



**Intervenor Services**

*The future is in your hands*

# Coaching for Behavioural Competencies Facilitator's Guide

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## How to use this guide

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### Introduction

This guide is divided into sections, each section covering a segment of the workshop. The heading for each section indicates the topic that will be covered. On the right-hand side of the page below the heading is the approximate timing required to complete the segment, as well as the time frame.

The format for each section contains three columns as follows:

1. **Visual Aid:** Displays a graphic indicating the major aspect of the training segment. For example, you will see a small picture of each slide, and various icons to indicate types of exercises, etc.
  2. **Text:** Describes the flow of the segment, including instructions for exercises, key points to guide the discussions, and questions you can ask to engage participants in discussion.  
  
**NOTE:** While you want to respect the content in this column, try to convey the messages in your own words as much as possible. This will provide a more enjoyable and meaningful session for participants.
  3. **Materials/Notes:** This column identifies any materials required for the segment, as well as space to jot down notes.
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## Workshop agenda

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<b>Time</b>	<b>Topic</b>
0:00 – 0:15	Welcome, introduction, objectives and agenda
0:15 – 0:55	Assessing behavioural competencies
0:55 – 2:00	Coaching for behavioural competencies
2:00 – 2:10	BREAK
2:10 – 2:25	Development planning
2:25 – 2:30	Summary and wrap-up
2:30	ADJOURN

## Meeting room set-up and equipment

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### Meeting room facilities

You will need the following facilities for the workshop:

- Meeting room to accommodate a maximum of 10-15 participants and 1 facilitator.
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### Meeting room set-up

Set up the meeting room as follows:

- Tables to accommodate approximately 6 participants
  - Table at the front of the room for facilitator(s)
- 

### Equipment

Following is a list of the equipment you will need for the meeting room:

- 2 flipchart easels and pads
  - LCD projector
  - Screen
  - Markers for the facilitator for writing on flipcharts
-

## Workshop materials

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The following table outlines the materials required for the workshop and the quantity.

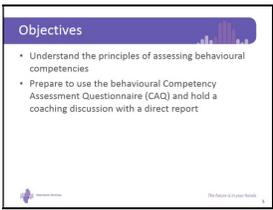
<b>Materials Required</b>	<b>Quantity</b>
Facilitator's Guide (this document)	1 for each facilitator
Copies of slides	1 per participant
Behavioural Competency Dictionary for Intervenors, Supervisors and Managers	1 per participant
Behavioural Competency Assessment Questionnaire	1 per participant
Competencies Discussion Planner	1 per participant
Tent cards (OPTIONAL)	1 per participant

# Welcome, objectives and agenda

Timing: 15 minutes  
0:00 – 0:15

Visual Aid

Facilitator's Notes

	<p><b>SHOW SLIDE 1 (Coaching for Behavioural Competencies Workshop)</b> and welcome participants to the session. Introduce self (and any other facilitators).</p>	
	<p><b>SHOW SLIDE 2 (Introductions)</b> and, depending on the group and whether or not they know each other, you can have them introduce themselves by sharing the following information:</p> <ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Role and tenure</li> <li>▪ Who is the best coach you've ever had?</li> </ul>	
	<p><b>SHOW SLIDE 3 (Objectives)</b> and review the objectives for the session.</p> <p><b>ASK</b> the group if they had any other expectations/learning goals for the session.</p> <p><b>Note to facilitator:</b> Note on a “parking lot” flipchart any participant responses that are above and beyond the original session objectives. Explain that the “parking lot” will be used to capture any extraneous issues or unanswered questions that will be followed-up at the end of the session.</p>	 <p>Create a “Parking Lot” flipchart to capture any questions or issues that are over and above the objectives of the session and/or that will need to be followed up on.</p>
	<p><b>SHOW SLIDE 4 (Agenda)</b> and review the agenda for the session.</p>	

# Assessing behavioural competencies

Timing: 40 minutes  
0:15 – 0:55

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 5 (Assessing behavioural competencies)** and transition to the segment on assessing competencies.

