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DELIVERY GUIDE

## NOTE FOR Session 2

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Ideal timing: Be ready to send group to breakouts 30 minutes before end of class.

**You have a choice of: (pick one)**

1. Show the video on hidden slide 43 or Assign as Fieldwork,
2. Do a coach demo
3. neither of those things.

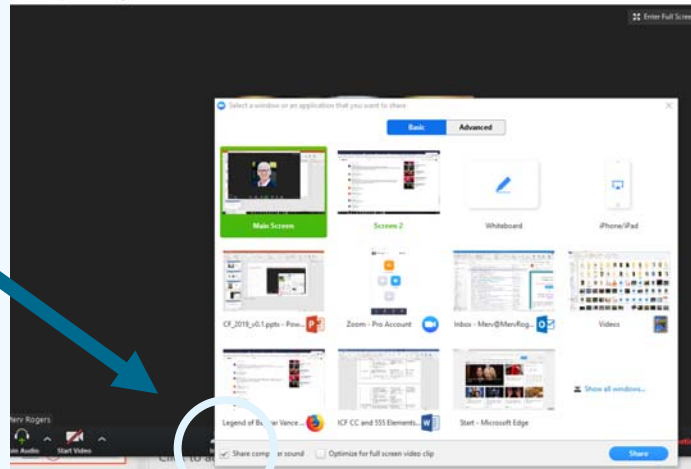
See slide 42 for more instructions



## DELIVERY GUIDE

### Note to Trainer.

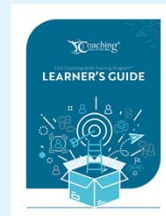
For this week's slides – be sure on your share tab "Share Computer Sound" is checked.



AUDIO IN THIS SECTION



## 5.5.5 Coaching Skills Training Program™



Welcome, we will start at top of the hour.

**Host: Trainer Name, XCC**



### **Welcome and Introduction**

- Have slide on screen when participants enter room and get settled.
- Welcome the participants

## THE 5 STEP COACHING EXCHANGE



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- Debrief Homework experience : What worked well?
- Reinforce it is a process.

DELIVERY GUIDE

## OPTIONAL

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- The next slide will show the COOTB Video automatically.
- It is hidden, select slide # 43 OR left click to unhide this slide in the deck.

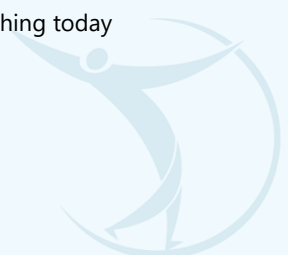
**6:28 MINUTE YOUTUBE VIDEOCLIP ON 'The 5 Step Coaching Exchange'**

Your choice:

- A)** to assign as homework, giving you more time for peer to peer coaching today
- The Coaching Exchange - The 5 Step Process
  - <https://vimeo.com/193411023/ec10be3110>

OR

- B)** conduct a short Coaching Demo



VIDEO

## THE 5 STEP COACHING EXCHANGE

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**Click: Imbedded Video, plays on click , in slide**

**6:28 MINUTE YOUTUBE VIDEOCLIP ON 'The 5 Step Coaching Exchange'**

The Coaching Exchange - The 5 Step Process

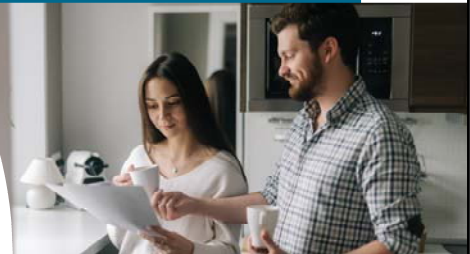


# SETTING THE COACHING AGREEMENT

The agreement between the coach and coachee sets the tone and the expectations of the coaching relationship.

***Definition: Partners with the client and relevant stakeholders to create clear agreements about the coaching relationship, process, plans and goals. Establishes agreements for the overall coaching engagement as well as those for each coaching session.***

- Formal
- Informal



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The exchange between the coach and coachee can happen in a variety of ways.

## **Formal Exchanges**

- Where the coach and coachee have a time and place set aside with the mutual understanding that coaching is going to happen.
- Formal coaching is usually an ongoing relationship where the coach and coachee meet repeatedly at predetermined intervals.
- The coach and coachee agree upon an overarching goal(s) to be met within the duration of the coaching term.
- At each meeting the coachee comes into the exchange with an agenda they would like to be coached on that is relative to the overarching goal(s).
- Formal coaching provides an opportunity for the coachee to work on large or a multitude of goals while they grow and develop over time with coachable themes changing at every meeting but always relative to the overarching goal(s).

