

# **THE COMPANY COACH HANDBOOK**

## **guidelines to the “Perfect 50+” Process and supporting Tools**

*(the Italian experience - final version October 2009)*

The present document has been realised within the  
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Education and Culture DG

Lifelong Learning Programme

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## 1 Background

The present handbook is a guide on the methodologies to support the participant to “**The Company Coach**” training project that has been developed within the “Perfect 50+” European Project, LLP Programme on Life Long Learning, funded by the European Commission, DG Education and Culture.

In the current Italian culture and organisational practice the figure of the Company Coach is practically non-existent, or it can be considered a prerogative of big multinational companies that have transferred innovative management and human resources development tools and methodologies from foreign parent companies to Italian units. Company Coaching is among these methodologies, and it is carried out by people employed by the company.

This is the reason why, at present, in the Italian experience, the coach figure is essentially represented by free-lance external consultants who are specialized in the methodology and are experts in the organizational and psychological contents connected to the coaching process. Therefore they can provide ad-hoc, targeted consultancy, but as external consultants. The professional coach has a qualification resulting from a long and specific educational and training pathway that cannot be compared, neither in contents nor in its practice, to the pathway foreseen in this curriculum. For these reasons, and in respect of the deontology of professional coaches, the coaching method transferred through the present curriculum is called “structured” coaching, to underline the necessary and strict borders that the Company Coach has with regard to how deep he/she is entitled and able to work with employees on personal matters that can arise during the Perfect 50+ process foreseen.

This handbook supports users in putting into practice the “Perfect 50+” concept, which aims at introducing and make participants aware of the coaching methodology (so that it can be transferred in the workplace) by means of short structured coaching sessions and with a typically organizational perspective and connotation. The users of the here-described process is a company staff member (entrepreneur, head of department or employee) and as such is pushed by organizational purposes and business objectives.

The kind of coaching proposed here is therefore intended to make, first of all, Company Coaches more aware, and, more widely, to get the enterprises of our territory to adopt human resources development methodologies and policies based on an organizational approach that sees the employee as the key strategic resource among all the organizational variables. Furthermore, companies should start to bet on human resources, giving voice to their expectations and motivational push to make an attempt to understand them and reconcile them with business objectives.

The worker stops being a simple performer of operations and directives imposed from the management and starts to become a responsible leading player of work performances, getting involved in pathways of professional development and growth. S/he, through coaching, is interviewed and listened to about his/her own needs wishes, expectations, competences.

S/he is asked to focus and express what his/her professional development goals are and this is done prior to the declaration of company expectations and Management

point of view. This is the basic principle of the structured coaching methodology: to listen to the worker without prejudice, without supplying any conditioning element beforehand; rather, the worker is supported in focussing and defining his/her wish to improve.

Coaching is in fact a process through which individuals or groups of people are helped to focus their professional goals, providing them with the necessary tools and resources required to pursue them with constancy and to accomplish them, activating the best energies and empowering believes against the obstacles of limiting believes.

The handbook can take an individual working within a business context through a process that enables him/her to apply the Tools of human resources management and development, using the coaching methodology by means of short structured sessions. The purpose of this is to adopt an approach that begins with the exploration of the human resource and singles out the potential leverages to pursue business objectives.

Last but not least, finally, is the element on which the structured process of coaching is based, that is the coachee/worker, on whom the company decides/accepts to invest through a project of professional development.

The coachee's age and experience necessarily condition the kind of coaching to put into effect.

For example, the coaching carried out on a young new-recruited worker will differ from a coaching realized on an adult and professionally experienced worker; even more delicate and complex is the coaching carried out on an over-50 worker, who is usually an expert and holder of a corporate memory which is very precious for the company itself; in this view, the coaching is more a project of enhancement to make the worker's unspoken professional heritage surface/be coded, with the aim of transferring it to others that are less expert, in intergenerational view.

In other cases, instead, the coaching of over-50 workers aims at supporting them in the updating of their competences and skills, that have become obsolete, and to adjust them to the quick changes imposed by competitive pressure, and then to support them in undertaking learning and training pathways that aim to improve knowledge and capacities.