- As leaders, you play a key role in facilitating the development of your direct reports
- This involves:
  - Accurately assessing direct reports against the behavioural competencies
  - Helping direct reports create an individual development plan to develop the competencies, ensuring it is aligned with the mission and direction of the organization
  - Providing ongoing feedback and coaching
- This segment of the workshop is designed to provide you with the necessary knowledge, experience and tools to accurately assess behavioural competencies in your direct reports so that you can help support them in their development of these competencies.



**SHOW SLIDE 6 (Discussion)** and engage the group by asking the following:

**ASK:** *What challenges do you anticipate in assessing and calibrating against behavioural competencies?*

Solicit and discuss responses. **(10 minutes)**

**Transition** to a discussion around the behavioural Competency Assessment Questionnaire (CAQ) and principles of assessment.

# Assessing behavioural competencies, continued

Timing: 40 minutes  
0:15 – 0:55

Visual Aid

Facilitator's Notes

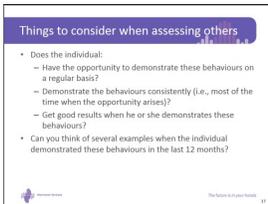
<p>The CAQ is an assessment tool to help individuals understand their behavioural competency strengths and areas for development, and define a specific path for their development.</p>	<p><b>SHOW SLIDE 7 (The CAQ ...)</b> and introduce the behavioural Competency Assessment Questionnaire (CAQ).</p> <ul style="list-style-type: none"> <li>▪ The behavioural Competency Assessment Questionnaire (CAQ) is designed to assess an individual's strengths and areas for development relative to the behavioural competencies identified for Intervenors, Supervisors or Managers.</li> <li>▪ It can be used as a self-assessment or to assess another individual's behavioural competencies.</li> </ul>	
<p><b>Principles of behavioural competency assessment</b></p> <ul style="list-style-type: none"> <li>▪ Use the behavioural Competency Assessment Questionnaire (CAQ) to assess direct reports</li> <li>▪ Assessment must be based on actual behaviour</li> <li>▪ In some situations if you are unsure, you may want to ask the individual you are assessing what his/her intent was at the time of the behaviour.</li> <li>▪ Base assessments on consistent behavioural patterns, not one-off examples (i.e., what behaviour does the individual typically demonstrate at least 75% of the time?)</li> <li>▪ Gather information/perspectives from a variety of sources</li> </ul>	<p><b>SHOW SLIDE 8 (Principles of behavioural competency assessment)</b> and discuss the principles of behavioural competency assessment.</p> <ul style="list-style-type: none"> <li>▪ In a moment, we'll take a closer look at the behavioural Competency Assessment Questionnaire (the CAQ) but first we will spend some time talking about the principles of assessment that you should follow as you work through a behavioural CAQ, either as a self-assessment tool or for assessing one of your direct reports.</li> <li>▪ An assessment of behaviour must be based on actual performance that occurred in the past (not on what you might do in the future).</li> <li>▪ If completing a behavioural CAQ on another person, you need to consider the person's intent at the time the behaviour took place (i.e., you need to ask the person to describe his/her intention).</li> <li>▪ To identify a behaviour pattern, you must have demonstrated/observed the behaviour on a consistent basis (one-time, isolated examples are not adequate).</li> <li>▪ Typically, validity is increased when the data is gathered from a variety of sources (i.e., data from a manager, a compilation of assessment data from direct reports and a self-assessment is most valid).</li> </ul>	

## Assessing behavioural competencies, continued

Timing: 40 minutes  
0:15 – 0:55

### Visual Aid

### Facilitator's Notes



### SHOW SLIDE 9 (Things to consider when assessing others) and review the things to consider when assessing others.

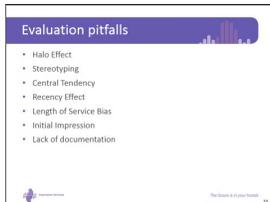
- Similar to completing a self-assessment, when assessing others, you again need to consider the following:
  - Does the individual:
    - Have an opportunity to demonstrate these behaviours on a regular basis?
    - Demonstrate the behaviours consistently (most of the time, when the opportunity arises)?
    - Get good results when they demonstrate the behaviours?
  - Can you think of several examples when they demonstrated these behaviours in the last 12 months?