## **Informal exchanges**

THE COACHING AGREEMENT MUST STILL BE SET-UP. Either formally or as the result of previous coaching/manager relationship or as simply as asking permission. Ex: "May I share my thoughts with you?" , "Would you be open to some feedback?", As a coach, I have a questions for you." AN AGREEMENT MUST BE IN PLACE or

#### ESTABLISHED.

- Providing coaching to a person who may not even know they are being coached is unethical.
- Can occur between a manager and direct report, peer-to-peer, or even direct report to manager.
- Occurs in what we call 'coachable moments' and can happen in the hallway, over lunch or even when someone pops their head in your office and asks, "Do you have a minute?"
- They are usually brief and can be continued if both parties agree.

Both types of exchanges, formal and informal, can happen in person, on the phone or sometimes even over email.

STEP ONE  
IDENTITY

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## THE 5 STEP COACHING EXCHANGE



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- This is where the coachee unpacks the situation, opportunity or challenge.
- Often during this part of the coaching exchange, the coachee is trying to convey an elaborate and complex situation that forms as a story.
- It is the coach's responsibility to move the 'story' forward into discovery, learning and action.
- After the coachee has unpacked the general overview of their coaching situation, the coach will need to let the coachee know, again with active listening skills, they are getting the contextual essence of what the coachee is trying to convey.
- With reflective listening and paraphrasing, the coach lets the coachee know they 'get it'.

## WHAT IS BEING IDENTIFIED

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- What the Coachee wants to accomplish and address.
- What they want or where they want to get to
- The gap between where they are now and where they want to go
- A succinct focus that is manageable within the timeframe you have to coach



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- While it is necessary to get a contextual idea of what is happening with the coachee, it is not necessary to know all the details.
- It's easy to get caught up in the story itself and miss the opportunity to move the coachee forward into action.
- As a busy leader your informal coaching exchanges may only be a few minutes long due to time constraints. So it is important to get the exchange moving forward quickly.
- Once the coach feels they have identified the contextual essence of the coachee's situation and the coach determines the coachee feels they have sufficiently conveyed their situation, the exchange enters into identifying a gap.
- This would be the gap between where the coachee is at the moment with the situation and where they would like to get to.
- This is done using active listening and clarifying questions, which are based on and build upon what the coach is hearing.
- Once the gap is identified, the coach then evokes a succinct focus and desired outcome for the coaching exchange from the coachee.
- That succinct focus will have to be manageable within the timeframe you have available for the exchange.

- That may mean the desired outcome might have to be reduced down to one small step forward versus completely solving a complicated situation or fully exploring and making a decision on an impending, complex choice to be made.

**→ Go to next slide which illustrates how to get to a succinct focus**

## FINDING A SUCCINCT FOCUS

"What is one thing that would be most helpful to focus on first?"

"Where should we begin?"

"I heard you say you didn't know where to start. If you had to guess, where do you think that would be?"

FOCUS  
ON  
WHAT  
MATTERS



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Focus on what matters for the coachee, the situation and the context of the conversation

From the larger context, focus in on one area the coachee would like to take action or move forward. In other words – make elephant steaks.

➔ Good spot for trainer to do a coaching demo with a participant where you demonstrate getting to a succinct focus only. You will continue on in this coaching session with this participant after you teach the other 4 Coaching Exchange Steps.

➔ In the demo you will simply highlight how you get someone focused on what they would very specifically like coaching on that is manageable in the timeframe you have. Once they've identified a succinct focus it's good to demonstrate asking "Now that we've identified that, what would you like to walk away from this conversation with?" and stop the demo after they answer that (resume the demo where you left off after you finish teaching the rest of the Coaching Exchange Steps)

➔ Debrief the demo and ask what they saw around

- Listening
- Questioning
- Getting them down to a succinct focus

# STEP ONE

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## Identify

- Identify WHAT they want to accomplish.
- Identify the gap between where they are and where they want to be.
- Determine a succinct focus for the time you have.
- Listening is the core coaching skill used most.