The present handbook is intended to explain, in its fundamental passages, the process that the Company Coach goes through together with his/her coachee and the tools that s/he can rely on to manage this process in a structured way.

## 2 Process phases and the supporting Tools

### **Phase A: Coaching assignment**

As for all the initiatives and actions that are undertaken in the organisational context, the implementation of a structured coaching, that is necessary to follow the professional development of a single worker or a work team, also needs prior approval on the part of the business Management, which validates the process after considering it in line with their organisational development and management policies and strategies.

The business Management, therefore, gives the Company Coach the formal assignment to start a pathway of support and backing to the professional development of another worker operating within the business (coachee), through the formal subscription of a document (*Tool 1*) that describes the goals, phases and devices to be used in the coaching process that is being started.

The subscription of this assignment foresees a talk between the Management and the Company Coach. During this talk, the coach can take any note by means of *Tool 2* - a Memo that can also be used in the pathway process as it can be adapted to all phases, any time the coach establishes that it is necessary to write down some considerations/notes/jottings.

Tools to be used in Phase A:

- Tool 1 – Assignment
- Tool 2 – Memo

### **Fase B: Assessment of worker's competences**

This phase foresees the first meeting between the Company Coach and the coachee worker. During this meeting the Company Coach, through a structured interview, formalizes the worker's job position by means of an in-depth analysis of his/her area of activities and the competences put into field by the same worker in performing his/her role.

Organizational Position is defined as the worker's place within the business general system (organisation chart). This is the result of a series of elements/factors that form the worker's area of activities, that is:

- Level of involvement in the work process: operational/executory; of process regulation/management; of process orientation/innovation
- Tasks and activities to be carried out personally: assignments/duties
- Possible budget to manage
- Tools and manufacts to use
- Relations to establish with internal and external interlocutors

The worker's System Of Competences is defined as the whole of his/her personal and professional knowledge, classified by conceptual convenience in:

- Attitudes: personal and character manners, dispositions and inclinations, motivations, wishes (to be able to be)
- Knowledge: Know how: “to know how to do”, understanding of procedures that enable the worker to intervene with expertise in the process operations within the field of activities ; Know what: “to know what to do”, a declarative knowledge which enables to describe and interpret the properties relating to objects, tools, techniques and technologies used within the field of activities; Know why: “to know why to do”, a predictive-explanatory knowledge of logical-causal type that enables to evaluate the innovative alternatives in the field of activities and to forecast new outcome effects (to know)
- Ability: technical-operational skills, managerial skills, cognitive skills, relational skills (to be able to do)

In this phase the Company Coach, interviewing the worker in a structured way and guided by the conceptual model of vocational competences referring to the area of activity, is able to carry out an assessment of competences that is prerequisite to focus and define the worker’s current job position within the company as the starting point for his/her professional development project.

The assessment is a record/evaluation of both objective and subjective elements, and at this stage it represents the manifestation of the coachee worker’s perception and point of view with respect to the position s/he holds in the company, as well as the way in which s/he thinks s/he holds it.

This interview gives voice to the worker, providing him/her with a chance to reflect upon what s/he puts into practice on a daily basis, with the aim of exploring and make his/her true perception surface without it being conditioned by interferences nor value judgements by the coach or the business Management. It is a neutral and non-conditioned survey, based on unprejudiced worker’s listening.

Tools to be used in phase B:

- Tool 3 – Assessment of worker’s competences
- Tool 2 – Memo

### **Phase C: Structured coaching session (Exploration)**

In this phase the Company Coach takes a step forward with respect to the previous assessment phase, in that now s/he makes an attempt to explore the coachee worker’s wishes and expectations with regard to his/her in-company professional development.

While the assessment of the area of activities and worker's competences represented the description of his/her position and the present status within the organizational system, the structured coaching session that opens in this phase has the aim of exploring the worker's future dimension, that is the perception/expectation that s/he has about the evolution of his/her role at work.