## Assessing behavioural competencies, continued

Timing: 40 minutes  
0:15 – 0:55

### Visual Aid

### Facilitator's Notes



**SHOW SLIDE 10 (Evaluation Pitfalls)** and review with participants.

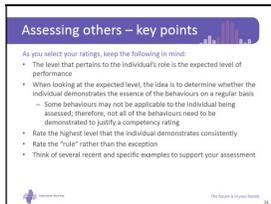
- When assessing another individual, it is important to be as objective as possible. While this type of assessment process helps prevent subjectivity, we all may be guilty from time-to-time of any one of the following evaluation pitfalls:
  - **The Halo Effect:** Allowing one single event (positive or negative) to bias overall perception or performance.
  - **Stereotyping:** A pre-supposed assumption about someone without evidence or grounding.
  - **Central Tendency:** Lumping all direct reports in the same category to avoid conflict; or “averaging” out a direct report’s performance.
  - **Recency Error:** An entire year’s performance is biased by a major error committed or a major success that occurred just before the review.
  - **Length of Service Bias:** A longer term on the job is assumed to mean higher performance.
  - **Initial Impression:** Good or bad initial impressions that just don’t go away.
  - **Lack of Documentation:** Not grounding the review with specific examples from throughout the year.

# Assessing behavioural competencies, continued

Timing: 40 minutes  
0:15 – 0:55

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 11 (Assessing others – key points)** and explain some important guidelines to follow when completing an assessment of a direct report.

- Now that you've heard about some of the evaluation pitfalls, let's discuss how to use the behavioural CAQ to assess others.
- As you complete the CAQ and indicate your ratings (i.e., determine the level of performance), keep the following in mind:
  - The level that pertains to the individual's role is the expected level of performance
  - When looking at the expected level, the idea is to determine whether the individual demonstrates the essence of the behaviours on a regular basis
  - Rate the "rule" rather than the exception, and rate the highest level that the individual demonstrates consistently
  - Some behaviours may not be applicable to the individual being assessed; therefore, not all of the behaviours need to be demonstrated to justify a competency rating
  - Think of several recent and specific examples to support your assessment
- This kind of assessment process takes practice; like any new skill, it will take time to develop a comfort level using this tool to assess others.

## Assessing behavioural competencies, continued

Visual Aid

Facilitator's Notes

**Timing: 40 minutes**  
**0:15 – 0:55**


**SHOW SLIDE 12 (Exercise: Assessing a direct report)** and review the instructions with participants.

**Refer** participants to the behavioural CAQ in their participant materials.

Task participants to do the following:

1. Think about one of your direct reports.
2. Using the behavioural CAQ, review each competency and identify the level where you feel the individual consistently demonstrates the behaviours associated with that level and all of the levels that precede it.
3. Provide behavioural evidence to support your assessment in the space provided.

**Note to facilitator:**

- Suggest to participants that to get the most benefit out of this exercise, they may want to pick someone who will be more challenging to assess.
- Depending on time, you may have participants only complete the assessment on 2-3 behavioural competencies for this exercise.

- 1 behavioural CAQ per participant
- 1 Behavioral Competency Dictionary for Intervenors, Supervisors, and Managers per participant

## Assessing behavioural competencies, continued

Timing: 40 minutes  
0:15 – 0:55

### Visual Aid

### Facilitator's Notes

If the individual is...	Then...
Consistently demonstrating the behaviour (i.e. ≥ 75% of the time) at the level reflective of their role	the individual is on target – this is a competency strength
Consistently demonstrating the behaviour below the level reflective of their role	the individual is below target – this is a competency gap
Consistently demonstrating the behaviour above the level reflective of their role	individual is above target – this is a competency strength

**SHOW SLIDE 13 (Identifying behavioural competency strengths and gaps)** and discuss behavioural competency strengths and gaps.