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Summary of key learning



STEP TWO  
DISCOVER



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# THE 5 STEP COACHING EXCHANGE



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- The coach and the coachee learn more about the coachee relative to the situation they are being coached on.
- This is where the coachee will reframe and reorganize their thinking if needed.
- The dialogue moves beyond the story, the goal, desired results and current behaviour into what is below the surface level.
- The coachee gains deeper and broader understanding of themselves and their situation to arrive at a point of clarity and direction.
- In Step 2 the aim is for the coach, and more importantly the coachee, to learn more about themselves relative to the situation they are being coached on and to reframe and reorganize their thinking if needed.
- This is where the coach heads beyond the obvious and into the more invisible areas of emotions, motivations and thinking.
- The Core Skills of Listening and Questioning are used primarily in Discovery.
- The coach must increase the depth of their listening in this step as the coachee begins to reveal important information that has a large impact on the overall success in attaining their goals.
- Questions need to be well crafted to encourage the coachee to dig below the surface and into what is not being said or expressed up until that point.



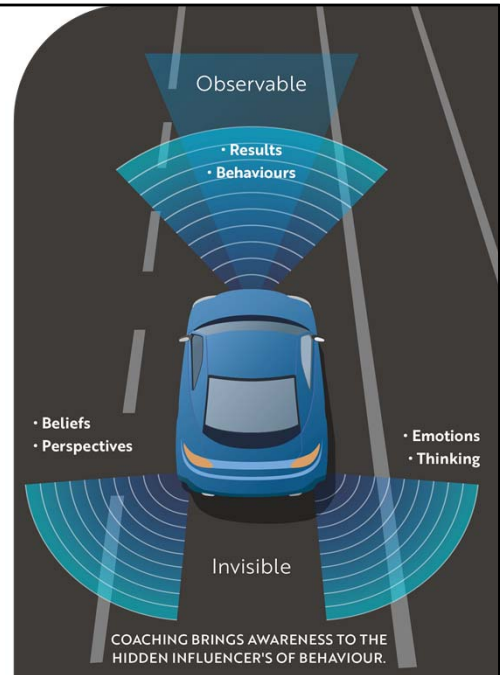
# DISCOVER

## Observable

- Results
- Goals
- Behaviours

## Invisible

- Beliefs
- Emotions
- Thinking
- Perceptions



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The coach acts as an exploration partner and begins to ask mostly clarifying and self-awareness questions to learn more about one or more of the following:

### Explore and Learn From Emotions

- How the coachee feels about the situation, the goal, the individuals involved or anything else relevant.
- It is an exploration of emotions with the objective to have the coachee connect with what they are actually feeling about things and to use those feelings as a guide to understanding more.

### Examine and Expand Beliefs

- What the coachee believes about the situation, the goal, the individuals involved or themselves.
- Beliefs are a powerful force that strongly influence behaviors, choices and the success of outcomes.
- Often beliefs are based on opinions and other unsubstantiated information.
- As coaches we examine, and sometimes challenge a coachee's beliefs to assure the coachee is informed and influenced by as much fact and real evidence as they can gather.

**Broaden Perspectives**

- Closely aligned with, but distinctive from beliefs, are perceptions.
- In the process of discovery, the coach aims to help the coachee broaden their perceptions.
- This means that the coach listens for where the coachee may be limiting themselves to a narrow view of a situation, their goal, the individuals involved or themselves.
- The coach asks questions that invite the coachee to look beyond the obvious and into a broader or wider way of thinking.
- It is important the coach does not lead or direct the coachee into their way of thinking. Instead, the coach teaches the coachee with powerful, open-ended questions, that they can think beyond the obvious and into a deeper, more profound wisdom the coachee already possesses.

**For New Ways of Thinking**

- Based on the exploration around feelings, beliefs and perspectives, the coach checks to see where the coachee's thinking is after new discoveries have been made.
- Through active listening during the exploration(s), the coach captures and reflects back any new thinking they may have heard from the coachee.
- The coachee will either agree with, correct and make adjustments to or reframe what the coach has said to what they feel is correct.

