

## Coaching agreements

There are many coaches out there coaching many people.

In some situations the coaching has been formalised with someone engaged specifically as “the coach,” while in other situations coaching is being done by senior members of the team as a component of their day job.

Sometimes the coaching is excellent and you can see real, tangible improvements, but sometimes it is lame and disappointing.

In fact, in the worst case scenario, a team member might get to meet their coach for the first time and hear the following, rather strange introduction:

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*Hi, I'm James. I'm your assigned coach. Just carry on and at random times I will suddenly coach at you. It will be great.*

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So the coaching agreement is where the people coaching and being coached form a shared understanding of what they expect will happen.



The coach and the person or team being coached agree to the purpose of coaching and the approach to take.

What does coaching agreement contain?

I apologise if the next section seems obvious, but I am going to break things down to a very basic level. If you are going to coach someone then you should be able to utter the following sentence:

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*I will coach them*

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In order to say this, you need three to understand three ingredients that you will need for the sentence to be true:

- A coach to do the coaching;
- A person or team to be coached; and
- Some coaching that will be done.

While this may seem obvious, it is important.

If you coach someone then they want to know who you are and what they can expect from you. Will you share what they are saying with their boss? Are you a super-expert in agile with nuclear fusion projects? Can you help with testing?

You also need to understand what they expect from you, so you know whether their expectations are fair and so you can meet their expectations.

Similarly, in order to coach someone you need to know who they are and where coaching might be of use to them. They also need to know what you expect from them.

Finally, coaching is not just “catching up for coffee.” So both you and the person being coached need to understand the goal of the coaching and the approach you will take.

### Does this mean we need to document something?

#### Alliances and contracts

With some of my clients, we talk about both a coaching alliance and a coaching contract.

In this specific situation:

- The coaching alliance is the shared understand that the team and the coach have. It can be informal and undocumented.
- The coaching contract expands on the coaching alliance by agreeing with “management” what they should expect ... and what we expect of them. It can also be informal and undocumented.

At other clients though, I use the word agreement. So we have:

- An agreement between the coach and the person or team being coached; and
- If the person who I am coaching is not the one who engaged the coach, we have an agreement with the person who engaged the coach as to what they expect and what they are expected to do.

Either way, the partners in the coaching relationship sit down together to align on the goals, focus an approach for the coaching they are about to embark on. This sets the scene, clarifies expectations and gives everyone something to refer back to during the journey.

While I say that these agreements can be informal and undocumented, I prefer to document them. This forces everyone to stop and think about what they are agreeing on. So the process of getting to the document helps create the shared understanding.

The document is not actually important though, it can be changed in any coaching session if the coach and person being coached agree. But again, agreeing to the change requires that we have a shared understanding.

#### The coaching plan or journal

When I coach someone I usually ask them to keep a journal. They use this to write down a goal, write comments and notes and sometimes to actually update it as they go. I have found that the journal is a great way to maintain focus. But it is not an agreement with me, it is the person's journal.

I also keep my own notes and record the next goal, or observations etc. This helps me make sense of things as we go along.

When I coach teams, the journal does not scale. So I usually have some kind of evolving coaching plan. This might be as simple as having tasks or things to work through or it might be as complex as having a planning session and a review session with the whole team that focuses on the coaching.

So in some cases there is a coaching agreement, a wider agreement with stakeholders and a coaching plan. Each of these can be useful, or just time consuming. So my advice is this

Always create a coaching agreement with the person or team you are coaching. Document it and refer back to it to see how your expectations have changed as you go on the journey.

So now that you know what a coaching agreement is, how do you create one?

## Creating the initial coaching agreement

### Agreement implies collaboration

Coaching begins when the coach and person being coached agree to start, so we can think of the coaching agreement as the first step in the coaching journey.

But, in order to reach agreement, you need to form a shared understanding about what you will agree to. So the coaching agreement can be thought of as an artefact (the outcome of our agreement) or a process (the process of coming to a common understanding).

So let's look at the process for reaching an agreement, before we tackle the template for capturing that agreement.

There is no magic to reaching agreement, it is just a matter of listening, clarifying and confirming what we hope to achieve. But there is a pattern that I follow when engaging in a coaching relationship.

### An approach to reaching agreement

This is the process that I generally go through. It is my own practice rather than best practice, so feel free to adapt it to work for you.