In this phase the Company Coach supports the coachee in the investigation and recording of his/her wishes, interests and expectations and backs him/her in the definition of potential goals in professional development. The coach asks questions and does not provide any answer, listens without giving advice nor value judgements on the remarks and information he gets to know. S/he only has the task of adopting

an empathetic attitude towards the coachee, which favours a frank and open dialogue that is uniquely centered on the individual (working person).

In this phase the company's point of view (business Management), that is the expectations of the company and the interests connected to business requirements are still unsaid to the worker, that means they have not been declared so far. Once again, this avoids the creation of any possible form of conditioning in the coachee.

Should any request arise on the part of the worker relating to the wish to take part into learning opportunities (seminars, vocational training courses or others) during the interview, also with proposals about training provider(s) and costs, in this case it is appropriate to submit a formal request to the business Management by means of Tool 5 – Proposal of training to the management, because explicitly requested by the worker.

After evaluating the proposal, the Management accepts it or rejects it, signing the module in the appropriate section.

Tools to be used in phase C:

- Tool 4 – Structured coaching session (Exploration)
- Tool 5 – Proposal of training to the management
- Tool 2 – Memo

#### **Phase D: Statement of the management expectations on the worker**

This is the process phase where the business Management is asked to outline, define and openly express their expectations about the worker's professional development, coherently with their own business interests and the strategic business development plan.

In this very moment the business Management makes a forecast of what their investment needs on the worker are, in terms of professional goals that s/he must reach and the competences to develop/improve in view of the achievement of the goals described above.

The communication of such information to the worker should be done in a direct and way, during an interview between the worker and the business Management. It is a Management choice to invite the coach to this interview or not.

The Company Coach can get to know these information also at a different time. Eventually, s/he will have the duty to back the worker in the next phase, of reprocessing and restating of worker's position, taking into account the opinions expressed by the Management (process of mediation/negotiation of mutual expectations), with the aim of reaching the definition of an agreed professional development project.

Tools to be used in phase D:

- Tool 6 – Competences to be acquired by the coachee on the basis of the company development plan (filled by the business Management)

### **Phase E: Design of the Professional Development Project**

In this phase the Company Coach meets the worker to firm up a project of professional development, which is the rundown and final result of the intersection between worker's expectations (explored in the first steps of the pathway), on the one side, and those of the business Management on the other side. The Company Coach's task is now to assess, by means of questions, the real worker's understanding of the demands expressed by the company about the need/opportunity of his/her professional growth, and also to verify his/her level of sharing and acceptance.

The worker's motivation towards the learning pathway that s/he will have to start plays an important role for the good result and success of the learning experience. Change does not take place without motivation.

The construction of a project of professional development entails the agreement and sharing with the worker of the goals and actions to take to achieve these goals, of times and modes to estimate the results accomplished.

It also implies to clarify and take factors that can possibly bind or hinder the achievement of goals into consideration; such factors can either be present in the subjective, personal worker's dimension or in the objective work environment dimension.

Tools to be used in phase E:

- Tool 7 – Professional Development Plan
- Tool 2 - Memo

### **Phase F: Monitoring the development process**

After the construction of the professional plan, measures are applied to monitor the level of accomplishment of the same plan and the achievement of satisfactory results with respect to the goals established beforehand.

This phase must be considered as a process of ongoing evaluation and monitoring of the pathway and it can consist of several meetings between the Company Coach and the coachee. The number of meetings must be established on the basis of project's complexity and estimated pathway duration.

The monitoring is done by means of structured coaching sessions during which the Company Coach meets the coachee and helps him/her to become aware of the progress of pathway development and the intermediate results that are, from time to time, achieved or failed.

The monitoring sessions have marked reflective and self-dignosis characteristics, and their purpose is to ascertain and estimate the level of goals accomplishment and to plan, if need be, possible corrective measures to realign the pathway with the original action plan.

In this phase the evaluation of the training/learning course attended by the coachee in contexts other than the company is also foreseen: to evaluate this, the filling in of Tool 9 – Evaluation of the external training attended, is recommended. This is done

by interviewing the worker on training satisfaction and utility of what was learnt for the professional life.