- Once you've completed the behavioural CAQ, look for strengths and gaps by comparing results to the target levels as follows:
  - If the scored level is *on or above the target level*, this is a *competency strength*
  - If the scored level is *below the target level*, this indicates a *competency gap* -- an area where the individual should focus their development efforts

**ASK:** *What are some challenges in completing the behavioural CAQ?*

Solicit and flipchart responses. Sample responses include:

- Not enough information
- Haven't had the opportunity to observe the individual demonstrating the competency
- The role doesn't provide an opportunity to demonstrate the competency.

**ASK:** *How can we resolve some of these challenges?*

Solicit responses. Sample responses include:

- Obtaining information from a variety of sources.

# Coaching for behavioural competencies

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes

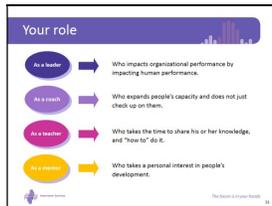
	<p><b>SHOW SLIDE 14 (Coaching for behavioural competencies)</b> and introduce the next segment of the session.</p> <ul style="list-style-type: none"> <li>▪ We're now going to move on to coaching for behavioural competencies.</li> </ul>	
<p>In your role as leader, you will need to provide support, development and coaching to your direct reports around the behavioural competencies. The next section of the workshop is about equipping you with the skills and tools to do this.</p>	<p><b>SHOW SLIDE 15 (In your role...)</b> and review the slide with participants.</p> <ul style="list-style-type: none"> <li>▪ Once you and your direct report have completed the assessment, the next step is to meet with the employee for a coaching/review discussion.</li> <li>▪ The assessment data is designed to be used by the employee and his/her manager as a basis or framework for discussion – it is not, by any means, a final assessment of performance.</li> <li>▪ The objectives for this section are to:             <ul style="list-style-type: none"> <li>➢ Highlight effective techniques/behaviours for coaching for behavioural competencies</li> <li>➢ Provide a sample framework for managers/leaders for holding a competency development discussion</li> <li>➢ Equip you with the necessary knowledge and skills to support your direct reports in developing their behavioural competencies</li> </ul> </li> </ul>	

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

Visual Aid

Facilitator's Notes



**SHOW SLIDE 16 (Your role)** and discuss the manager role with participants.

- As a manager, you bring many different perspectives to the manager/employee relationship and wear many different hats:
  - As a leader: You impact organizational performance by impacting human performance.
  - As a coach: You help expand people's capacity rather than just check up on them.
  - As a teacher: You take the time to share your knowledge, and "how to" do it.
  - As a mentor: You take a personal interest in people's development.
- Sometimes it's appropriate to be a leader, and other times a mentor. You need to decide which hat to wear based on the situation.
- It is equally important to adjust and adapt your approach, changing your hat, sometimes on the fly, to best meet the employee's needs at a given time.



**SHOW SLIDE 17 (Coaching is...)** and discuss the characteristics of coaching.

- Coaching:
  - A genuine intent to foster the longer learning and development of others
  - A practice and way of "being" that brings out the best performance in others
  - Discovering and transforming behaviours that limit performance
  - About moving forward. Coaching will help focus the coachee on his or her performance, purpose and goals and work towards achieving them.
- Coaching is not about providing the answers for the person, but enabling them to explore and find the answers for themselves.

## Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

### Visual Aid

### Facilitator's Notes



**SHOW SLIDE 18 (Keys to effective coaching)** and review with participants.

- Coaching should be positive and constructive, to support continuous improvement and growth.
- It should be objective and based on evidence.
- It should also be participatory, where employees are involved in all stages of the process.
- Employee development needs to be self-directed and employees need to assume primary responsibility for managing their own improvement and development.
- Coaching also needs to be future-oriented, focusing on future performance, not on past mistakes.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 19 (Critical coaching skills)** and review with participants.

