The Coaching Playbook
A Four-Part Summary on How to Maximize Staff Performance
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For your healthcare organization to provide the highest quality patient care, you need your staff to be peak performers. But how can you ensure that everyone—from seasoned veterans to new hires—reach their full potential?

By offering coaching. Coaching’s long-term benefits to an organization’s success have long been proven. Over 70% of coaching recipients saw an increase in work performance, relationships, and communication skills, and 80% reported having more self-confidence.¹ It’s no wonder that over 51% of companies in the corporate sphere now consider coaching “crucial to their strategy,” and that 86% felt they recouped their investment.²

For healthcare organizations, it’s just as critical—perhaps even more so. Quality patient care depends on a well-trained, passionate, committed staff, which in turn is fostered by supportive, skilled leadership. Yet healthcare organizations are facing radical changes in everything from policy to technology, a loss of key leaders and clinicians due to the Baby Boomer exodus, and an increasingly dissatisfied—and overworked—labor force. Not to mention increased competition and the need to run ever-leaner while still providing the same level of care, despite an increased patient load. Nurturing engaged, curious employees and creating skilled, committed leaders are key to surviving and thriving amid all these challenges.

While organizations may offer ongoing learning and development opportunities, these are only part of the staff retention and improved leadership puzzle. Coaching is often the missing piece, the key to making training even more effective.

Read on to learn more about the world of coaching, how it can help team members realize their potential, and the positive impact it can have on an organization’s people and patient ROI.

1. What is coaching?
2. Who can be a coach?
3. How do you coach?
4. What are the benefits of coaching?
Coaching is an umbrella term for the process of developing people’s skills and abilities, boosting their performance, and dealing with issues and challenges before they become major problems. The meaning of coaching has evolved over the past few decades. Coaching used to be viewed as punishment, but now many see it as an essential part of making a bigger impact at their organization.
Coaching Categories

Coaching can work for anyone in your organization, and a study by Bersin & Associates notes that coaching is typically broken down into three categories and goals:4

Executive coaching

Leadership and capacity building coaching

Performance coaching

The more senior the staff member, the more likely they are to be coached by someone outside the organization. Lower-level colleagues will usually be coached by their direct superior, as in the case of an RN receiving one-on-one feedback and guidance from a nurse manager or supervisor. With coaching, though, it’s important to know that there are no steadfast rules. Coaching should be thought of as flexible – the most important part is that the coach, the student, and the organization all agree on the goals and process before the endeavor begins.
Coaching Relationships

Everyone – staff, coaches, and the organization – aims for success. Coaching can be the rising tide that lifts all boats, but at its core, it’s about creating and fostering a bond built around professional development. Take a look at the different types of coaching/learner relationships and the pros and cons of each.

Manager/employee relationships

At most healthcare organizations, managers typically know their own staff’s work history, aspirations, and values better than anyone. Thus, they can also have the biggest impact on their development and are often best suited to take on a coaching role. But because managers have such a big influence on an individuals’ professional growth, employees may feel they’re risking their own career progress by sharing certain feelings, especially if they’re critical of their manager or the organization. These relationships can be especially volatile in high-pressure work environments, common to the healthcare field where recipients face long hours, reduced resources, and often overwhelming stress in the face of life and death situations.

Third parties/employee relationships

The advantage of a third party is they’re able to offer a fresh, unbiased perspective. The student may also feel less trepidation about being completely open since their coach isn’t as involved in their advancement. However, as that coach may not know much about an employee’s background, goals, or learning style, it could take a while to build a level of trust and rapport, which may slow down the process.

Outside coaching

Coaching from outside the organization can present itself in two ways: 1) outside coaches can be brought in to train managers on how to coach other workers, or 2) they can be brought in to do the actual coaching. In the first scenario, the coach must be sure that the techniques they’re teaching can be adapted to who is going to be coached. In the latter situation, an outside coach can be hired to work directly with learners.

Coaching is all about developing the skills and performance of the recipient, but with so many considerations of how to get there, the process cannot be taken lightly. After deciding which style of coaching makes sense for both the organization and staff, leaders must then decide where the coaching should come from. In the next section, we’ll discuss who can be a coach and how to evaluate one, as well as how different coaching styles benefit your team in different ways.
Anyone can be a coach, but it’s critical to ensure they have the necessary skills to ensure a successful experience for both parties. In the healthcare field, a coach may need specialized training or comprehensive understanding of the industry’s many internal and external challenges, compliance regulations, and care standards.

A coach may be asked to put on different hats to help maximize a staff member’s talents. Coaches will also need to have a strategy in place. Their leadership can come in a wide variety of styles, and each one should be implemented strategically to foster your team’s growth.

There are six coaching personas – each benefit your team differently.
Coaching Personas

The *Harvard Business Review* found there are six types of coaching personas. Determine which type is most appropriate for your staff to gain the desired outcome:

- **Expert**
  
  Their value comes from advanced knowledge in a specific area. Experts’ authority comes from being the smartest person in the room.