Tools to be used in phase F:

- Tool 8 – Structured coaching session (Monitoring)
- Tool 9 – Evaluation of the external training attended

### **Phase G: End-of-process evaluation**

At the end of the process a final and overall evaluation of the experience is foreseen. This evaluation has to be intended as shared by both players of the process, the coach and the coachee, who evaluate together the final outcomes of the development pathway that the worker has undertaken, as well as the effectiveness of the methodologies and actions chosen to achieve it. The evaluation must let the points of strength (factors of success) and the points of weakness (critical points) of the experience come out.

Tools to be used in phase G:

- Tool10 – Final evaluation of the path carried out with the worker

### **Phase H: Report on the outcomes to the business Management**

In this last phase the Company Coach and the coachee fill in a document (Tool 11) in which they report to the business Management on the outcomes of the development pathway carried out by the worker and the effectiveness of the structured coaching progress enacted.

The report on outcomes will also indicate the costs and benefits obtained by the experience. It is a good practice to hand in the document giving a direct explanation of the results, therefore a meeting among coach, coachee and business management is recommended.

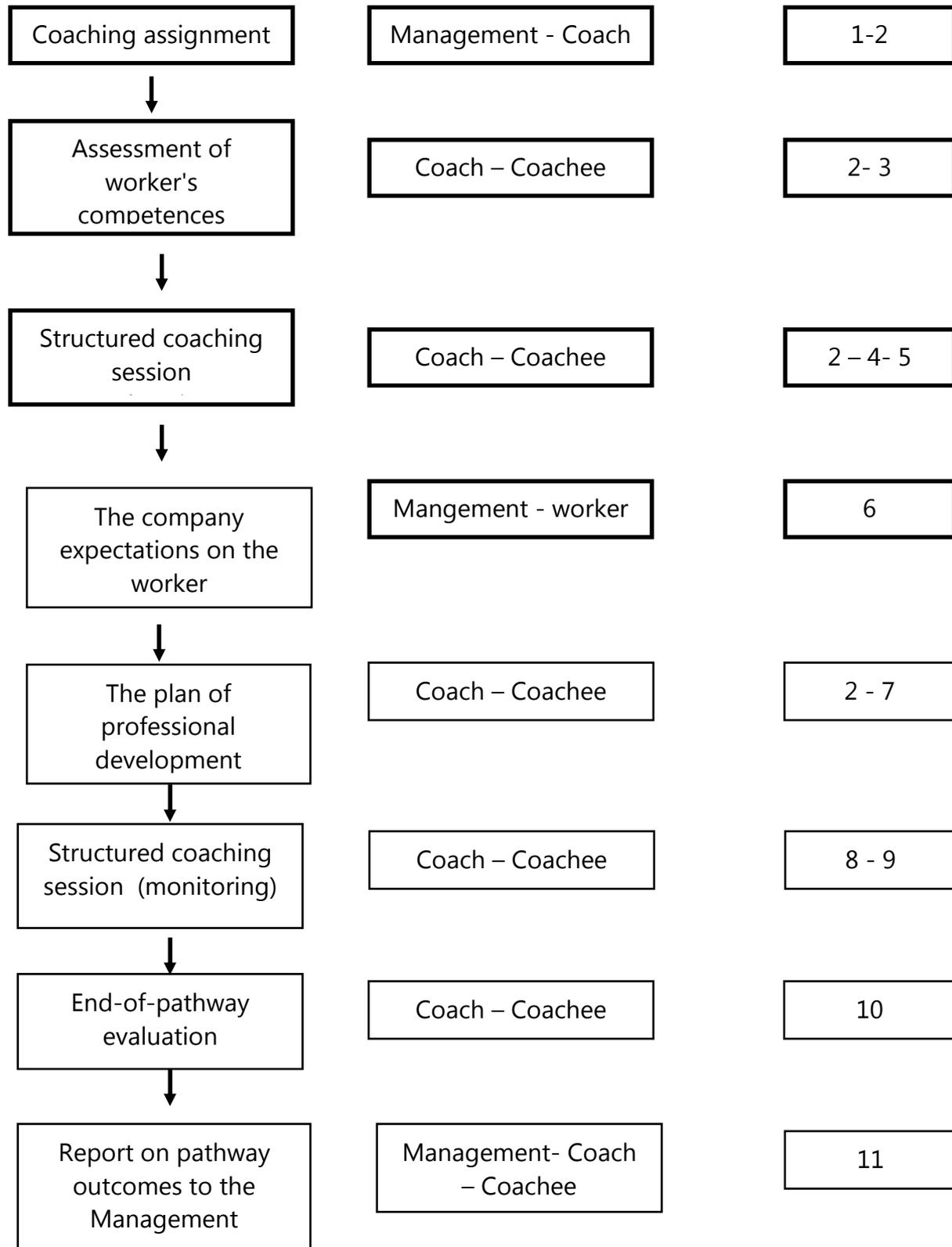
Tools to be used in phase H:

