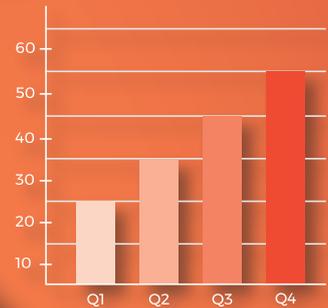


Sri Lankan Hospitality
and Tourism

Professional Business Coaching Course



PARTICIPANT WORKBOOK





Skills for Inclusive Growth

Skills for Inclusive Growth Program is an initiative of the Australian Government in partnership with the Sri Lankan State Ministry of Skills Development, Vocational Education, Research & Innovations. It is implemented by Scope Global.

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FOREWORD

The COVID-19 pandemic has seriously impacted earnings and growth of small businesses the world over. Policy makers and business analysts continue to discuss how best to assist business enterprises to reposition and adapt themselves in light of this global crisis situation and be able to emerge as successful, quality businesses that can also contribute towards our country's prosperity.

Given these conditions, the need for the enhancement of business coaching skills was seen as a necessity in the local micro, small and medium scale business enterprises (MSMEs) sector. In this regard, a business coaching model used worldwide has been re-aligned to our local needs and tested on the ground with diverse communities, especially with a focus on the tourism sector. The local tourism sector has much potential for success, countrywide, including in the regions. Small businesses have the ability to provide world-class services that will attract more high-end tourists and enhance the reputation of the country as a key tourism destination, worldwide. Therefore, this new coaching model, with its customised curriculum to cater to the needs of local enterprises in the tourism sector, is particularly significant as we plan for post-Covid enhancement of tourism activities.

Business Coaching has become widely respected as a service supporting Owner/ Manager development and business performance improvement, globally. The coaching initiative that is proposed within these pages involves one-on-one mentoring through which managers are guided to align business planning with practical work activities that will enhance their businesses in diverse manners. Coaching enables business owners to be successful and uplift performance in ways that are measurable and sustainable.

FCCISL is pleased to announce that a business coaching course is now available for small businesses in the tourism sector in Sri Lanka, with the launch of the Professional Business Coaching Course. FCCISL has contributed towards the development of this Course and will support coaches to access tourism related small businesses to support their growth and development. Business coaches that complete the training requirements will be recognised by FCCISL and be encouraged to deliver services to support business improvement in the hospitality industry. The launch of this course will contribute to upskilling and enhancement of small-scale business owners and employees in the leisure industry, leading to the creation of a business service for those in MSMEs. With the launch of this course, initially we plan to produce twenty coaches in a batch. Subsequently we will up scale this as necessary, with the feedback received and as the industry requirements are further understood.

Selected from key accredited institutes, the course training providers will utilise a training methodology that is largely performance driven and combines a unique model of on-the-job training, quality-enhancement inputs, access to professional development, and mentoring.

Coaching is an opportunity for experienced business operators to undertake training to receive accreditation and be recognised. A business coach will be able to deliver services to business enterprises on a fee-for-service basis. Initially coach training will be offered at a subsidised rate and those who successfully complete the training will be supported to establish links with the small business communities across Sri Lanka.

FCCISL supported and assisted the Skills for Inclusive Growth program in pilot testing the business coaching service with 80 business enterprises in the tourism value chain. The results have been impressive with 89% of businesses reporting improved revenue and performance, 75% of businesses

developing e-marketing channels and operations through this methodology, which has generated new employment in local communities. FCCISL boasts of around thirty thousand members in its fold. I encourage experienced businessmen and women from among them to undergo this training to enhance their skills, leading to better performance and economic prospects.

FCCISL has collaborated with the Australian Government funded Skills for Inclusive Growth program to support this business coaching service in Sri Lanka. It has allowed us to benchmark this Business Coaching model and training course with successful models available in other countries. As we launch this Professional Business Coaching Course for MSMEs, I would like to thank the Australian Government and specifically the Skills for Inclusive Growth project for being with us throughout this process.

We also wish all success to the trainers and trainees who will benefit from this course. We hope that they will join us to upkeep these quality standards as we drive the industry to greater heights in future.