- There are four key skills that will help you when coaching your direct reports around behavioural competencies. They are:
  - **Listening** – We listen at three different and distinct levels. How you listen will have a significant impact on your coaching. The three levels of listening include:
    - Level One – focus on self. This level is about giving advice and solving problems. Avoid defaulting to this level.
    - Level two – focus on the coachee. Aspire to this level.
    - Level three – focus on the coachee and on the entire environment within and surrounding the conversation with the coachee.
  - **Inquiring** – Ask powerful questions. Avoid long-winded questions and always phrase questions in an open ended fashion. Demonstrate a genuine interest in the individual. **Seek to understand and discover.**
  - **Paraphrasing** – Confirm understanding of the thoughts and feelings of the coachee, helping focus attention on particular aspects of the conversation and summarizing the discussion.
  - **Moving to action** – Identify the intention, have them take accountability to move to action and achieve results. It's about finding out their plan of action, and identifying the measure(s) of success – what success looks like.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes



### SHOW SLIDE 20 (How to approach the feedback/coaching discussion) and review with participants.

- A coaching for competencies discussion is a two-way conversation between you and your direct report that will lead to consensus on strengths and areas of focus for development. Your approach to the feedback/coaching discussion should involve the following:
  - **Establishing the goal:** Help them identify a goal that is both realistic and challenging (i.e., it demands some stretch but is realistic and achievable).
  - **Gathering background information and discussing perspectives:** Discuss the individual's performance relative to the behavioural competencies, and seek their input on any gaps and challenges they face. Discuss your perspective including what you have observed regarding the individual's performance relative to the competencies.
 

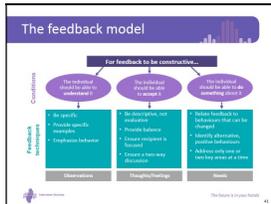
Note: Prior to the session, gather any additional information or evidence based on the input of others to support your rating, as required.
  - **Identifying next steps:** Work with the individual to identify specific development opportunities to close any gaps. These will likely serve as input into the individual's development plan
- When coaching for competencies, you will need to take the following three factors into consideration:
  - **The Context:** The individual's personal and professional situation and the organizational context in which he/she works
  - **The Data:** The individual's behavioural CAQ results and your experience with the individual and what you have observed regarding their performance relative to competencies
  - **The Person:** Their aspirations, motivations, strengths and what they would like to achieve in their role
- We will now outline the key steps for providing feedback and holding the discussion.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 21 (The feedback model)** and review the feedback model.

- Feedback information to your direct report – positive and/or constructive – that will help them identify what needs to be done to improve performance. Do not make accusations or generalizations about the individual's motives, personality, or character traits. The feedback model will help you when holding coaching for competencies discussions with your direct reports.
- Improvement or development is only possible when the individual is informed about where they need to change their behaviour, improve their performance or develop in certain areas including behavioural competencies. There are certain conditions for an individual to change their behaviours:
  - Does the individual understand what needs to change?
  - Does the individual accept it?
  - Can the individual do something about it?
- For these conditions to be met, there are certain things you need to do.
- **ASK:** What do you need to do – what techniques can you use to help ensure the individual comprehends what needs to change? Solicit responses. Responses include:
  - Communicate your observations
    - Be specific and provide specific examples
    - Emphasize behaviour
- **ASK:** What do you need to do – what techniques can you use to help ensure the individual accepts it? Solicit responses. Responses include:
  - Communicate your thoughts and feelings
    - Be descriptive, not evaluative
    - Ensure balance: Refer to successful as well as less successful behaviour
    - Ensure recipient is focused
    - Ensure a two-way discussion

Continued...