- Tool11 – Final report to the management

**PROCESS PHASES**

**PEOPLE INVOLVED**

**TOOLS**



# **ANNEX**

## **THE TOOLS**

## Tool 1: Assignment

<b>Director/entrepreneur</b>	
<b>Coach</b>	
<b>Coachee</b>	
<b>Starting situation</b>	
<b>Objective of the coaching process</b>	
<b>Steps of the coaching process</b>	
<b>Tools to be used</b>	

\_\_\_\_\_  
(Signature of the Management)

\_\_\_\_\_  
(Company Coach signature)

## Tool 2 – Memo

Date:	_____
Persons involved:	_____
Notes taken by:	_____
Topic of the interview :	_____

### Memo

## Tool 3 – Assessment of worker’s competences

### **Description of the Area of activity**

Position: \_\_\_\_\_

Level of intervention:

- operative/execution on the process
- of regulation of the process
- of guidance/innovation on the process

Possible position to take in the future: \_\_\_\_\_

Level of intervention:

- operative/execution on the process
- of regulation of the process
- of guidance/innovation on the process

Tasks and activity to carry out personally:

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Budget to manage: \_\_\_\_\_

Tools and devices to be used:

- hand tools for shop or office
- electric machineries for hand use in shop or in office
- machine tools or robotized automatic systems
- information equipment for calculation and office
- IT infrastructure for management of processes
- means for logistics transport and move
- special technologies
- Other (specify) \_\_\_\_\_

System of relations to be activated:

with people within the company who are part of the same area of activity (specify who they are and the aim of the relation)

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with people within the company who are part of a different area of activity (specify who they are and the aim of the relation)

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with people outside the company (specify who they are and the aim of the relation)

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**Description of competences already acquired**

Worker's competences	Level			
	Minimum	Medium	High	Excellent
<b>Attitudes</b>				
<b>Knowledge</b>				

Capabilities	Minimum	Medium	High	Excellent

### **Annex 3 a - ATTITUDES**

- What do we intend for Attitudes?

Attitudes are the psychological component of competence (personal characteristics, attitudes and inclinations), that is also influenced by environmental and social factors embedded in the company organization (motivations to work).

#### Examples of attitudes:

- spirit of enterprise
- capacity of concentration
- independence, autonomy
- resistance to stress
- flexibility
- openness to change
- discretion, privacy
- helpfulness
- result/task-orientation
- relationship- orientation
- reliability
- order and precision
- high/low motivation put into work
- critical thinking
- etc.....

### **Annex 3 b - KNOWLEDGE**

- What do we intend for Knowledge?