- **Trainer**
  
  They can look at a worker’s job performance and show them how to do it better. Trainers may not be the best coaches if what needs improvement isn’t job-related. For example, a trainer can provide an administrator a better way to manage their time, but they may not be the best coach if the issue is that they don’t get along with colleagues.

- **Evangelist**
  
  These leaders spread a message and can rally people to a cause. People are motivated differently, so trying to inspire a team with one message may work on some employees but not others. Case in point: an evangelist for a nursing team will have a different message than one for the accounting department.

- **Coach**
  
  In this role, a coach will ask questions that guide team members down a path of discovering answers for themselves. Note that the coach persona is not an expert in a particular skill set, so they won’t teach your physicians how to advance their careers or manage their stress, but they can ask questions that will help the recipients discover their own roadblocks.

- **Mentor**
  
  They value long-term growth over immediate performance. Coaching is extended over a longer period of time, with the student meeting with the mentor for new insights and reflections on growth and goals. This role is similar to that of residents and supervising physicians, with the exception that mentoring is often one-on-one and more personalized.

- **Motivator**
  
  This persona helps others identify their goals and what they want to achieve. Keep in mind, though, that they may not be an expert in any particular field, so they likely can’t help a staff member with specific training.

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Does Your Coach Have a Playbook?

Before allowing a coach to engage with your team, make sure they have a plan in place to help you get the strongest return on your investment. There are no universal standards for what makes a great coach, but Forbes notes coaches should have a five-part strategy:

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<th>Clarity about the process</th>
<th>Seeks different viewpoints</th>
<th>Emphasizes real change</th>
<th>Has proven successes</th>
<th>Defines confidentiality</th>
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<td>A true coach will walk you through how they work, help individuals define their biggest challenges, and assist them in visualizing their future. They’ll also offer to teach new skills and/or behaviors and show how what students learn will help in their job. Be wary, though, of coaches who don’t offer much substance and appear to value enthusiasm for the teaching experience over offering any specifics.</td>
<td>Coaches will ask their student about their goals, challenges, and perspectives. But there are two sides to every story. A coach should ask those same questions to a student’s colleagues to create a more detailed picture of the situation. This enables coaches to provide insights and training that align with both the staff’s and the organization’s goals.</td>
<td>Great coaches should be more than a sounding board or someone to vent to. They need to teach additional skills, show how to change someone’s behavior, or develop a staff member’s situational awareness or knowledge base, and also demonstrate how these can be integrated into an employee’s job function. Occasionally being a therapist is fine, and even has some merit, but that shouldn’t be the foundation of coaching.</td>
<td>True coaching enables individuals to become stronger contributors to their organizations and coaches should be able to point to past successes as proof of their own abilities. First-time coaches should be able to lay out a comprehensive strategy that demonstrates their knowledge, past successes, and how their coaching will show a return on investment.</td>
<td>Coaches need to establish what is and what isn’t confidential. All parties should agree on what is allowed to be shared. Trust is the foundation of an honest, open coaching relationship, and employees need to feel safe when expressing their thoughts. If a coach is vague in defining what is confidential, or shares information that was agreed would be confidential, the relationship should be ended immediately.</td>
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Must-Have Coaching Skill Sets

In addition to the above, coaches should be able to offer intangible skills that enable staff to achieve a higher level of success. Whether a coach is “coaching your coaches,” or if a manager is coaching a more junior colleague, they should be able to:

1. **Listen actively**
   - Employees need to know that when discussing career aspirations and challenges, their coach is as invested in their success as they are. By being an active listener, the coach will be able to fully internalize and understand team members’ goals and offer meaningful solutions for impactful growth. Part of listening actively is not checking e-mails, not looking at a cell phone, or doing anything else that distracts from the one-on-one element.

2. **Reinforce positive behaviors**
   - A quality coach should reward their clients when they’ve made the right move or decision, rather than punish them for the wrong one. By rewarding correct choices, the staff member will display better performance-related behaviors as an instinct, rather than as something they have to think about doing before acting.

3. **Ask open-ended questions**
   - Asking “yes/no” questions, or ones that similarly offer a limited number of responses, are risky because respondents have to choose best-fit answers that may not paint the whole picture. Instead, a good coach will use open-ended questions, such as “How do you feel when...” or “What do you think is...” This enables the staff member to provide detailed, candid answers, rather than be pigeon-holed into responses that may not present the most accurate information.

Coaches should listen actively, reinforce positive behaviors, and ask open-ended questions.
Every coach, regardless of training, experience, or certification, must also be able to create an environment that encourages open communication. Coaches can also take on several forms, so leaders must strategically balance the right persona with the needs of its staff. So once these challenges are sorted out, what are the right ways to coach?