STEP	EXPLANATION
<b>ENGAGEMENT</b>	Meet each other and agree that it is worth discussing the possibility of coaching. The goal here is to <ul style="list-style-type: none"> <li>• Meet each other and agree that a relationship is worth considering</li> <li>• Gain permission for discovery and goal setting</li> </ul>
<b>DISCOVERY</b>	Learn about the context in which the person being coached is working in, without having to lock down an approach. Potentially also discuss different development options such as coaching, but don't feel that you need to have a clear plan yet.
<b>FOCUS</b>	Agree that, based on what we learned in discovery, there is one or more areas worth looking into more deeply
<b>HUNCH</b>	Propose what you think the goal is going to be and how you will probably achieve it. <b>At this point I do a coaching agreement.</b>
<b>LEARN AND EVOLVE GOAL</b>	Start coaching and learn more about what is working and what is not. In theory this means that the agreement has changed, but I am often lazy with the paperwork unless there is a substantial shift (a "Pivot" if you like)
<b>CHECK /END</b>	Stop and assess whether you achieved your goal. Often you have not fully achieved it, but you have found some other good stuff.

### A little more detail

Your coaching assignment will differ depending on who you are coaching, why and in what. So I will not try to accommodate all the possible permutations here. But if you are interested, then you can work through these steps to see if my comments help.

### Engagement

Coaching is relationship based, so the people involved need to build rapport and trust. Just as importantly, they need to feel that they have permission to explore, negotiate and agree the coaching approach. They should be in control and they should be willing to commit to something they see value in.

For an individual this often means having a cup of tea and discussing in general terms the context in which coaching might occur and the value that we might be able to get out of it.

For a team, I often meet with them to explain that I will do a “discovery” thing. This might be a workshop, or a couple of days of observation and discussion. Based on this we will find a focus and then be able to commit to something reasonable.

### Discovery

In discovery I seek to learn, rather than project solutions.

This is where I might use an agile health check for a team, or I might do a current state analysis. But I will not be working on everything I observe and in some cases I might even come to the conclusion that there is a better solution than coaching.

Working with a facilitator or coach, I have a dodgy “rubric” and sometimes use that. I run through it with the person, ask where they think their might be some things to look at and then I often observe them to form a hunch. But this assumes that we are going to be coaching in a known domain with specific skills to work on. This is not useful for generic coaching.

For an individual for whom I am not sure where they should be awesome, I usually do a discovery session.

I start with open questions like these

- What do you do?
- How is it all going?
- How did you get here?

Then I stop and say – “let’s talk coaching”

- Let’s look at where you are now – Who really depends on you being successful?”
- Coaching is about building on where you are now to learn new ways of working or learning new things or something like that.
  - Where is your learning taking you? Where would you like it to go?
  - How is your learning going?
  - If there was an ideal next step, what would really help you with your learning?

The term “your learning” may seem generic. You could change this to “your agile journey” or “your role.” That is all good. But I do want to actually concentrate on what learning might be useful.

- I want to find out how clear and confident the person is about why they are doing things and where the value is. If they are not then this is the first focus for my coaching – Where is the value that they can pursue? How can they discover and validate this?
- I want to understand what goals (if any) the person has for their own development. Again this gives me a starting point for the rest of the conversation, even if they have no idea.
- I don't want to get stuck on specific issues or problems
- I don't want to end with "The boss says I should do more agile stuff – so I guess I have to"

### Focus

Sometimes the person being coached can highlight a development focus straight away. But often there are many possible things that are going on and there is a lack of focus.

So my goal here is to narrow down one area where we can focus, that will shift things in the right direction.

So I ask myself these three questions while having a cup of tea at my desk:

- What is going on with them?
- How do I know?
- Why does it matter?

Based on that I form a hunch as to where we could focus our effort.

### Hunch

Sometimes people are surprisingly clear where they think we can start, so I am driven by this.

Sometimes I am a bit directive (if I have my rubric or health check in hand) but it is still my hunch, not a verified fact. They might agree something is important but feel that it is the least important area for them to focus.

Most of the time I have my own hunch and I need to find out theirs. Either way my goal here is to

- Agree we will not try to change the entire world in one hit;
- Agree on a shared "hunch" that we can commit to start on; and
- Agree that it is our current hunch, and it needs clarification before it is a goal. Also, it might turn out to be wrong as soon as we start.

This is the same for a person or a team.

Now I am good to go. But I still want to confirm what "good to go means."