Knowledge is the theoretical, logical-abstract and procedural component of competence. It can be divided into:

- 1) Know how: “to know how to do”, understanding of procedures that enable the worker to intervene with expertise in the process operations within the field of activities
- 2) Know what: “to know what to do”, a declarative knowledge which enables to describe and interpret the properties relating to objects, tools, techniques and technologies used within the field of activities
- 3) Know why: “to know why to do”, a predictive-explanatory knowledge of logical-causal type that enables to evaluate the innovative alternatives in the field of activities and to forecast new outcome effects

#### Examples of knowledge:

- Knowledge of relevant company organization
- Knowledge of company procedures referring to employee's job position
- Knowledge of administration, finance and management control
- Knowledge of electrical engineering
- Knowledge of national and international laws and regulations on logistics and transports
- Knowledge of materials engineering
- Knowledge of communication and marketing
- Etc....

### Annex 3 c – SKILLS

- What do we intend for Skills?

Skills are the implementation components of competence and they are but the practical abilities put into action by an individual at work. They are divided in:

- Technical-operating skills: technical abilities that a person has in relation to the object of his work
- Managerial skills: ability to redeploy and optimize human, economical, tangible and intangible resources in the field of activity
- Cognitive skills: *problem solving* and *decision making* skills. To be able to find innovative solutions to different organizational problems
- Social skills: to be able to communicate and relate with a variety of interlocutors inside and outside the company

#### Examples of skills:

- Technical-operating skills:
  - to be able to use office ITC tools
  - to be able to program machine tools (Numerical Control Machines)
  - to be able to make a market analysis
  - to be able to make a financial plan / balance the books
  - to be able to install and maintain a thermohydraulic system
  - to be able to make a business phone call in English
- Managerial skills:
  - Plan and organise one's job
  - Plan and organise one's and other people's job
  - Orient co-workers towards goals
  - Follow up and evaluate one's teamworkers job
  - Delegate effectively tasks and responsibilities
  - Manage and chair workshops and meetings
- Cognitive skills:
  - Analyse and suggest solutions
  - Making decisions and accept responsibilities
  - Evaluate different alternatives with critical thinking
  - Capacity of analysis and ability to synthesize
  - Solve work problems with proactive and constructive attitude
  - Turn decisions into actions
- Social skills:
  - Communicate effectively with internal and external interlocutors
  - To have public speaking skills
  - Teamworking, cooperate
  - Inform adequately

- Listening ability
- Negotiate and act as intermediary
- Persuade
- Manage conflicts

### **Tool 4 – Structured Coaching session (Exploration)**

<b>Step</b>	<b>Coach</b>	<b>Coachee</b>
<b>Opening of the session</b>	To look for attention. To agree on the start	
<b>Identification of the topic</b>	Explore Clarify Identify	
<b>Identification of goals</b>	To set at least one possible goal that the coachee identifies with reference to the topic decided	
<b>Basic paraphrase</b>	Paraphrase, summarize with request of full sharing from the coachee	
<b>The point achieved</b>	What do you think to have achieved during this session?	
<b>Session closing</b>	Do you agree to end here the session?	

## Tool 5: Proposal of training to the management

<b>Coach</b>	
<b>Worker</b>	
<b>Starting situation</b>	
<b>Training needs as describe by the worker</b>	
<b>Training Provider (if proposed)</b>	
<b>Training costs (if known)</b>	
<b>Reasons of the training need</b>	

### Decision of the management

<b>Proposal submitted on the day:</b>	
<b>Decision:</b>	
<b>Signature of the management:</b>	

## Tool 6 – Competences to be acquired by the coachee on the basis of the company development plan

*N.B: this Tool has to be filled in by the management*

### **Description of the Area of activity**

Position: \_\_\_\_\_

Level of intervention:

- operative/execution on the process
- of regulation of the process
- of guidance/innovation on the process

Possible position to take in the future: \_\_\_\_\_

Level of intervention:

- operative/execution on the process
- of regulation of the process
- of guidance/innovation on the process

Tasks and activity to carry out personally:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Budget to manage: \_\_\_\_\_

Tools and devices to be used:

- hand tools for shop or office
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System of relations to be activated:

with people within the company who are part of the same area of activity (specify who they are and the aim of the relation)

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with people within the company who are part of a different area of activity (specify who they are and the aim of the relation)

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with people outside the company (specify who they are and the aim of the relation)

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**Description of expected competences**

Competences to be acquired	Level			
	Minimum	Medium	High	Excellent
<b>Attitudes</b>				
<b>Knowledge</b>				

Capabilities	Minimum	Medium	High	Excellent

## **Annex 6 a - ATTITUDES**

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### Examples of attitudes:

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- helpfulness
- result/task-orientation
- relationship- orientation
- reliability
- order and precision
- high/low motivation put into work
- critical thinking
- etc.....

