

COACH:	DATE:
COACHEE:	OBSERVER:

Competency Observer Guide

As Observers:

- **The Opportunity:** Is to learn and reflect how to enhance your personal coaching approach.
- **Our Focus:** Focus on how the coach utilizes the coaching competencies and elements of the 5/5/5 Model.
- **Our Response:** Provide evidence of behaviour that supports our observation. How you heard/saw the competency/element be displayed (or not displayed).
- **Our Gift:** Is to remind the coach what they did well, so they may repeat it in the future.
- **Our Way:** How you would have coached, what you would have said or approached this exchange is good insight for you. **Not relevant to this coach as feedback.**
- **Our Delivery:** It is important the feedback is **delivered in a way that supports the coach's growth and development** by building upon the strengths of their existing skills.



Competency Observer Guide

<p>Observed Coaching Exchange Elements</p> <ul style="list-style-type: none"> <input type="checkbox"/> <u>Identify</u> - What the Client wants to accomplish and address. <input type="checkbox"/> <u>Discover</u> – Explore the options, beliefs, perspectives, and learnings. <input type="checkbox"/> <u>Strategize</u> - Action plan to bridge gap from today to future goal. <input type="checkbox"/> <u>Clear The Way</u> - Address obstacles to the action plan. <input type="checkbox"/> <u>Recap</u> - Cement clarity for forward action. 	<p>Core Coaching Skills</p> <ul style="list-style-type: none"> <input type="checkbox"/> Listening <input type="checkbox"/> Encouraging <input type="checkbox"/> Questioning <input type="checkbox"/> Requesting <input type="checkbox"/> Action Planning 	<p>Observed Guiding Principles</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be Curious <input type="checkbox"/> Be Supportive <input type="checkbox"/> Be Accepting <input type="checkbox"/> Be Focused <input type="checkbox"/> Be Committed
<p>Observed Core Competencies – Check those that apply</p>		<p>Definition / How Observed</p>
<p>3. Establishes and Maintains Agreements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Partners with the client to identify or reconfirm <u>what they want to accomplish in the session</u>. <input type="checkbox"/> Partners with the client to define <u>what the client believes they need to address</u> or resolve to achieve what they want to accomplish in the session. <input type="checkbox"/> Partners with the client to define or reconfirm <u>measures of success</u> for what the client wants to accomplish in the coaching engagement or individual session. <input type="checkbox"/> Partners with the client to <u>manage the time and focus of the session</u>. <input type="checkbox"/> Continues coaching in the <u>direction of the client's desired outcome</u> unless the client indicates otherwise. <ul style="list-style-type: none"> • Partners with the client and relevant stakeholders to establish an overall coaching plan and goals. • Partners with the client to determine client-coach compatibility. • Explains what coaching is and is not and describes the process to the client and relevant stakeholders. • Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders. • Reaches agreement about the guidelines and specific parameters of the coaching relationship such as logistics, fees, scheduling, duration, termination, confidentiality and inclusion of others. • Partners with the client to end the coaching relationship in a way that honors the experience. 		<p><i>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.</i></p>
<p>6. Listens Actively</p> <ul style="list-style-type: none"> <input type="checkbox"/> <u>Reflects or summarizes</u> what the client communicated to ensure clarity and understanding. <input type="checkbox"/> <u>Recognizes and inquires when there is more</u> to what the client is communicating. <input type="checkbox"/> Notices, acknowledges and <u>explores the client's emotions, energy shifts, non-verbal cues</u> or other behaviors. <input type="checkbox"/> <u>Integrates the client's words, tone of voice and body language</u> to determine the full meaning of what is being communicated. <ul style="list-style-type: none"> • Notices trends in the client's behaviors and emotions across sessions to discern themes and patterns. • Considers the client's context, identity, environment, experiences, values and beliefs to enhance understanding of what the client is communicating. 		<p><i>Definition: Focuses on what the client is and is not saying to fully understand what is being communicated in the context of the client systems and to support client self-expression.</i></p>