Thank you.

Secretary General/CEO
FCCISL, Colombo 8

Introduction and Background to this Course

Following the successful implementation of a trial program of a Blended Coaching Model in the eastern districts of Sri Lanka (Ampara, Batticaloa, Trincomalee, and Polonnaruwa), for the benefit of micro and small to medium enterprises (MSME's), Skills for Inclusive Growth (S4IG) proposed the development of a coaching course. The coaching methodology demonstrated in the pilot provided tangible business improvements when applied in a guest-house improvement project, a beauty therapy tourism improvement project, for Tuk-Tuk drivers to become tour guides, new tours, and tour guide development initiatives, homestay development, and surf instructor development.

This Professional Business Coaching Course recognises the impact the blended coaching model has and S4IG has consolidated and refined the approach, methodology, and tools such that they can be replicated and used by Industry associations, employer organisations, training providers, and experienced consultants who choose to use this approach to support enterprise improvement and development.

Business coaching can be used to generate improved business performance and inclusive growth across the tourism value chain. Driving enterprise development leads to benefits that lead to sustainable employment outcomes. Coaching also provides opportunities for organisational change, improved business strategy, and planning, by raising the skills and awareness levels of Enterprise Owners/Managers. The coaching journey provides personal development that energises enterprise owners/managers to possess the motivation and confidence needed to improve their enterprises.

Business coaching is relatively new to Sri Lanka, and hence there are many opportunities for experienced business owners and managers, independent consultants, and industry experts to develop their coaching skills and deliver business support services through coaching to the market.

Previously, there was no specific training course that supported business coaching to an accredited standard in Sri Lanka, and hence the development of this Professional Business Coaching Course that educates and provides practical pathways for developing coaching skills. This is a first step to providing avenues for enhanced business support across a range of enterprises.

Welcome Note for Participants

Dear Participant,

This course has been prepared to provide you, the participant, with foundational coaching skills to support the business development of MSME enterprises. We hope that you find the course useful and will be able to deeply develop your coaching practice in your community and with those you work with.

You may be required to attend this training during periods subjected to COVID-19 controls. COVID-19 brings a variety of challenges, and as a participant trainer you will need to confidently direct your trainees to respect COVID-19 guidelines, along with other participants. You will need to have your own health and safety preparations in place and respect Government and WHO requirements and guidelines.

As a coach you have a **duty of care to ensure the health and safety of those who work with you**. You also have a duty to keep up to date with new information and guidelines as they emerge.

Your responsibility starts with this training event. You will be required by your trainer to respect the health and safety of all those joining you in this programme. Please respect others by practising the following COVID-19 rules. As a minimum you need to:

- Maintain a social distance of a minimum 1.5 metres between you and others.
- Wear face masks for the duration of the training.
- Regularly wash your hands and keep good hygiene.
- Use the hand sanitiser, tissues, paper towels, and additional face masks and disposal bins which are available in the training room. Please ask if you need anything.
- Use your own stationery. DO NOT share pens, notebooks, etc.
- Leave your bags and other belongings in the designated safe area.
- Read the poster with the course's health and safety rules.
- Notify your trainer if you feel ill.

Remember that coaching is a skill that evolves with ongoing practice, and that there are lessons for you to learn in every coaching session. Coaching provides opportunities for both your clients' and your own personal and professional growth.

We wish you every success on the Professional Business Coaching Course.

About the Course

This course teaches students how to become business coaches. It combines classroom and theoretical knowledge with practical experience. At the end of the course, students should feel confident in their ability to become a business coach. It equips them with the skills, capability and knowledge to help others succeed.

Business coaching is used to enhance individual and company performance. That is, to take the business from where it is now, to where the client wants it to be. A business coach works with entrepreneurs and business leaders to identify and achieve goals, increase productivity and effectiveness.

On completing this course, you will become a qualified coach. You can further develop your career by becoming a licensed coach.

Licensing provides:

- ▶ Professional recognition for business coaches
- ▶ Networking and support opportunities
- ▶ A way for clients to find a qualified coach

You can become a licensed coach by applying to the appropriate licensing provider.