There are many ways to coach, but to get the most effective results, recipients should be paired with mentors whose style is the best possible fit for their personality, goals, and challenges.

Best practice – coaching is fluid and differs based on desired goals.
How do coaches communicate?

Before beginning any type of coaching, all parties should agree on when and how the coach and client will communicate. Will it happen in-person? Via phone? Email? Video chat? A mix of those? Coaching is fluid, and it differs from one case to another, so the right answer is the one that everyone is comfortable with. Staff who work directly with patients may find it difficult to meet with their coach for a longer block of time; email and phone options may be especially critical to this sector of the workforce.

When do you coach?

Real coaching occurs over a long period of time, not in one meeting or a quick email. The process can be set up at scheduled intervals, on an as-needed basis, or even a combination of both. Similar to other aspects of coaching, the right answer is what all parties agree on, and how the desired results will drive the student’s and organization’s goals. What’s important to know is that coaching can, and should, continue after the formal development period ends to reinforce the lessons learned.

Coach with goals in mind

Before starting a coaching relationship, the coach and student should agree on the purpose of their interactions. This not only helps determine what kind of coach persona is the best fit but also how coaching will be implemented. Is the purpose to improve patient care? Leadership abilities? Confidence? All parties need to agree on goals, expectations, timelines, key performance indicators, and more. Recipients need to know what the end looks like before they start the journey.

Coaching can manifest itself in a variety of styles, and the right style is one where the coach, staff member, and organization all agree on what the outcome should be. From when and how coaching should occur, to whether it should be done in-person, electronically, or both, as long as staffers reach their desired goals, then the coaching strategy was effective. Coaching has clear benefits to those who receive it, but it can also have a tremendous impact on a healthcare organization’s ability to achieve provide excellent care while still supporting their staff, their community, and their bottom line.
What are the Bottom Line Benefits of Coaching?

For all the talk about how coaching works and what it means to recipients, what ultimately matters is whether your organization stands to benefit from it. A well-coached staff member may feel more positive than ever about their career future, but there’s only a return on investment if coaching translates into stronger performance, retention, and improved patient care. The good news is that coaching has tangible benefits to both healthcare organizations and all levels of staff.

According to journalist and surgeon, Atul Gawande, as interviewed by Ron Shinkman in “FierceHealthFinance, “each medical error costs an average of $14,000 to correct. Employing a few coaches--essentially performing an interactive and real-time version of peer review--could potentially save a single institution millions of dollars a year.”
Coaching Benefits

How coaching benefits healthcare organizations

Coaching offers a wide range of benefits for any organization working in the healthcare industry. According to journalist and surgeon, Atul Gawande, as interviewed by Ron Shinkman in "FierceHealthFinance, "each medical error costs an average of $14,000 to correct. Employing a few coaches—essentially performing an interactive and real-time version of peer review—could potentially save a single institution millions of dollars a year. While the bottom line savings are obvious, fewer mistakes means a better patient care record, a better reputation, and in essence, improved longevity for the organization as whole.

How coaching benefits healthcare leaders

Coaching is crucial for organizations facing the exodus of Baby Boomer leadership, especially as succession planning in healthcare organizations is still an emerging practice. Virtua, a multi-hospital healthcare system in New Jersey, employed a Best People Review (BPR) to address retention and succession. Every manager who participates in the BPR can take part in six months of coaching. Virtua has seen tremendous gains, including cross-functional projects and improved transparency. The organization achieved "top performance in operating margin in New Jersey in 2008" and in 2009, was ranked number one by HR Solutions International, Inc., for staff engagement.

How coaching benefits the workforce as a whole

While studies are limited regarding the measured benefit of coaching to workers in individual fields, there is tremendous research regarding the benefit to employees in general. With this in mind—employees share goals and aspirations in common, regardless of industry or organization—coaching can and should be offered to anyone who feels they can benefit. In one study, 43% of employees experienced an increase in motivation, 50% enjoyed a stronger working relationship with their team, 47% found a greater ability to see other perspectives, 50% acquired a new skill or improved an existing one, 43% reported an increase in work life clarity, and 43% improved their performance.

50% of workers who receive coaching acquired a new skill or improved an existing one; 43% improved their performance.

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The Writing is on the Wall

Coaching has definitive, measurable benefits to healthcare organizations and its staff, from the ability to provide better services to improving job performance, reducing turnover, and to ensuring organizational longevity.
For healthcare organizations, coaching is all about maximizing the performance and passion of leaders and workers, regardless of whether it’s a superstar looking to reach greater heights, a new hire wanting to start off on the right foot, or even a struggling staff member who needs to improve. Anyone can be a coach, as long as they have certain intangible skills and receive the proper training. The organization, coach, and recipient need to agree on what to improve, how to do it, and how to define success. As long as everyone is on the same page and dedicated to professional development, the end result will always be staff, and a truly patient-centered organization, that reach—or exceed—potential.