<p>7. Evokes Awareness</p> <ul style="list-style-type: none"> <input type="checkbox"/> Asks <u>questions about the client</u>, such as their way of thinking, values, needs, wants and beliefs. <input type="checkbox"/> Asks questions that <u>help the client explore beyond current thinking</u>. <input type="checkbox"/> Invites the <u>client to share more</u> about their experience in the moment. <input type="checkbox"/> <u>Notices what is working</u> to enhance client progress. <input type="checkbox"/> <u>Adjusts the coaching approach</u> in response to the client's needs. <input type="checkbox"/> <u>Challenges the client</u> as a way to evoke awareness or insight. <input type="checkbox"/> Helps the client <u>identify factors that influence</u> current and future patterns of behavior, thinking or emotion. <input type="checkbox"/> Invites the <u>client to generate ideas</u> about how they can move forward and what they are willing or able to do. <input type="checkbox"/> Supports the client in <u>reframing perspectives</u>. <input type="checkbox"/> <u>Shares observations, insights and feelings</u>, without attachment, that have the potential to create new learning for the client. ● Considers client experience when deciding what might be most useful. 	<p><i>Definition: Focuses on what the client is and is not saying to fully understand what is being communicated in the context of the client systems and to support client self-expression.</i></p>
<p>4. Cultivate Trust and Safety</p> <ul style="list-style-type: none"> <input type="checkbox"/> <u>Seeks to understand the client</u> within their context which may include their identity, environment, experiences, values and beliefs. <input type="checkbox"/> <u>Demonstrates respect for the client's</u> identity, perceptions, style and language and adapts one's coaching to the client. <input type="checkbox"/> <u>Acknowledges and respects the client's</u> unique talents, insights and work in the coaching process. <input type="checkbox"/> <u>Shows support, empathy and concern for the client</u>. <input type="checkbox"/> Acknowledges and <u>supports the client's expression</u> of feelings, perceptions, concerns, beliefs and suggestions. <input type="checkbox"/> Demonstrates <u>openness and transparency</u> as a way to display vulnerability and build trust with the client. 	<p><i>Definition: Partners with the client to create a safe, supportive environment that allows the client to share freely. Maintains a relationship of mutual respect and trust.</i></p>
<p>5. Maintains Presence</p> <ul style="list-style-type: none"> <input type="checkbox"/> Remains <u>focused, observant</u>, empathetic and <u>responsive to the client</u>. <input type="checkbox"/> Demonstrates <u>curiosity</u> during the coaching process. <input type="checkbox"/> <u>Manages one's emotions</u> to stay present with the client. <input type="checkbox"/> Demonstrates confidence in <u>working with strong client emotions</u> during the coaching process. <input type="checkbox"/> Is comfortable <u>working in a space of not knowing</u>. <input type="checkbox"/> Creates <u>or allows space for silence</u>, pause or reflection. 	<p><i>Definition: Is fully conscious and present with the client, employing a style that is open, flexible, grounded and confident.</i></p>

<p>8. Facilitates Client Growth</p> <ul style="list-style-type: none"> <input type="checkbox"/> Works with the client to <u>integrate new awareness</u>, insight or learning into their worldview and behaviors. <input type="checkbox"/> Partners with the client to <u>design goals</u>, actions and accountability measures that <u>integrate and expand new learning</u>. <input type="checkbox"/> Acknowledges and <u>supports client autonomy</u> in the design of goals, actions and methods of accountability. <input type="checkbox"/> Supports the client in <u>identifying potential results or learning</u> from identified action steps. <input type="checkbox"/> <u>Invites the client to consider</u> how to move forward, including resources, support and potential barriers. <input type="checkbox"/> Partners with the client to <u>summarize learning and insight</u> within or between sessions. <input type="checkbox"/> <u>Celebrates the client's progress</u> and successes. <input type="checkbox"/> <u>Partners with the client</u> to close the session. 	<p><i>Definition: Partners with the client to transform learning and insight into action. Promotes client autonomy in the coaching process.</i></p>
<i>Overall Coaching Approach</i>	
<p>2. Embodies a Coaching Mindset</p> <ul style="list-style-type: none"> <input type="checkbox"/> Acknowledges that <u>clients are responsible for their own choices</u>. <input type="checkbox"/> <u>Uses awareness of self and one's intuition</u> to benefit clients. <input type="checkbox"/> Develops and maintains the ability to <u>regulate one's emotions</u>. <ul style="list-style-type: none"> • Engages in ongoing learning and development as a coach. • Develops an ongoing reflective practice to enhance one's coaching. • Remains aware of and open to the influence of context and culture on self and others. • Mentally and emotionally prepares for sessions. • Seeks help from outside sources when necessary. 	<p><i>Definition: Develops and maintains a mindset that is open, curious, flexible and client-centered.</i></p>
<p>1. Demonstrates Ethical Practice</p> <ul style="list-style-type: none"> <input type="checkbox"/> Uses <u>language appropriate and respectful to clients</u>, sponsors and relevant stakeholders. <input type="checkbox"/> Is <u>sensitive to clients' identity, environment, experiences, values and beliefs</u>. <input type="checkbox"/> Demonstrates <u>personal integrity and honesty</u> in interactions with clients, sponsors and relevant stakeholders. <ul style="list-style-type: none"> • Refers clients to other support professionals, as appropriate. • Abides by the ICF Code of Ethics and upholds the Core Values. • Maintains confidentiality with client information per stakeholder agreements and pertinent laws. • Maintains the distinctions between coaching, consulting, psychotherapy and other support professions. 	<p><i>Definition: Understands and consistently applies coaching ethics and standards of coaching.</i></p>

Observer Insight

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What I observed that worked well in the Coaching Exchange.

What I learned by observing this coaching exchange.

My Coaching Action Plan

The way(s) I will integrate and/or incorporate this learning into my coaching style and approach.		
What will be the impact of doing this?	How might your client respond as a result?	What might get in the way of starting this?
Who or what will help with this action plan?	How committed are you to this action plan?	What else?