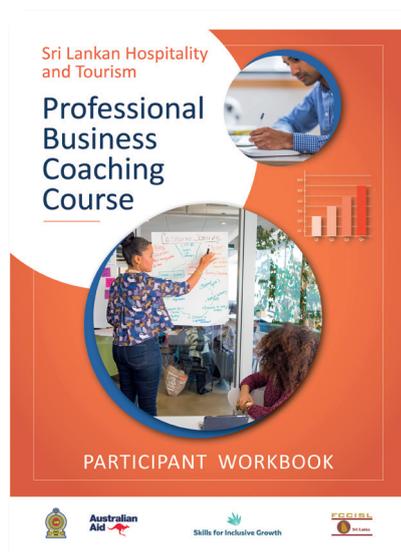
Course Structure

This is a modular course made of 15 Modules that, when delivered together, will provide you, the participant, with foundational business coaching skills and awareness of applying those in an MSME business context. During the course you will be provided with a range of learning resources.

Module	Name	Description	Handbook Reference
Module 1	What is Business Coaching?	Introducing the Course Introduction and overview	Section 1
Module 2	Basics of Business Coaching	Learning the roles and qualities of a coach, resilience and ethics	Section 2
Module 3	The Coaching Model	Introducing the TGROW and the Blended Coaching Models, Measuring Performance	Section 3
Module 4	Managing Change	The business life cycle and helping clients overcome resistance to change in the workplace	Section 4
Module 5	Diversity and Inclusion	Encouraging inclusive practices. Developing awareness of barriers and strategies to overcome resistance.	Section 5
Module 6	Communication Skills	Evaluating communication strengths, weaknesses and barriers. Using question skills and communication techniques for effective coaching.	Section 6
Module 7	Building Successful Relationships	Creating trust and rapport to develop a mutually beneficial coaching relationship and create a coaching contract.	Section 7
Module 8	Key Performance Indicators	Adapting existing and creating new key performance indicators	Section 8
Module 9	Business Coaching in Practice	Recording the coaching process, using KPIs to measure performance, promoting progress through training and exposure visits.	Section 3, Section 8
Module 10	Giving Feedback	Giving and receiving effective feedback, overcoming barriers and bringing the coaching relationship to an end.	Section 10

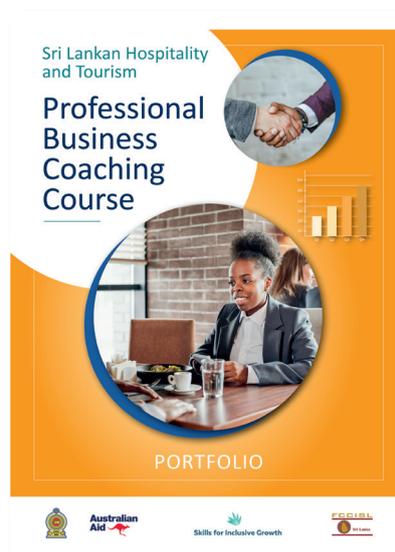
Module 11	Business Leadership Skills	Discovering what leadership is and when to use and adapt different styles. Developing resolute leaders. Effective decision making and motivating others.	Section 9
Module 12	Growth Mindset	Identifying the characteristics of a Growth Mindset vs a Fixed Mindset. Understanding learning and growth. Defining values.	Section 11
Module 13	Advancing as a Business Coach	Identifying and managing conflict while aiming to limit misunderstanding between coach and client. Evaluating coaching progress.	Section 12
Module 14	Developing your Coaching Practice	Establishing and marketing a coaching business. Continuous professional development.	Section 13
Module 15	End of Course Simulation	End of course simulation, assessment and reflection.	Not Applicable