## **Annex 6b - KNOWLEDGE**

- What do we intend for Knowledge?

Knowledge is the theoretical, logical-abstract and procedural component of competence. It can be divided into:

- 4) Know how: “to know how to do”, understanding of procedures that enable the worker to intervene with expertise in the process operations within the field of activities
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### Examples of knowledge:

- Knowledge of relevant company organization
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Etc....

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#### Examples of skills:

- Technical-operating skills:
  - to be able to use office ITC tools
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  - to be able to make a financial plan / balance the books
  - to be able to install and maintain a thermohydraulic system
  - to be able to make a business phone call in English
- Managerial skills:
  - Plan and organise one's job
  - Plan and organise one's and other people's job
  - Orient co-workers towards goals
  - Follow up and evaluate one's teamworkers job
  - Delegate effectively tasks and responsibilities
  - Manage and chair workshops and meetings
- Cognitive skills:
  - Analyse and suggest solutions
  - Making decisions and accept responsibilities
  - Evaluate different alternatives with critical thinking
  - Capacity of analysis and ability to synthesize
  - Solve work problems with proactive and constructive attitude
  - Turn decisions into actions
- Social skills:
  - Communicate effectively with internal and external interlocutors
  - To have public speaking skills
  - Teamworking, cooperate
  - Inform adequately
  - Listening ability
  - Negotiate and act as intermediary
  - Persuade
  - Manage conflicts



**3) Share with the employee and describe in the following chart the goals that are foreseen in the project of professional development**

N° obj	Goal description	Actions to take and time schedule	Ways to estimate goal achievement
1			
2			
3			
Ecc ...			

**4) Describe the possible binding elements in the employee's personal dimension and in the work environment**

The influence of health

- Are there any long-term restrictions due to particular health conditions?  
yes · no ·
  
- If yes, please describe them \_\_\_\_\_  
\_\_\_\_\_
  
- Do these long-term restrictions have any influence on the carrying out of the present /future employee's job?  
yes · no ·
  
- If yes, please describe \_\_\_\_\_  
\_\_\_\_\_
  
- If the answer is yes, is it possible to improve the situation by means of some back-up activities?  
Improved · solved · no ·
  
- If yes, which measures that can improve health could be introduced/suggested?  
\_\_\_\_\_  
\_\_\_\_\_

The influence of personal interests

- Are there any employee's personal interests that may influence the achievement of the employee's development work goals?  
yes · no ·
  
- If yes, please describe them **Positive influence:** \_\_\_\_\_  
\_\_\_\_\_  
**Negative influence:** \_\_\_\_\_  
\_\_\_\_\_

- If yes, how can the positive influence of personal interests be useful to reach development goals?

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- If yes, how can the negative influence of personal interests can be turned into positive influence to reach development goals?

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- Are any back-up measures needed? yes · no ·

If yes, please  
describe them

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### The influence of private life

- Are there any conditions of discomfort in the employee's private life that may prevent development goals to be achieved?

yes · no ·

- If yes, please  
describe them

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- If yes, is it possible to improve the situation by means of some back-up measures?

improved · solved · no ·

- If yes, which back-up measures could be suggested?

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## Tool 8 – Structured Coaching session (Monitoring)

Step	Coach	Coachee
<b>Opening of the session</b>	To look for attention and agree and the starting	
<b>Focus on the goal</b>	To take the coachee through the evaluation of his/her professional development plan	
<b>Identification of personal steps</b>	What are the steps to achieve this aim?	
<b>The check</b>	How to check the achievement of the goal and intermediate results?	
<b>Commitment</b>	Summarize and ask for confirmation of the commitment	
<b>The point achieved</b>	What do you think you have achieved during this session??	
<b>Closure of the session</b>	Do you agree to close here this session?	