## THE COACH AND COACHEE DISCOVER TOGETHER

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- Challenges
- Motivations
- Fears
- Prejudices
- Limiting beliefs
- Assumptions
- Attitudes



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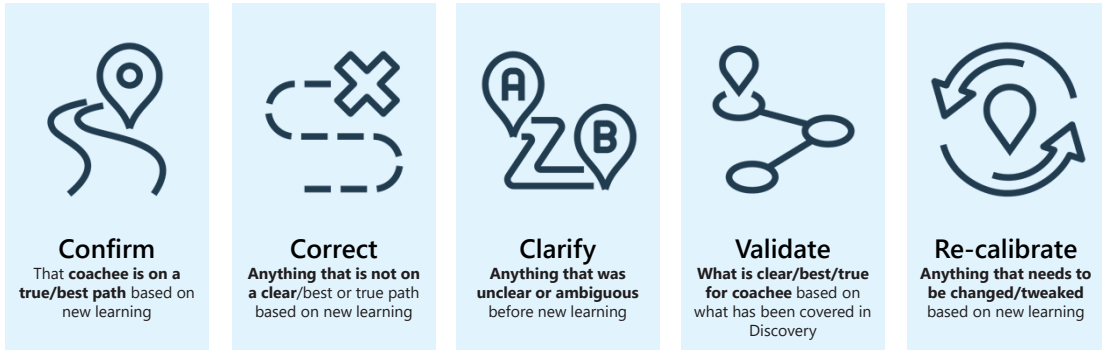
### **Discuss**

A multitude of things happen in the coaching exchange.

- The exchange is where the coach and coachee get clear about what the coachee wants from the coaching or the conversation.
- It is also where ideas are explored as the coachee begins to unpack the coachable theme and throughout the exchange.
- New information is brought to the surface and possibilities are seeded and grown.
- New choices get made and new directions are often forged by the coachee as their perspectives are broadened having learned more just by having the exchange.
- And finally, it is where obstacles get cleared out of the way for the coachee to move forward.

## IN DISCOVERY COACH AND COACHEE

The coach then takes what has been learned and together,  
**the coach and coachee do one or more of the following** based on what's been learned in Discovery:



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The coach then takes what has been learned and together, the coach and coachee do one or more of the following relative to best direction, course of action, appropriateness of the goal or desired outcome based on what's been learned in Discovery:

**Confirm:** That coachee is on true/best path based on new learning

**Correct:** Anything that is not clear/best or true path based on new learning

**Clarify:** Anything that was unclear or ambiguous before new learning

**Validate:** What is clear/best/true for coachee based on what has been covered in Discovery

**Re-calibrate:** Anything that needs to be changed/tweaked based on new learning.

It is important for the coach to be a true and trusted exploration partner in Discovery, always holding the coachee to be resourceful and able to learn from what is below the surface.





## STEP TWO

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### Discover

- Discovery sets the foundation for what the coaching is about.
- The coach and coachee discover together, as exploration partners.
- In discovery the coach and coachee ensure things are clear and on course.
- Listening and Questioning are the core coaching skills used most.



## THE 5 STEP COACHING EXCHANGE



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- The primary objective of the 5 Step Coaching Exchange is to move the coachee forward and into action in some way.
- This may be just a baby-step forward or, in some instances, a quantum leap.
- In the coaching exchange the measurement of efficacy is by quality, not quantity of that movement.
- To determine this we ask, is the coachee moving forward towards their desired goal or outcome in the most productive and least resistant way?



The coach and the coachee have identified the focus for the coaching and clarified the gap. (IDENTIFY)

In addition, the coachee has learned more about themselves and their situation and they are now ready to move forward. (DISCOVER)

This is the time to build a strategy bridge.

In this step, the coach and coachee partner to plan out the details that will enable the coachee to bridge the gap from where they are to where they want to get to in the easiest, shortest way.

The conversation shifts from learning to doing and things move above the waterline where the focus turns to solidifying actions and attaining results by mapping the path of least resistance.

Not all strategies are filled with details and measurable results. Going back to Part Three in this Learning Guide and the Core Coaching Skill of Action Planning, we looked at three types of actions:

t Tangible      t Discovery and Learning      t Evolutionary

2 and 3 may only require part of the bridge built minus the more concrete, measurable steps. Your discernment is necessary for what parts are appropriate