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

Visual Aid

Facilitator's Notes

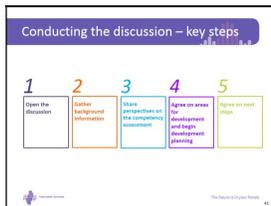
	<ul style="list-style-type: none"> <li>▪ <b>ASK:</b> What do you need to do – what techniques can you use to help ensure that the individual can do something about it? Solicit responses. Responses include:             <ul style="list-style-type: none"> <li>➤ Communicate your needs going forward                 <ul style="list-style-type: none"> <li>– Relate your message to the behaviours that can be changed</li> <li>– Identify alternative positive behaviours</li> <li>– Address only one or two key areas at a time</li> </ul> </li> </ul> </li> <li>▪ We've provided you with an overview of the model for providing feedback. We're now going to go into more detail around how to prepare for and hold the coaching for competencies discussion.</li> </ul>	
	<p><b>SHOW SLIDE 22 (Preparing for the discussion)</b> and review with participants.</p> <ul style="list-style-type: none"> <li>▪ As a first step, you will need to independently assess the employee's performance.</li> <li>▪ You then need to review their self-assessment as well as your assessment of the individual.</li> <li>▪ Using the Competencies Discussion Planner, prepare for the discussion as follows:             <ul style="list-style-type: none"> <li>➤ Identify areas of agreement and/or disagreement based on your assessment of this team member</li> <li>➤ Anticipate the kind of discussion it will be:                 <ul style="list-style-type: none"> <li>– Consider how you are feeling about the meeting and sharing assessment results with the individual</li> <li>– Think about how the individual might respond or react to the assessment based on your understanding them and their self-assessment</li> </ul> </li> <li>➤ Plan how you might approach the meeting and how to respond to any potential questions and concerns the individual may have.</li> </ul> </li> </ul>	

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

Visual Aid

Facilitator's Notes



**SHOW SLIDE 23 (Conducting the discussion – key steps)** and review with participants.

- Here is a roadmap for helping ensure a successful coaching for competencies conversation.
- There are 5 key steps to follow:
  - Step 1: Open the discussion
  - Step 2: Gather background information
  - Step 3: Share perspectives on the behavioural competency assessment
  - Step 4: Agree on areas for development and begin development planning
  - Step 5: Agree on next steps
- Let's look at each step in more detail.



**SHOW SLIDE 24 (Key steps for the discussion)** and review with participants.

- Since the coaching discussion is a shared process, one in which the employee must actively participate, as a manager:
  - Ensure privacy and confidentiality and then start the conversation. The first few minutes of the discussion are critical – they will set the tone for the rest of the meeting.
  - Discuss the goal/purpose of the discussion and come to agreement on competency strengths, areas for developmental focus, and next steps in terms of development. Use the completed behavioural CAQ as a framework for discussion.
- In step 2, gather additional background information. Discuss the individual's situation (e.g., current challenges, his or her team, etc.), and understand what the individual wants to accomplish in terms of their role/performance as well as their career aspirations.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

Visual Aid

Facilitator's Notes



**SHOW SLIDE 25 (Share perspectives on the behavioural competency assessment)** and review with participants.

- During this step, do the following to ensure you understand each other's perspectives regarding the behavioural competency assessment:
  - Gather your team member's perspective on their self-assessment. Ask them to share what they see as their strengths and areas for development and listen carefully to what the individual has to say.
  - Ask probing questions so that the individual can provide you with examples to support their ratings in the self-assessment. For example:
    - Can you share some additional examples of when you've demonstrated that behavioural competency?
    - You said that you see (competency) as a strength/area for development – can you talk more about that?
  - Then share your perspective, focusing first on areas of agreement, then moving on to areas where you have a different perspective. Ensure you provide examples to support your perspective/assessment.
  - Check in for their reaction and to confirm understanding.



**SHOW SLIDE 26 (Feedback challenges)** and ask participants the question on the slide.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 27 (Managing feedback challenges)** and review with participants.

- When meeting with the individual about behavioural competencies, don't expect it to be easy the first time. While most discussions will not involve a great deal of disagreement, expect questions, and in some cases, disagreement with some of your assessment.
- Here are some tips for handling differences of opinion:
  - As we mentioned earlier, when preparing for the session, anticipate where the differences may occur.
  - In the meeting, highlight where there are differences.
  - Be open to new information and to what they are telling you. You may be made aware of certain situations or circumstances that you previously were not aware of.
  - Listen carefully and reflect the individual's feelings: Try to understand what the individual is feeling, why they are feeling that way, and the resulting impact.
  - Find common ground to build upon: Look for areas of agreement and understanding. Then you can start building consensus and coming to agreement around the behavioural competency assessment and next steps.
  - Avoid being defensive: Be calm and support your ratings with evidence while being open to the individual's perspective and feedback.
- Help the employee recognize that the value of the discussion lies in improving self-awareness and identifying developmental activities/opportunities or determining next steps.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

## Visual Aid

## Facilitator's Notes



**SHOW SLIDE 28 (Key steps for the discussion, continued)** and review with participants.

- In step 4, there are a few things you can do to agree on areas for development and begin development planning:

- Identify 2-3 areas for development and work with the individual to prepare a development plan
- Explore development opportunities/activities

Preparing a robust plan takes time, so the individual may need to work on the plan following the meeting and then review with you at a later date.