## Tool 9 – Evaluation of the external training attended

Title of the course \_\_\_\_\_

Period of training \_\_\_\_\_

Place of training \_\_\_\_\_

**Degree of training satisfaction**

	++	+	-	--
Reception	.	.	.	.
Support by the trainer	.	.	.	.
Was the number of participants adequate?	.	.	.	.
Organisation (breaks etc.)	.	.	.	.
Was the time schedule kept?	.	.	.	.
In-depth treatment of topics	.	.	.	.
Lessons understandability	.	.	.	.
Practical relevance of training in the participant's work	.	.	.	.
Appropriateness of training methods	.	.	.	.
Documents/materials provided to participants	.	.	.	.
Trainer's competences and knowledge	.	.	.	.
Flexibility and helpfulness towards participants	.	.	.	.
Exercises, case studies, real life examples	.	.	.	.
Was the trainer able to listen to and meet participant's needs?	.	.	.	.

• **Conclusions**

Usefulness for employee's work: has the training increased employee's competences helping him/her to carry out tasks in a better way?

. very good    . good    . fairly good    . sufficient    . insufficient

Have the expectations been fulfilled?

. yes    . only in part    . no

Duration of training

. too long    . right    . too short

According to the participant, the training has been:

. too demanding    . right    . too easy

Which part of the training was best appreciated?

What could be improved?

Which part of the training could be broadened?

Which part of the training should be shortened?

Are you interested in attending advanced training events on the same topic?

. no    . yes    If yes, what should be taken into account?

## Tool 10- Final evaluation of the path carried out with the worker

- Write out the goals that had been agreed with the coachee in the project of professional development in the following chart (Tool 7)

N° obj	Goal description	Actions to take and time schedule	Ways to estimate goal achievement
1			
2			
3			
Ecc ...			

- For each goal, please indicate the extent to which it has been achieved

### Evaluation standards:

The evaluation refers to the achievement or non achievement of the goals previously agreed. For each entry it is necessary to express a judgement ranging from 1 to 4 according to the following parameters and provide motivations:

<b>Score 1: UNACCEPTABLE</b>	<b>Score 2: ACCEPTABLE</b>	<b>Score 3: GOOD</b>	<b>Score 4: EXCELLENT</b>
=  <b>Goal Missed</b>	=  <b>Goal Achieved, but there are margins for improvement</b>	=  <b>Goal Achieved</b>	=  <b>Goal Exceeded</b>

## Evaluating the achievement of previously agreed goals

Goal	A1: Achievement of work goals assigned	A2: Respect of time schedule in the achievement of goals and deadlines envisaged by work	A3: Autonomy in the execution of foreseen tasks and activities	A4: Acquisition of required knowledge and abilities	MEAN																																
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• **Evaluation of the accomplished coaching process**

- Do Coach and Coachee consider the number of meetings during the learning/development pathway as adequate and effective?

yes ·            no ·

- If no, please motivate your answer \_\_\_\_\_  
\_\_\_\_\_

- What are the positive aspects detected by the employee (coachee) in the structured coaching action that s/he has received?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- What are the critical points detected by the employee (coachee) in the structured coaching action that s/he has received?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- How effective was the structured coaching action according to coach evaluation? Describe here the strong and weak points.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date \_\_\_\_\_

Company Coach Signature \_\_\_\_\_ Coachee Signature \_\_\_\_\_

## Tool 11 – Final report to the management

<b>Coach</b>	
<b>Worker Coachee</b>	
<b>Date of start and date of finish of the coaching process</b>	
<b>Short description of coachee's development goals</b>	
<b>Short description of results achieved with reference to the professional development plan</b>	
<b>Costs</b>	
<b>Benefits</b>	
<b>Conclusions and remarks by the company coach</b>	
<b>Conclusions and remarks by the coachee</b>	

Date \_\_\_\_\_

Coach Signature \_\_\_\_\_

Coachee Signature \_\_\_\_\_