made from the training outline).</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Based on outcome of evaluation, consider the next steps</td>
<td>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.</td>
<td></td>
</tr>
</tbody>
</table>

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
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.
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.

<table>
<thead>
<tr>
<th>Job: Change a tire</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group</strong></td>
</tr>
<tr>
<td>Preparing</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Each team will report their outline to the class. Teams may change their outlines after the reports are given.
### Preparing a Training Outline Activity

<table>
<thead>
<tr>
<th>Job:</th>
<th>Group</th>
<th>Job Steps and Substeps</th>
<th>Coaching Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Job: Change a tire</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group</strong></td>
</tr>
</tbody>
</table>
| 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 |
Unit 5
Coaching Practice
**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.
## Practice Coaching Activity

<table>
<thead>
<tr>
<th>Job:</th>
<th>Group</th>
<th>Job Steps and Substeps</th>
<th>Coaching Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Specific task, skill, or job</th>
<th>Classroom</th>
<th>OJT</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

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**

- [ ] Was prepared for the session
- [ ] Taught tasks according to company standards
- [ ] Checked for trainee understanding

Briefly note what you observed.

**Box 2: Responsiveness**

- [ ] Patiently answered the trainee’s questions
- [ ] Seemed to want this trainee to succeed
- [ ] Asked questions to direct the learning process

Briefly note what you observed.

**Box 3: Enthusiasm**

- [ ] Was positive about the job
- [ ] Avoided negative comments

Briefly note what you observed.

**Box 4: Humor**

- [ ] Kept his or her sense of humor
- [ ] 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**
- Admitted that he or she didn’t know something
- Seemed to care about the trainee

Briefly note what you observed.

**Box 6: Flexibility**
- Matched the training to the ability of the trainee
- Changed the teaching session to match some constraint

Briefly note what you observed.

**Box 7: Tolerance**
- Was open to the opinions of the trainee
- Seemed comfortable with the trainee

Briefly note what you observed.

**Box 8: Commitment**
- 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—

<table>
<thead>
<tr>
<th>More training</th>
<th>More practice</th>
<th>On this specific task or skill</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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</tr>
</tbody>
</table>

- [ ] 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.

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

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

**During My On-the-Job Training:**

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

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:

<table>
<thead>
<tr>
<th>Specific task, skill, or job</th>
<th>Classroom</th>
<th>OJT</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Trainee needs the following training before starting this OJT program:
Unit 6
Wrap-up
### Review of the Day

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

<table>
<thead>
<tr>
<th>Box 1:</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare for each coaching session</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
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<td>Teach tasks according to company standards</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Check for trainee understanding</td>
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<table>
<thead>
<tr>
<th>Box 2:</th>
<th>Challenging</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Answer many questions from a trainee</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Be interested in the success of a new trainee</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Ask the trainee questions to direct the learning process</td>
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<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Box 3:</th>
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<tbody>
<tr>
<td>Show a trainee what I like about the job</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Be excited about coaching</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Avoid making negative comments</td>
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<tr>
<th>Box 4:</th>
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<tr>
<td>Laugh when training doesn’t go according to plan</td>
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<tr>
<td>Admit to a trainee when I don’t know an answer</td>
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<td>Address a trainee’s concerns about the job</td>
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<table>
<thead>
<tr>
<th>Box 6:</th>
<th>Challenging</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Adapt lessons to the abilities of a trainee</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Change coaching sessions to meet new constraints</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Box 7:</th>
<th>Challenging</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to trainee’s opinions about doing the job</td>
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<td>Be open to negative comments</td>
<td>1 2 3 4 5 6</td>
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<tr>
<td>Work with a trainee who is not like me</td>
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<table>
<thead>
<tr>
<th>Box 8:</th>
<th>Challenging</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Participate in training to improve my coaching skills</td>
<td>1 2 3 4 5 6</td>
<td></td>
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<td>Use my supervisor’s reviews to improve my coaching skills</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Take my position as a coach seriously</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>
**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?
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

<table>
<thead>
<tr>
<th>How relevant was the training for you?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Very relevant</td>
</tr>
<tr>
<td>□ Somewhat relevant</td>
</tr>
<tr>
<td>□ Mostly irrelevant</td>
</tr>
<tr>
<td>□ Totally irrelevant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How easy was the training to follow?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Very easy</td>
</tr>
<tr>
<td>□ Somewhat easy</td>
</tr>
<tr>
<td>□ Difficult</td>
</tr>
<tr>
<td>□ Too difficult</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How would you describe the quality of the training materials?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Excellent</td>
</tr>
<tr>
<td>□ Good</td>
</tr>
<tr>
<td>□ Average</td>
</tr>
<tr>
<td>□ Poor</td>
</tr>
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<table>
<thead>
<tr>
<th>How do you rate the delivery of the training?</th>
</tr>
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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 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

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<td>Take my position as a coach seriously</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Job:</td>
<td>Group</td>
<td>Job Steps/Substeps</td>
</tr>
<tr>
<td>--------</td>
<td>-------</td>
<td>--------------------</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Coaching Training Outline (page _____)

<table>
<thead>
<tr>
<th>Job:</th>
<th>Group</th>
<th>Job Steps/Sub-Steps</th>
<th>Coaching Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Coach’s Name:</th>
<th>Observer’s Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Skill Taught:</th>
<th>Evaluation Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 1 –Focus:** Establish rapport, communicate your expectations, and find out what the trainee can do

