Coaching Plan Template

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| --- | --- | --- | --- |
| **Objective and benefits** | The purpose of this document is to help project managers and change management specialists plan how organisational leaders will be supporting the employees or key stakeholders who are impacted by the change initiative. | | |
| **When to use this tool enabler** | Coaching delivered as part of a leadership action plan, is an ongoing effort through the project lifecycle. As such, coaching planning needs to occur at the initiation of the project. | | |
| **Document owner** |  | **Intended audience** | Project lead /manager Change specialists |
| **Version** | 0.0 | **Last Updated** | INSERT DATE |

# 1 Introduction

The project team will need to review and design a set of coaching activities that will support the change initiative through all the project stages.

The coaching plan will provide a supportive set of activities that will provide guidance to managers and supervisors of the impacted area to understand the changes, become sponsors of the changes, and support their employees during the change. The three main objectives of the coaching plan are:

1. Prepare managers/supervisors to understand the changes underway
2. Develop competencies for managers/supervisors to manage the change
3. Provide managers/supervisors with tools and skills that will enable them to lead their employees through the specific change

A coaching plan benefits both the manager/supervisor and the employee by setting a course for consistent coaching efforts across a development cycle and formalising change management efforts to ensure employees are moving along the change commitment curve.

**How does the coaching plan fit into the overall change management strategy?**

Coaching success is measured by employees’ improvement in their understanding of the specific change impacts to their MDA. Effective coaching can alleviate resistance and build support for the changes.

The coaching plan will ensure managers and supervisors have the right tools and support they need to turn around and engage their employees through the change journey and commitment lifecycle, taking them from awareness to understanding to engagement to involvement to commitment.

# 2 Project background

This section should provide a general overview of your project including the case for change and should be completed by you or the project team. Information can be drawn from the project profile and case for change.

# 3 Target audience of coaching plan

The section defines who the targeted audiences are for the coaching plan within your project, programme, or initiative.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No.** | **Impacted MDA** | **Head of MDA** | **Direct Managers** | **Indirect Managers** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |
| 8 |  |  |  |  |
| 9 |  |  |  |  |
| 10 |  |  |  |  |

## 

# 4 Coaching plan delivery

## High-level timeline

The Coaching Plan is mapped to the key stages of the programme or project. Each phase focuses on a different component of the Coaching Plan process which complements the project implementation lifecycle. Possible focus areas depending on your programme or project are outlined in the table below:

|  | ***Define Outcomes***  *(XX 2021 – X 2021)* | ***Design  Outcomes***  *(XX 2021 –*  *XX 2021)* | ***Deliver Outcomes***  *(XX 2021 –*  *XX 2021)* | ***Transition Outcomes***  *(XX 2021 –*  *XX 2021)* | ***Close Outcomes***  *(XX 2021 –*  *XX 2021)* |
| --- | --- | --- | --- | --- | --- |
| **Outcome** | Defining Coaching Plan | **Focus:** Enable understanding of change impacts and begin to develop competencies to become effective coaches and change coaches. | **Focus:** Ongoing engagement of change coaches to facilitate two-way feedback | **Focus:** Ongoing engagement of change coaches to facilitate two-way feedback | **Focus:** Ongoing engagement of change coaches to facilitate two-way feedback support |
| **High level Actions** | Defining Coaching Plan activities | **Activities:**   * Complete Manager review and follow-up meetings * Conduct coaching sessions focused on how to lead change * Deploy Readiness Assessment | **Activities:**   * “Leading Change” – coaching sessions * Regular touchpoints between managers and project change team | **Activities:**   * “Leading Change” – Coaching sessions * Regular touchpoints between managers and project change team | **Activities:**   * Regular touchpoints between managers and project change team |
| **Expected Time Commitment** | N/A | **Hours per month** | **Hours per month** | **Hours per month** | **Hours per month** |

## Understand changes underway

The first objective of the Coaching Plan is to enable managers and supervisors to understand overall impacts of the programme or project, as well as specific impacts to their Ministry, Departments and Agencies (MDAs).

As a follow-up to one-on-one meetings, the project change team will engage select managers and supervisors of directly impacted MDAs to introduce the programme or project (timeline, objectives, benefits), explain the approach to change management, as well as propose upcoming change management activities.