## THE 5 STEP COACHING EXCHANGE



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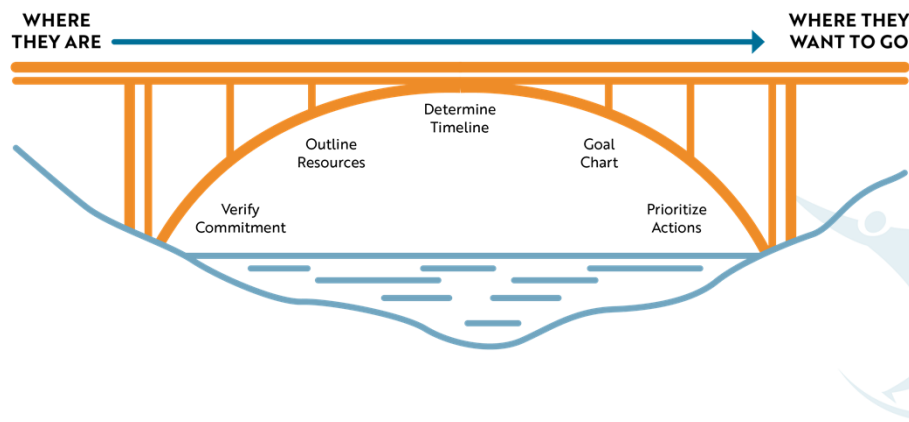
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# HOW TO BUILD A STRATEGY BRIDGE



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Building a strategy bridge signifies a commitment to move forward and take action. It is where plans get made, details are discussed and tactics are weighed and measured. This step requires the coach to use the Core Coaching Skills of listening, questioning and action planning.

There are five components to building the strategy bridge.

## 1. Verify Commitment

The coach will clarify what the coachee is actually committing to and will check to see the level of commitment the coachee has. The coach will be listening for any lack of clarity, hesitation or uncertainty. Some questions the coach may ask in this component are:

- In one sentence, what is your objective?
- Are you fully committed to \_\_\_\_\_?
- Did I just hear some uncertainty? What's that about?

## 2. Outline Resources

The coach ensures that the coachee has the resources needed to accomplish what they want successfully. Resources can be tangible such as the right people, the right place/space, the correct tools, etc. Or they can be intangible such as time, advocates

or methods of influence. The coach is listening for what may be missing or under or overestimated in this component. Some questions that may get asked are:

- What are the resources you'll need to accomplish this?
- Who can help with that?
- What is needed for this to be successful?

### **3. Determine Timeline**

The coach and coachee will work together to determine a doable timeline that will ensure success. The coach will be listening for possible over-commitment or underestimation of how long something may take. Only the coachee knows for sure what they are capable of, but it is appropriate for the coach to check in on things that may sound off. The coach can introduce the notion of under-promising and over-delivering in this component.

Some questions the coach may ask in determining the timeline are:

- When will you begin / achieve / deliver / complete \_\_\_\_?
- Is that a realistic timeframe?
- When you say you can get this done by \_\_\_\_\_, are you accounting for the unexpected things that may come up along the way and building in some extra time?
- Do know for sure what people's expectations are for this to be completed?

### **4. Goal Chart**

Visual representations of the goal and the strategy around it are a wonderful coaching tool for more complex plans. A goal chart should capture all the moving parts of the strategy into an easy to glance at visual where the coachee can actively chart their progress as they move along their timeline. Some questions that the coach may ask to help the coach create the most helpful goal chart for themselves are:

- What would be the most helpful things for you to see quickly to know you are on target?
- How will you gauge where you are in the process?
- How will you know you are on track?
- What will be the evidence you have achieved your objective?

### **5. Prioritize Actions**

The coach and coachee will work together to sort out what the highest priority actions are in the strategy. This may shift and change as the strategy bridge is built. The coach may need to dig deep with questions to help the coachee organize competing priorities in the process. Again, the coach is listening for uncertainty and lack of clarity around what actions come first. Some questions the coach may ask are:

- What comes first?
- Which action, if completed before the others, will make the others easier?

It is important to know that the five components can take place in any order and are not to be considered a linear process. As we mentioned earlier, not every component

is appropriate to use for different types of actions.

## STEP THREE

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### Strategize

- Strategizing bridges the gap from where the coachee is to where they want to be.
- The strategy is built by:
  - Verifying the commitment
  - Outlining resources
  - Determining timeline
  - Goal charting
  - Prioritizing actions
- Listening, Questioning and Action Planning are the core coaching skills used most.



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- Summary



STEP FOUR  
CLEAR THE WAY

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## THE 5 STEP COACHING EXCHANGE



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- It is easy to get swept up in all the ideas, planning and forward movement, yet turn a blind eye towards this part of the process.
- Without it, once the coachee sets out on executing their strategy, all the forward motion may come to a screeching halt.
- Clearing the way means clearing resistance and obstacles.
- It means looking for people, places and things that may put a drag on things.
- It also means getting unnecessary complexities out of the way.
  - Often, complexities go unnoticed, are manufactured or assumed that they'll have to be lived with.
  - A close examination with some probing questions can bring these to the surface and decisions can be made or a piece added to the strategy to circumvent the resistance if it shows up.
- A coachee's attitude or beliefs can also slow down or shut down their forward movement.
- The coach will need to explore those things below the waterline (emotions, beliefs, ways of thinking and perceptions) relative to what is above the waterline (behaviours and results) and help the coachee to explore correlations between the two.