- In the last step, finalize the development plan, identify the support the individual requires either from you or others, and discuss frequency and timing of progress check-ins.
- Both you and your direct reports have a role in this process. You need to remember, however, that not all direct reports will be ready to assume this role and will need to be guided along. Your role will be to create an environment in which your team members will be encouraged to take ownership for their own development.

# Coaching for behavioural competencies, continued

Timing: 65 minutes  
0:55 – 2:00

Visual Aid

Facilitator's Notes



**SHOW SLIDE 29 (Exercise: Coaching discussion role plays)** and review with participants.

- Now that we have explored what coaching for behavioural competencies involves and what effective coaching looks like, you are now going to prepare for and hold a coaching for competencies discussion.

**ASK** participants to refer to the behavioural CAQ that they completed earlier on one of their direct reports.

Task participants to do the following:

- Using the Competencies Discussion Planner, prepare a few notes about this individual to give to your partner (who will role play the individual), and identify two behavioural competencies you would like to discuss with this individual:
  - One that is a strength
  - One that is an area for development
- With your partner:
  - Brief your partner on the individual, sharing your notes.
  - Take turns role playing the coaching discussion to come to agreement on the competency ratings. You will have 10 minutes to conduct each role play. Following each role play, discuss what went well and what you could have done differently as the manager.

**Debrief:**

- ASK:**
  - Would anyone like to volunteer to share any of their coaching situations/plans?
  - Did you find the Competencies Discussion Planner helpful? How did the roleplay go? What did you do well? What could you do better next time?
  - What are some of the potential challenges? How can you resolve them? Are there any guiding principles or themes for coaching for behavioural competencies that you would recommend to others?

- Each participant's completed behavioural CAQ from the Assessing Competencies Exercise
- 1 Competency Dictionary for Intervenors, Supervisors, and Managers Dictionary per participant
- 1 Competencies Discussion Planner per participant



**BREAK (2:00 – 2:10)**

# Development planning

**Timing: 15 minutes**  
**2:10 – 2:25**

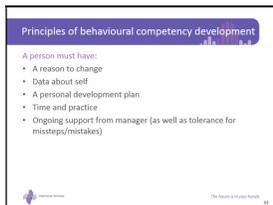
Visual Aid

Facilitator's Notes



**SHOW SLIDE 30 (Development planning)** and introduce the development planning segment of the session.

- After holding the coaching discussion, the next step is for your direct report to prepare a development plan and for you to support them and follow up as required.
- In this section, we will review the principles and stages of behavioural competency development, as well as provide some information about effective development plans.



**SHOW SLIDE 31 (Principles of behavioural competency development)** and review with participants.

- The following key principles must be in place for behavioural competency development
- A person must have:
  - A reason to change
  - Data about self
  - A personal development plan
  - Time and practice
  - Ongoing support from manager

## Development planning, continued

Timing: 15 minutes  
2:10 – 2:25

### Visual Aid

### Facilitator's Notes



**SHOW SLIDE 32 (Good development plans are...)** and provide participants with some key tips for creating development plans with their direct reports.

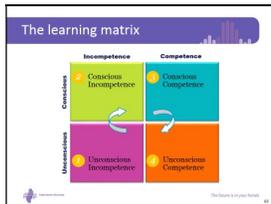
- Effective development plans are jointly developed by the manager and direct report.
- They should include, where possible, on-the-job experiences that provide real-life experiences, as this is where the greatest learning typically takes place.
- Development plans should outline the specifics, including detailing the support required and completion dates.
- They should be focused. One to three development activities should be identified for 2-3 areas for development.
- The direct report should take responsibility for their own development and as the manager you should follow up on a regular basis on his/her progress.