Course Documents - Participant



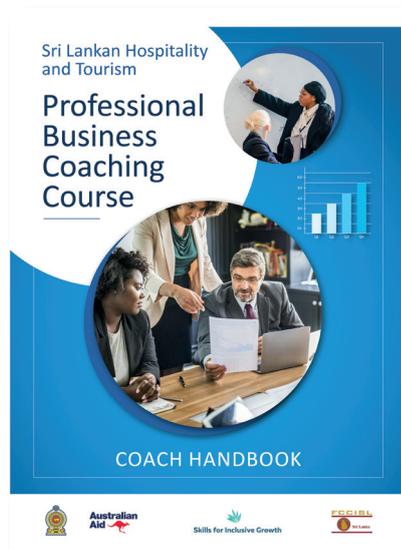
Participant Workbook

Individual workbook for the course



Portfolio

To record progress during the course and practical coaching experience



Coach Handbook

Reference guide to business coaching



Coach Toolkit (Ebook)

Templates and tools for use in business coaching

How to use this Participant Workbook

This Participant Workbook has been designed for your use throughout the Professional Business Coaching Course.

The course is divided into 15 modules, and you will work through them in order. Within each module there are multiple activities for you to complete and your trainer will guide you through these.

The section opener page for each module tells you:

- The time the module will take to complete
- The module aims

There are a diverse range of activities. During the course you will learn through role plays, gap fill exercises, group work, pair work, group discussions, and reflective exercises.

For some activities you will receive handouts from the trainer on which you will do your work. You can keep them in the Portfolio. Otherwise, this Participant Workbook includes space for you to write your answers.

Activities are numbered according to their order in the course. Some activities have sub-activities, others do not.

Participant Materials

This Workbook is accompanied by three other documents are part of the course that your trainer will provide to you:

1. **Participant Workbook** - The workbook that students use to follow the course materials and make their notes as the course progresses.
2. **Portfolio** - a learning log and portfolio for your assignments and to record your practical coaching experience activities.
3. **Coach Handbook** - a reference book to the materials you will learn during the course
4. **Coach Toolkit** - A collection of ready-to-use business and coaching tools that will help you in the structured delivery of business coaching.

Portfolio

This course is accompanied by a Portfolio book in which participants write their learning points and reflect on their experiences of the course.

Use Part 1 during the classroom course:

1. For completing portfolio assignment tasks
2. Recording learning points in the form of self-reflection learning logs

Part 2 after the classroom, during practical experience:

1. Recording practical experience - client / time log
2. Recording the competency checklist
3. Recording self-reflection on coaching practice
4. Collecting pieces of evidence that showcase their coaching skills and progress made.

Assignments

- ◊ Assignments will be distributed for each module. Each of these items will support the overall learning of the participant and contribute to assessment. The participants are required to complete each and every assignment.
- ◊ Participants will keep a record of their assignments in Part 1 of the Portfolio.

Module 10: Giving Feedback

ACTIVITY 01

Providing Effective Feedback

Time: 50 minutes

By the end of this activity you will have considered rules and useful qualities for providing effective feedback and applied these to your own experiences of receiving feedback.



Activity 1a: Basic statements about feedback

Read the statements about feedback in the following table. How much do you agree with each statement? Give each statement a score by ticking one of the five right-hand columns next to each statement.

Then work in pairs. Tell your partner about the score you gave each statement and why. Did your partner give each statement a similar score?

Abbreviations

AC	Association for Coaching
BDS	Business Development Services
BEI	Business and Employment Indicator
CEB	Ceylon Electricity Board
CPD	Continuous Professional Development
EOHFS	Directorate of Environmental Health, Occupational Health & Food Safety
EPID	Epidemiology Unit (MoH)
F&B	Food and Beverage
HPB	Health Promotion Bureau
FCCISL	Federation of Chambers of Commerce and Industry of Sri Lanka
TGROW	Topic, Goal, reality, obstacles, way forward (GROW model)
IAC	International Association of Coaching
ICF	International Coaching Federation
KPI	Key performance indicator
MoH	Ministry of Health
MSME	Micro, small and medium-sized enterprise
NGO	Non-governmental organisation
NVQ	National Vocational Qualification
OPI	Operational Performance Indicators
OTA	Online travel agency
PWD	People with disabilities
PWDA	People with disabilities Australia

SLT	Sri Lanka Telecom
SLTDA	Sri Lanka Tourism Development Authority
SLITHM	Sri Lanka Institute of Tourism and Hotel Management
SMART	Specific, measurable, achievable, realistic, time-bound (SMART Goals)
SWOT	Strengths, weaknesses, opportunities, threats (SWOT Analysis)
S4IG	Skills for Inclusive Growth
TGROW	Topic, goal, reality, obstacles, way forward (TGROW model)
TNA	Training Needs Analysis
WABC	Worldwide Associate of Business Coaches
WHO	World Health Organisation
A	Resources
P	Participant
T	Trainer

Module 1

What is Business Coaching?