- Listening and Questioning are the skills most often used in this step, but when appropriate, the coach can also make a big request of the coachee if the path is blocked by the coachee perceiving themselves to be stuck, or when the coach feels the coachee may be blocked by holding back or selling themselves short.

## CLEAR THE WAY MEANS

- Optimizing the action plan
- Acquiring appropriate support
- Defining and filling in what is missing
- Addressing and eliminating obstacles
- Navigating relationships with self, time and others
- Letting go of limiting beliefs, attitudes and assumptions



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### **Addressing and eliminating obstacles**

- Some obstacles may be apparent immediately, but most will take time to get to the surface.
- The coach does this by listening deeply to what may only be detectable between the lines of what the coachee is saying.
- It may be listening for what isn't being said at all.
- Curiosity and exploration catalyze the questions the coach will ask.
- Once on the surface the coach and coachee can set up action plans to move the obstacle(s) out of the way, or eliminate them completely.
- Some questions the coach may ask:
  - What may get in the way?
  - I haven't heard you say anything about \_\_\_\_, what's going to happen with that?
  - I heard you say you were tired/frustrated/confused a few minutes ago. Is that going to impact your ability to do this in any way?
  - What's it going to take to work around/through that?

### **Acquiring appropriate support**

- We all like to think of ourselves as independent and capable to do things on our own.

- Many people covet their autonomy and can become reluctant to ask for help, even in dire circumstances.
- The coach is always on the lookout for 'support resistance' and is always aware that support may be needed.
- In the Coaching Exchange, it may be enough to simply ask the coachee what support will be needed, but it may require more.
- The coach may have to go back into Discovery and explore beliefs and attitudes around asking for help and securing support.
- Some questions the coach may ask:
  - Who do you need assistance/help from to do this?
  - What support do you need to do that?
  - How do you feel about asking for help?
  - How can I support you best?
  - What would keep you from asking for help on this?

### **Defining and filling in what is missing**

- As things unfold, even after the strategy is built, there may be something missing that wasn't thought of before.
- This is the time to check in to see if there's anything missing.
- Questions the coach may ask:
  - What's missing?
  - Who do you need to talk to to find out what you don't know?
  - Is there anything we haven't covered?

### **Navigating relationships with self, time and others**

- Successful strategies usually require a dose of reality.
- It is easy to get swept up in the planning, forward motion and vision of what is ahead, but reality can derail even the best laid plans.
- Those derailments often come from unexamined possibilities in our relationships with ourselves, others or time.
- Some questions a coach can ask are:
  - How might you get in your own way?
  - Who do you need to enroll into your strategy?
  - How will you handle push-back from others?
  - What will keep you accountable?
  - How can you make space in your calendar/diary to ensure success?
  - Is this a realistic timeframe given all that needs to be done?

### **Letting go of limiting beliefs, attitudes and assumptions**

- Clearing the way often means pushing down the walls that keep our perspectives narrow or not seeing things as they really are.
- We cannot accomplish what we don't believe is accomplishable.
- We cannot see what doesn't exist in our belief system.
- Without knowing what is truthfully so, we are informed by and act upon

assumptions and guesses.

- These become invisible obstacles to success.
- Some questions the coach can ask:
  - How may your attitude be getting in the way of success?
  - What would it take to give that up?
  - Do you know that for sure, or are you guessing?
  - If you were to look at this from \_\_\_\_\_'s perspective, what would you see that you don't see now?
  - Do you believe this can be done?

## STEP FOUR

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### Clear the Way

- Clearing the way means creating a path of least resistance.
- When clearing the way:
  - Address obstacles
  - Ensure they have proper support
  - Identify what is missing
  - Roadmap relationships
  - Let go of what needs letting go of
- Listening and Requesting are the core coaching skills used most.