## Key engagement activities

[The table below provides an example of engagement activities; you and your team can customise as you see fit.]

| **Activity** | **Objective(s)** | **Recipients** | **Results** |
| --- | --- | --- | --- |
| **Change Readiness Assessment-1**  (xxx Month) | * Gauge business’ understanding of programme and project readiness through baseline set of questions | * Key Directors and Managers who participated in the Plan/Analyse phase and/or Design-Build-Validate kick-off | * Clarity on the gap between current and future state |
| **Manager Overview Meetings**  (Month x – Month y*)* | * Introduce the programme or project, guiding principles, KPIs, benefits * Present programme or project timeline * Discuss change management approach to change initiative * Propose upcoming change management activities | * Managers and supervisors of impacted departments, and/or those identified by directors in one-on-one director meetings | * Clarity on the issues that need to be addressed to prepare managers and staff for the change |
| **Manager Follow-up Meetings**  (Month X – Month Y) | * Validate that change roster includes the latest snapshot of MDA * Identify impacted roles by mapping personas to the individual / stakeholder groups * Nominate change agents for the change agent network | * Managers and supervisors of impacted departments, and/or those identified by directors in one-on-one director meetings |  |

## Develop competencies for managing change

The second objective of the Coaching Plan is to prepare managers and supervisors to become effective change coaches by developing competencies for managing change. For managers and supervisors to realise and embrace their roles as change coaches and coaches, they must first understand the fundamental concepts of change management.

Key competencies for leaders to lead change include:

|  |  |
| --- | --- |
| **Leadership competencies for managing change** | |
| Lead by example | Being a sponsor of the change and leading by example |
| Active listening | Addressing employee concerns through active listening and constant communication |
| Communicate | Answering questions about the programmes or project’s overall change impact and specific impacts to the MDAs |
| Reinforce | Celebrating quick-wins to reinforce change adoption |
| Remove barriers | Identifying areas of resistance and removing barriers as needed |

Key challenges for leaders when managing change include:

1. Not accepting responsibility for their role as change coaches
2. Ignoring the change by assuming change adoption will happen on its own
3. Inability to manage resistance appropriately due to fear, empathy or misunderstanding the root cause of resistance
4. Resisting the change occurring within their MDAs due to under or over-estimation of change impacts
5. Insufficient or inaccurate delivery of communication

**Coaching activities**

[Customise the table below with the applicable activities]

| **Activity** | **Objective(s)** | **Proposed Tools and Methods** | **Outcomes** |
| --- | --- | --- | --- |
| **Leadership Self-assessment**  (Month X to Y) | * Pre-work assessment taken prior to Leading Change – Session 1 to gauge understanding of the programme or project, current change management skills and coaching competencies * Will be re-taken throughout the programme or project to track progress |  |  |
| **Leading for Change Sessions**  (Month X to Y) | * Interactive coaching sessions designed to introduce change management concepts and enable managers and supervisors to develop competencies for managing change within their MDAs |  |  |
| **Leading for Change**  **Follow-up calls**  (Bi-annual) | * Check-in follow-up calls proceeding in-person Leading for Change sessions to measure coaching progress, identify resistance factors, feedback from coaches |  |  |

## Lead and reinforce changes to employees

The third objective of the Coaching Plan is to enable managers and supervisors to introduce, manage and reinforce change with their employees. Once managers and supervisors have been enabled to understand the overall programme or project changes and specific changes to their MDA and activated to become change coaches and coaches, they are ready to lead and reinforce the changes with their employees.

[Customise table below with the applicable activities]

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Objective(s)** | **Proposed Tools and Methods** | **Outcomes** |
| **Employee forums**  *(Throughout the programme or project)* | Leverage existing employee forums (All-hands, one-on-one sessions, group discussions, etc.) to drive and reinforce change adoption with the employees | Coach activation toolkit 1 – provided to the manager/ supervisor to hold their own change session with their employees | Activation of managers/supervisors as change coaches, employees engaged and lead by coaches through the change journey |

**INSERT COACHING PLAN WORKPLAN ONCE CREATED HERE**

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# 5 Measuring and sustaining the coaching plan

To measure the progress and success of managers/supervisors’ coaching initiatives throughout the programme or project, various metrics will measure effectiveness of the coaching plan and inform how to adjust the plan along the way. Measurements will allow assessments of the coaching mechanisms and ensure coaches are adequately Leading for change, mitigating resistance and generating the necessary outcomes to support project success.

[Customise the table below with the applicable activities]

|  |  |  |  |
| --- | --- | --- | --- |
| **Metric** | **Approach** | **Scale** | **Competencies** |
| Visibly embraces the change by showing up at public forum and events | Tracking attendance; Readiness survey | Number of meetings, Agree Disagree | Being a sponsor of the change and leading by example |
| Attends Leading Change sessions | Tracking attendance | Number of meetings | Being a sponsor of the change and leading by example |
| Communicates and advocates the change | Readiness survey | Agree / Disagree | Addressing employee concerns through active listening and constant communication  Answering questions about the programme or project change impacts overall and specific MDA impacts |
| Understand role of a coach | Leading for Change – Leader self assessment | Agree / Disagree | Being a sponsor of the change and leading by example  Celebrating quick-wins to reinforce change adoption |
| Listens and takes action with employees | Readiness survey | Agree / Disagree | Identifying areas of resistance and removing barriers as needed |

## Sustaining the coaching plan

The Coaching plan and Leading Change sessions will be in effect throughout the life of the programme or project. The measurement approach above along with feedback from the coaches directly will help measure coaching success. Action plans, activities, communications, and engagement will be adjusted to ensure the coaches are enabled to successfully lead their employees through change.