6 hours



Module Aims: By the end of this module, you will be able to...

1. Be conversant with the structure of the course generally and prepared for their path of learning through it.
2. Give an overview of what Business Coaching is.

Module 1:

An Introduction to Coaching

ACTIVITY 01

Course Introductions and Expectations

Time: 45 minutes

By the end of this activity you will have identified some basic things that a business coach needs to do with his or her clients, considered which areas you feel more and less confident in, and looked at the general structure of the course.



Activity 1a: Experiences of Business Coaching

Read these accounts by two Sri Lankan business people about working with business coaches. Then discuss in pairs. How did the business coach help them?

Mr Niroshan, Owner, Yuhibuhi Forest Resort, Batticaloa:

“I come from 18 years in the financial industry. I joined the program because I knew I didn’t know enough to run my business. My coach made me look at things differently and understand the processes that needed to be in place that weren’t. He always made time for my questions and even shared a list of suppliers we could buy linen, etc., from because products are very expensive to purchase here in Batticaloa.”



Bird Watching, Tour Activity Group, Batticaloa:

“Our coach has helped us to learn a lot about birds, their migration patterns, information about flora and fauna. We are constantly in touch with our coach for information on our sightings and also with the local university to help us get high-quality images of the birds we see.”

**Activity 1b: What a Business Coach Needs To Do**

Here are some things that a business coach may need to do. Which of these things did the business coach do with Mr Niroshan and which with the Bird Watching Tour Activity Group? Again, discuss in pairs.

- ◊ Identify new opportunities
- ◊ Improve systems
- ◊ Improve performance
- ◊ Solve problems
- ◊ Address skills gaps

Activity 1c: Other Things a Business Coach Needs To Do

Now discuss in small groups. Can you think of other things a business coach may need to do, to help his or her clients?

Activity 1d: A Course Quiz

Stay in your groups. Your trainer will give you some questions about the course. Look through the modules in your course books and find the answers to these as quickly as possible. Each time, which group can answer the question correctly first?

Key points:

- ✦ A business coach can help a client in many ways, for example, by identifying new opportunities, improving systems, improving performance, solving problems, addressing skills gaps, etc.
- ✦ There are some things a business coach needs to do at the outset of a relationship with a client, for example, defining their vision and identifying goals and objectives.
- ✦ There are some things a business coach needs to do with a client involving attitudes, for example, building confidence and self-awareness.

ACTIVITY 02

An Overview of Coaching

Time: 50 minutes

By the end of this activity you will have seen an example of a business coach's impact on a business and identified ways in which a business coach can help a client.

Activity 2a: More on Yuhibuhi Forest Resort

What do you remember about Mr Niroshan and Yuhibuhi Forest Resort in Activity 1?

Now, read this detailed case study about Mr Niroshan and Yuhibuhi Forest Resort. Afterwards, discuss these questions in groups:

1. What were the problems at Yuhibuhi Forest Resort before Mr Niroshan received business coaching?
2. What changes did Mr Niroshan make at Yuhibuhi Forest Resort to improve the resort and improve the experience for visitors and workers there? Give examples.
3. What have been the results of all these changes?



Yuhibuhi Forest Resort in Pullumalai, Batticaloa has undergone a total makeover. Despite offering several outdoor activities such as fishing, hiking and an outdoor swimming pool, the Yuhibuhi Forest Resort lacked many other amenities to attract local and international visitors.

Other drawbacks included a staff cadre that was not diverse and skillful enough to ensure the smooth running of the resort, absence of facilities for the differently-abled, and security fencing of the property.