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## Summary

STEP FIVE  
RECAP

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## THE 5 STEP COACHING EXCHANGE



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- The Recap brings to light where the coachee is in their thinking.
- In short, it is a very succinct, clear summary of what they now know and what they are going to do.
- The coach and coachee solidify a mutual understanding of what is going to happen moving forward and how it will be done.
- The recap is also an anchoring of what has been explored, learned and committed to.
- It is the final tie off of any loose ends.
- The recap would also be considered the close of the coaching exchange.
- The Core Coaching Skill critical in recapping is Listening



## WHO DOES ALL THE TALKING IN THE RECAP?

~~COACH~~

COACHEE

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Slide builds to answer

- The coachee is ALWAYS the one to give the recap.
- The coach simply listens and may check in on a couple of things with some clarifying questions, but listening is the primary skill used.
- The coach is listening for clarity, commitment and consistency.
- Is the coachee:
  - Clear with what they are doing and where they are going?
  - Fully committed and ready to do what they said they would do?
  - Consistent in what they have said up until now in the exchange?

## WHEN THE COACHEE DOES THE RECAP, IT ANCHORS:



New  
Learning



Commitment



Accountability



Actions to be  
Taken



Forward  
Movement

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The coachee is the one who is responsible for and doing the work!

This is THEIR show, not the coach's.

So it is only natural that the coachee, in closing, steps up and takes ownership for what they have said they want and will do.

Having the coachee do the recap anchors:

### **New Learning**

The coachee will usually mention the new awareness or learning they have from the coaching and it's relevance to the actions they are committing to.

### **Commitment**

We all know that saying it out loud to someone else makes it real. It commits us in a way we don't commit when we are alone with our plans.

### **Accountability**

In the recap, the coachee is taking responsibility for what they have said they want to be accountable for. They are making a verbal statement where their level of commitment is evident in their tone, words and energy.

**Actions to Be Taken**

When the coachee has to reflect to another the action plan that have brainstormed and created for themselves in a clear and concise way, it anchors the plan.

**Forward Movement**

Again, articulating the plan for forward movement anchors the commitment to do so.

## STEP FIVE

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### Recap

- The Coachee does the verbal recap.
- Brings to light where the coachee is at.
- Cements forward action.
- Recapping anchors:
  - New learning
  - Commitments
  - Accountability
  - Actions
  - Forward movement
- Listening is almost exclusively used.



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### Summary

## THE 5 STEP COACHING EXCHANGE

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- You should be at this slide with 30+ minutes left to go.
- Ask for questions
- Remind the use of the Handout with the questions



# PRACTICE PARTNER ASSIGNMENT 1

---

Today we will assign a partner to practice with for new two weeks.

1. The breakout room will automatically assign groups.
2. In your breakout rooms, exchange contact info.
3. Return to the main room.

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## START SCREEN SHARING ...

If odd number of people, make a triad

(More complex) Give the 3 coaches today a pass to not have a practice partner as they will be doing their self-assessment. This will force you to manually assign BO rooms to exclude the main room triad.



## YOUR WORK BEFORE NEXT WEEK



### Details of Homework:

#### Reinforce Learning

1. Re-read Learner's Guide, The 5 Step Coaching Exchange.
2. (if not done in class) Watch: The Coaching Exchange - The 5 Step Coaching Exchange.
3. Capture notes in your Learning Journal.

#### Field Work

1. Conduct at least **two** Coaching Exchanges before next class.
2. Discover what is working and not working for you.

#### Prepare for Next Class:

- Read Learner's Guide:
  1. **Guiding Principle:** Be Curious.
  2. **Core Skill:** Listening.
- Watch video Coaching Skills - The 5 Core Coaching Skills.
- Bring topics you wish to be coached on.

## DELIVERY GUIDE

# POST CLASS RECAP

### End of Session 2, send out:

- Details of Fieldwork
- A Recap email with link to class recording

### Details of Homework:

#### Reinforce Learning

1. Re-read Learner's Guide, The 5 Step Coaching Exchange.
2. (if not done in class) Watch: The Coaching Exchange - The 5 Step Coaching Exchange  
<https://vimeo.com/193411023/ec10be3110>
3. Capture notes in your Learning Journal.

#### Field Work

1. Conduct at least **two** Coaching Exchanges before next class.
2. Discover what is working and not working for you.

#### Prepare for Next Class:

- Read Learner's Guide:
  1. **Guiding Principle:** Be Curious.
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- Watch video Coaching Skills - The 5 Core Coaching Skills <https://vimeo.com/193414243/e01803764c>
- Bring topics you wish to be coached on.