## Development planning, continued

Timing: 15 minutes  
2:10 – 2:25

### Visual Aid

### Facilitator's Notes



**SHOW SLIDE 33 (The learning matrix)** and review the four stages of learning/competence.

- There are four stages that people go through as they learn something new – the stages of competence – as pictured in this slide.
  - **Stage 1: Unconscious incompetence** – in this stage, the direct report doesn't know what they don't know, or that they need to learn it (this is the "ignorance is bliss" stage!). It is critical that the individual recognize their incompetence, and the value of a new skill, before moving on to the next stage.
  - **Stage 2: Conscious incompetence** – in this stage, the direct report knows what they don't know. They recognize this deficit, as well as the value of the new skill in addressing the deficit. This stage can be demoralizing for some people, causing them to lose confidence or even give up on their efforts to learn. Therefore, it's important that you support and encourage them to help them stay positive at this stage.
  - **Stage 3: Conscious competence** – in this stage, the direct report understands or now knows how to do something. However, demonstrating the skill or knowledge requires concentration and focus, but as they get more practice and experience, it becomes increasingly automatic. At this stage, it's important, as their manager, to help the individual identify opportunities to practice.
  - **Stage 4: Unconscious competence** – in this final stage, the individual has had so much practice that the skill has become "second nature" and can be performed easily or effortlessly – without conscious effort. As a result, the skill can be performed while executing another task. At this stage, to help maintain the employee's motivation and interest, you may want to assign new tasks to the individual.

Continued ...

## Development planning, continued

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**Timing: 15 minutes**  
**2:10 – 2:25**

**Visual Aid**

**Facilitator's Notes**

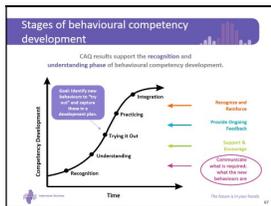
- Understanding the stages of learning can be helpful to you as a manager. It can help you understand what your people are going through, how you can support them in their development and help them stay motivated, particularly when learning is very challenging. You can then help them understand their emotions as they learn new skills, and encourage them when they're feeling frustrated or disillusioned.
- For example, during the consciously unskilled phase, you can reassure the direct report that, while learning this skill is difficult and frustrating right now, things will improve. And when they're unconsciously skilled – the unconscious competence stage – it can help to remind them to value the skills that they've gained.

## Development planning, continued

Timing: 15 minutes  
2:10 – 2:25

### Visual Aid

### Facilitator's Notes



**SHOW SLIDE 34 (Stages of behavioural competency development)** and review the stages of behavioural competency development.

- This slide shows the actions a manager should take at various stages of behavioural competency development.
- The first stage is recognition and then understanding. To move from recognition to understanding, as the manager, you should communicate what is required, including what the new behaviours are.
- The next stage is trying it out. The manager's role is to support the individual's learning.
- In the practicing stage, you should be coaching and providing feedback to the employee.
- Integration is the final stage, and as the manager, you should recognize and reinforce these behaviours.
- Today's training is really focused on getting you past the first stage: recognition
- **ASK:** What would happen if you had a direct report at the recognition stage, but went right into coaching and providing feedback? How would the direct report react?

Solicit responses.

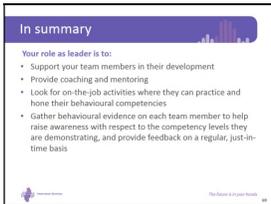
- I encourage you to think about how you will help support your direct reports' behavioural competency development through each stage.

# Summary and wrap-up

**Timing: 5 minutes**  
**2:25 – 2:30**

**Visual Aid**

**Facilitator's Notes**



**SHOW SLIDE 35 (In summary)** and review with participants.

- Your role as a manager is to:
  - Provide coaching and mentoring to direct reports
  - Look for on-the-job activities where team members can practice and hone the behavioural competencies identified for development
  - Document behavioural evidence for each direct report to help develop their awareness with respect to the current behavioural levels they are demonstrating, and provide feedback on a regular, just-in-time basis



**SHOW SLIDE 36 (Questions?)** and wrap up the session.

**ASK** participants if they have any questions.  
Thank participants for their time, and close the session.