Following the coaching and training sessions the owner, Mr. Niroshan was convinced that he could apply his newly acquired knowledge and put his skills to good use to improve the resort and work towards transforming the resort to achieve a revised vision.

From setting-up a low-cost changing room by the swimming pool, to categorizing the rooms into homestay, luxury clay house and treehouse, Mr. Niroshan has provided options for his guests to suit different budgets and visitor experiences. He is also installing a waste recycling system and enlarged the kitchen and dining area to ensure better hygiene and food storage practices.

His idea of including a treehouse came from his belief that “every property must have a story to tell,” which has already proved to be very popular with guests.

With a desire to give his guests a great hospitality and wellness experience, Niroshan has also introduced Ayurvedic treatment and massages. And he also facilitates tours and has linked with local activities to provide a range of activities for his guests.

Where earlier the six staff members were all able-bodied, the cadre has been expanded to include four differently-abled employees and a female staff member. The addition of ramps to two of the rooms has helped the resort join the “Disability Tourism” project.

Mr Niroshan has purposefully sought to immerse his business in the local community and ensure this is reflected in his services and the profile of his staff. Inspired by the transformation of this business, other hoteliers and resort owners in the area are following suit. They have noticed that Yuhibuhi is now sought after by both international and domestic visitors even though the property is located in a remote area of the Batticaloa district.

Yuhibuhi has certainly come a long way from a resort that offered basic amenities with low occupancy rates to one that boasts a variety of activities and leads similar enterprises in setting the standards.

Activity 2b: Types of Changes

Look at the examples you gave for question 2 of Activity 2a. Which of these changes relate to:

- Developing new products?
- Improving systems?
- Solving problems?
- Catering for diversity?
- Increasing confidence and self-awareness?

Activity 2c: Presenting the Benefits of Business Coaching

In the same groups, prepare a short presentation you could give to potential new clients explaining the benefits of business coaching. For ideas, look at the passage about Mr Niroshan and Yuhibuhi Forest Resort in Activity 2a. Don't make the presentation too long. It should only last for two or three minutes!

Activity 2d: Giving Your Presentations

Now, one person from each group should go to another group and deliver his or her group's presentation to the new group.

Afterwards, the group should give the presenter feedback. Were they convinced about the benefits of business coaching?

Key points:

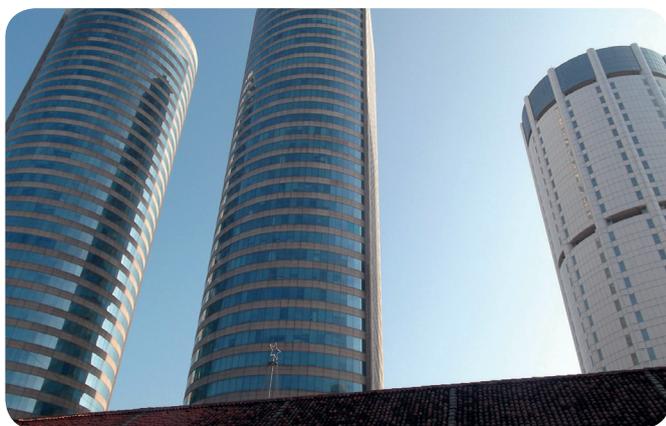
- ✦ In the case study, you saw examples of how a business coach could help a client's business by developing new products, for example, new forms of accommodation and guest services and activities.
- ✦ You also saw how a business coach could help by improving existing systems, for the benefit of both customers and staff.
- ✦ Obviously, an important part of a business coach's role is solving problems.
- ✦ If possible, a business coach should also help a client to cater for diversity.
- ✦ Again, a business coach needs to work on a client's attitudes, for example, by increasing their confidence and self-awareness.

ACTIVITY 03

Why Sri Lanka Needs Business Coaching

Time: 45 minutes

By the end of this activity you will be able to explain the importance of business coaching in the context of Sri Lanka economic development.



Activity 3a: A Sri Lankan Quiz

Read these statements and questions about Sri Lanka's tourist and general economy. Each time, what do you think is the correct answer? Then discuss your ideas with a partner.