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greet trainee</td>
<td>Shake hands, maintain eye contact, and put trainee at ease.</td>
<td></td>
</tr>
<tr>
<td>Determine what trainee knows</td>
<td>Ask questions to establish level of knowledge or experience.</td>
<td></td>
</tr>
<tr>
<td>Encourage questions</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Share an overview of the job to be taught</td>
<td>Provide a copy of the module you and trainee will be using to guide training.</td>
<td></td>
</tr>
<tr>
<td>Discuss training safety considerations</td>
<td>Ensure that trainee will be able to observe safely during demonstrations. Discuss other safety considerations.</td>
<td></td>
</tr>
</tbody>
</table>
## Coaching Checklist

### Step 2 – Explain and demonstrate:
Explain the steps of the job, explain why these steps are important, and demonstrate them

<table>
<thead>
<tr>
<th>Thing to do</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explain the step(s) of job skill</td>
<td>Give only the amount of information trainee can learn in one pass. Do not overwhelm.</td>
<td></td>
</tr>
<tr>
<td>Explain why, when, and how each</td>
<td>Be sure job steps make sense to trainee. Ask questions to check understanding.</td>
<td></td>
</tr>
<tr>
<td>step is important</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demonstrate how to do the job</td>
<td>Show trainee a safe observation location. Ask questions to determine knowledge and understanding before moving to next job step.</td>
<td></td>
</tr>
<tr>
<td>step(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encourage questions</td>
<td>Emphasize trainee should ask questions when unclear or uncertain.</td>
<td></td>
</tr>
</tbody>
</table>

### Step 3 – Observe:
Have trainee explain and demonstrate what coach presented in step 2

<table>
<thead>
<tr>
<th>Thing to do</th>
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<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have trainee verbally walk</td>
<td>Trainee explains the job (why, where, when, how, and any safety considerations) <strong>before</strong></td>
<td></td>
</tr>
<tr>
<td>through step(s)</td>
<td><strong>demonstrating</strong> any part of it. – They <strong>know</strong> it.</td>
<td></td>
</tr>
<tr>
<td>Select a safe observation</td>
<td>Be sure you can safely observe the entire demonstration.</td>
<td></td>
</tr>
<tr>
<td>location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have trainee explain each step</td>
<td>Trainee tells what will be done just <strong>before</strong></td>
<td></td>
</tr>
<tr>
<td>and <strong>then</strong> demonstrate it</td>
<td><strong>performing</strong> each job step– They <strong>know and can do it.</strong></td>
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<tr>
<td>Observe trainee demonstrating job</td>
<td></td>
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</tbody>
</table>
## Coaching Checklist

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 4 – Feedback:</strong> Coach and trainee discuss performance in step 3</td>
<td></td>
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<tr>
<td>✅ Ask trainee to do a self-assessment</td>
<td>Ask trainee to communicate perceptions of performance. This encourages trainees to discuss task and helps resolve issues.</td>
<td></td>
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<tr>
<td>✅ Give feedback on performance</td>
<td>Point out strengths and areas that need improvement or practice.</td>
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<tr>
<td>✅ Assess your coaching progress</td>
<td>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?</td>
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</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Things to do:</th>
<th>Guidelines</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish trainee’s readiness for evaluation</td>
<td>Prepare trainee by checking on level of comfort and readiness. Observe and ask questions. Create a win-win situation.</td>
<td></td>
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<tr>
<td>Make arrangements for evaluation</td>
<td>Schedule with appropriate people. Make sure evaluator has evaluation checklist (often made from the training outline).</td>
<td></td>
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<tr>
<td>Based on outcome of evaluation, consider the next steps</td>
<td>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.</td>
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</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Specific task, skill, or job</th>
<th>Classroom</th>
<th>OJT</th>
<th>Other</th>
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<tbody>
<tr>
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</table>

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

☐ Was prepared for the session
☐ Taught tasks according to company standards
☐ Checked for trainee understanding

Briefly note what you observed.

Box 2: Responsiveness

☐ Patiently answered the trainee’s questions
☐ Seemed to want this trainee to succeed
☐ Asked questions to direct the learning process

Briefly note what you observed.

Box 3: Enthusiasm

☐ Was positive about the job
☐ Avoided negative comments

Briefly note what you observed.

Box 4: Humor

☐ Kept his or her sense of humor
☐ 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**
- ☐ Admitted that he or she didn’t know something
- ☐ Seemed to care about the trainee
Briefly note what you observed.

**Box 6: Flexibility**
- ☐ Matched the training to the ability of the trainee
- ☐ Changed the teaching session to match some constraint
Briefly note what you observed.

**Box 7: Tolerance**
- ☐ Was open to the opinions of the trainee
- ☐ Seemed comfortable with the trainee
Briefly note what you observed.

**Box 8: Commitment**
- ☐ 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—

<table>
<thead>
<tr>
<th>More training</th>
<th>More practice</th>
<th>On this specific task or skill</th>
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</table>

☐ 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.

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

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

<table>
<thead>
<tr>
<th>During My On-the-Job Training:</th>
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<tbody>
<tr>
<td>The information was given to me at about the right speed.</td>
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<td>I had enough time to practice my new skills.</td>
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<tr>
<td>Other employees made me nervous.</td>
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<tr>
<td>I understood what I was supposed to learn.</td>
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<tr>
<td>Tools and equipment were always available for my training sessions.</td>
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<tr>
<td>I was comfortable asking questions.</td>
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<tr>
<td>It was OK to make mistakes.</td>
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<tr>
<td>I became confident I could do the job.</td>
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</tbody>
</table>

3. List three important things you learned about the job or equipment during your OJT.
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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: pubstaff@cdc.gov
www.cdc.gov/niosh

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