### Learning and goal

Sometimes my first workshop with the team is to agree to what we are going to focus on. I present my hunch, or the outcome of their self-assessment and we break it down into:

- Our first goal or target to focus on; and
- How we will go about working together to achieve that goal.

Often coaching is part of the solution and the team can also agree to other things they can do without me.

Sometimes my first session with a person is to clarify the goal and commit to the first step in moving in that direction.

Either way, the outcome here is to go from a hunch to a specific goal and approach to explore that hunch.

The goal can be broad like this

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*Coaching will provide you with time for reflection while you explore your leadership with the new team*

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Sometimes it will be a specific target

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*To explore better ways to DELEGATE and DISTRIBUTE WORK in order to REDUCE the cognitive load on delegation victims.*

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The approach needs to also confirm what both the coach and the person being coached agree to do. The goal and approach then get locked in as “the agreement.”

#### Check/end

I am not a believer in perpetual coaching. I think each coaching relationship evolves constantly and can go stale. So I like to give it a limited life. Typically I aim for 6-8 weeks for performance or team coaching.

In agile terms that often means 3-4 sprints but it is also as far out as I am good at predicting and sticking to a goal. So the real reason is that it helps me focus just enough to be disciplined as a coach while still allowing for emergent opportunities. I suppose the reason should be to do with the person being coached, but I often just say at the outset that I think this is a good planning horizon.

Once the agreement comes to and end then there are really three options:

- End the relationship because the goal has been achieved or the focus has changed;
- Re-commit to continue toward the same goal, but revisit the focus area and hunch;
- Go right back to the discovery phase, scan the environment and decide again if the next step is coaching. If could for example be training or just practice, then you might come back to coach again.

## Related agreements and things

### The coaching contract



The coach and the person "paying for" the coaching agree to the purpose of the coaching engagement and how it will work.

In some cases, you will coach someone because you and they think it is worth doing, but nobody else is really interested. In other cases, the person being coached might not be paying for the coaching, or their manager might have asked you to get involved, before your potential victim had a say in things.

So the coaching contract is the agreement between all parties. It does not include all the detail as the coaching agreement, but does include organisational expectations.

In some cases, I have included other stakeholders in the coaching contract too. For example if there are multiple coaches working with multiple people across a group, I have one contract for the whole gang.

In some cases, I have a coaching contract with the boss and then I don't share this with the team. This is not because I have a hidden agenda but rather because it contains things like payment rates, or because it duplicates the information in our coaching agreement. In this case though, I have to always remind myself that all parties in the coaching need to come to the same shared understanding of what is going on.

### The coaching Journal or plan



The person being coached might keep a journal of their journey, to look back at progress and especially to bring focus to the next step.

A coach and team might cocreate an evolving coaching plan to do the same thing

The coaching agreement sets the scene, the coaching plan evolves each coaching session to identify the wins, lessons and issues.

It also provides the next steps. It is like taking a product roadmap and turning it into a sprint plan in an agile team. The process is to simply assess where you are at, explore the current challenges and goals of the person being coached and then lock down what will happen next.

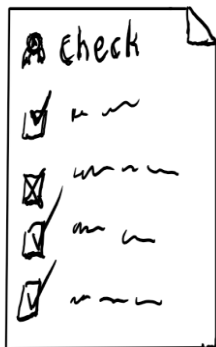
For a single person being coached, we can still have a coaching plan, with short term goals and comments etc. But in practice I usually have a coaching journal instead. Both the coach and the person being coached have their own journal and it is their record of what the focus is now, and where the journey has taken us.

A lot of people just use their existing notebook and take notes in that, rather than having a special journal. That is fine, but I refer back to the journal each coaching session.

I also take my own notes and record goals and assessments in my own journal when I am coaching.

### The assessment tool

In some cases I have a “coaching rubric,” or an “agile health check.” These exist as a prompt to clarify the areas we want to focus on and to assess whether the coaching is making a difference.



The coach and person being coached might use a rubric or health check to baseline where things are at and guide them to focus on specific areas for improvement

The assessment can be a meeting or an artefact. My preference is to structure it as a discussion between the coach and the person being coached.

The assessment can include stakeholders who are not being coached, for example the customer or team boss. But it is an assessment of the value of the coaching, not an assessment of the person being coached.

The purpose is to:

- Provide feedback to the person being coached so that they can use that feedback for improvement; and
- Provide feedback for the coach to help him or her focus their coaching on the right things and to improve the way they coach.

This makes it tough though, because the assessment tool must provide frequent, specific and useful feedback to help the person being coached and to help improve the coaching approach. It must also be a tool that assists the person being coached, not a painful bureaucratic thing that distracts from valuable learning time.

So in practice I often have some assessment tool (a health check or a baseline) to use at the start and end of each coaching agreement. Then I might have an informal tool (rubric or set of values) to use when giving specific feedback along the way.



## Appendix 1 – sample coaching agreement

### Context

Linda wants to work on delegation and stuff, so we have agreed that some coaching will help.

James will be the coach.

### Delivery

We will hold a 2 hour session once a fortnight, either over zoom or onsite. The session will be on Tuesday at 10 am to start with and the first session is next Tuesday.

We will do this for 6 weeks and then reassess.

### Goal

Linda wants to improved here delegation to bring the team greater luck

### Related activities

This is it, we are not coupling this with training or anything

### Expectation of Linda

Linda will turn up on time and bring a pen and paper. She will also dedicate about half a day a week to this coaching and will yell out if it's not coming together

### Expectation of James

James will keep things to himself. He will also listen and stuff

### Assessment

We will google "Did coaching help Linda improve" in 6 weeks.

## Appendix 2 – sample coaching contract

Coaching	Linda Notreal	Period	1/12/17 – 15/1/18
Coach	James King	Engaged by	Biggam Alroundiam

### Introduction

This agreement is designed to clarify the purpose and scope of coaching. The aim is to have the 3 people involved aligned on what we are doing.

### Background

Biggam asked James to come and see if he could help Linda and her team. We performed an initial assessment and decided coaching would be beneficial and we have captured our expectations of what that will look like here.

### Our focus

#### Context and drivers

Linda has recently become the manager for the agility release team.

- The team are focused on improving their:
  - Reduction of engagement paper work; and
  - Improving the quality of the post-deployment boat cruises
- Linda wants to improve her leadership, specifically around
  - Acting as a role model in an agile team; and
  - Actively helping the team achieve its goals rather than focusing on her own work

### Alignment of coaching

This will help Linda achieve her goals by providing feedback and time to reflect on the impact she is having, what is making it hard for her to have an impact and what she is doing that is working.

### Specific short term coaching objective

The objective for the coaching over this period is to:

- Build team radar to better understand the state of the team
- Build flexibility in negotiation to better adapt to multiple situations

Specific goals are agreed between Linda and James and will not be shared outside their discussion

### Comments on scope

James will work directly with Linda and will be onsite with Linda in meetings or with teams from time to time. But he is not engaged to coach the team directly.

### Assessment

We have asked for feedback from 2 stakeholders who we think are in a good position to provide subjective comments. We are also baselining the current time spent by the team on paperwork and will review whether this has changed at the end of the period. All this information will be provided to all three parties.

## What do we need to do?

### Coach commitment

James will be available for a formal catch-up once per fortnight for 2 hours. This can be done onsite or over a Zoom meeting. He will also spend between half-a- day per week observing Linda in action

### Person being coached commitment

Linda will turn up for each session and will also be spending ½ to 1 day per week working on the areas that she and James agree are the current focus at any one point

### Engagement manager commitment

Biggam will be involved in regular 1-1 meetings with Linda and will attend one session at each of the start and end of the period to assess the value and direction of the coaching. He will also support Linda in allocating the time needed to attend the coaching.

### General things to be aware of

The team is involved in a transformation and Linda is working with the “LEAN-Stacking” team to facilitate that change. This is not related to our coaching.

Restructures happen every 12 weeks here. If one hits during our coaching, we will finish the current contract and then make a call as to what to do next

### Assessment of the value of the coaching

Linda and Biggam will discuss the value of the coaching at the end of each period, as part of Linda’s wider career development plan. All three parties will also hold a retrospective on the effectiveness of the coaching process at the end of the period.

### Signatures, costing and related logistics

We know we should all sign this but we thought we would get away with communicating it via email.

Biggam provided a charge code so we are all happy that James will be paid and that he will turn up.

Normally we would clarify the charging for books, stationery, travel and accommodation if it is needed, but we were quite busy.

Maybe we should be a bit more formal but nobody is too concerned about money around here. What could possibly go wrong?

Here is a blurb on James – he is a coach and this is part of the coach2awsome program we are running