1. The Sri Lanka tourism sector saw its peak in 2018. How many tourists arrived in the country during that year?
 - a. 0.87 million
 - b. 1.56 million
 - c. 2.33 million

2. Visitors come to Sri Lanka from many countries. In 2018, which three countries did the biggest number of visitors come from?
- a. India, China and the UK
 - b. Russia, India and China
 - c. Russia, India and Germany
3. In Sri Lanka in 2018, how many people depended directly on tourism?
- a. Just over 400,000
 - b. Just under 2 million
 - c. Around 5 million
4. What type of economy is Sri Lanka's economy becoming?
- a. A heavy-industry one, dominated by manufacturing
 - b. A manufacturing and services-orientated one
 - c. A rural, crops-based one
5. Which of these things are challenges for Sri Lanka's tourism and general economies?
- a. Generally, to have enough skilled labour
 - b. In tourism, to attract more 'high-yielding visitors', i.e. visitors who spend more
 - c. In tourism, to focus more on quality
 - d. All of the above

Activity 3b: Check Your Answers

Your trainer will give you a handout with an article about Sri Lanka's tourism and general economies. Read it and check your answers to Activity 3a with your partner. Were you correct?

Activity 3c: A Client's Needs

Now with your partner, discuss these needs from the last part of the article. If you were a business coach, and your client worked in tourism, which of these needs would you say was most important for your client? Which was second most important? Third? Least? Give each need a rating from 1 (most important) to 4 (least important) and explain why you chose the ratings.

Being conscious of their customers' (i.e. tourists') needs	
Being respectful of their employees	
Being protective of their natural environment	
Being efficient with their resources	

Activity 3d: Other Possible Needs

Now work in groups. Activity 3c gave you four areas where Sri Lankan businesspeople, especially ones working in tourism, might need help from business coaches. What other areas may they need help in? Brainstorm and make a list of areas. At the end of this activity share your ideas with the trainer and the class.

Key points:

- ✦ The article used in this activity underlines the importance of Sri Lanka's tourism industry, which in 2018 directly employed 404,000 people. However, about five million Sri Lankans had some sort of involvement in it.
- ✦ The article identified a number of needs for business people (and business coaches) operating in the tourism industry: being conscious of customers' needs, being respectful of employees, being protective of the natural environment and being efficient with resources.

ACTIVITY 04

What is a Business Coach?

Time: 45 minutes

By the end of this activity you will be able to articulate who business coaches are, what they do, who they work with and what their objectives are.



Activity 4a: Job Descriptions

Work in pairs. Match these jobs with the correct job descriptions.

1. A trainer...
 2. A counsellor...
 3. A consultant...
 4. A mentor...
-
- a. ...heals pain and stops conflict in an individual or a relationship.
 - b. ...gives general advice and knowledge to someone, based on his or her own experience.
 - c. ...runs a training session or training course. This usually has set objectives and a set syllabus.
 - d. ...is an expert in one area. He or she is hired by a company to identify problems and recommend solutions in that area.

Activity 4b: Business Coaches – True or False?

Remain in your pairs. Complete the True / False list about a business coach.

Statement	TRUE	FALSE
A business coach always needs to collaborate with his or her client.		
A business coach uses a set, linear 'learning path' with his or her client.		
A business coach is focused on problems that happened in the client's past.		
A business coach is focused on creating change in the client's future.		
A business coach assumes that clients are not able to identify and generate their own solutions to problems.		
A business coach focuses on specific tasks or objectives.		

Activity 4c: Questions About Business Coaches

Work in three groups – A, B and C. Discuss the following questions:

- ✦ A – Who do business coaches work with? What do business coaches want to increase? How do they increase these things?
- ✦ B – Usually, who are business coaches? What do they do to help their clients?
- ✦ C – What should business coaches not do for clients? Do business coaches need to be experts in their clients' businesses or industries?

Activity 4d: Check Your Answers and Report Back

Now, the trainer will give each group a handout. Read the passage on your handout and find the answers given to the question that you discussed in Activity 4c. Do you agree with what the passage says?

Afterwards, report back to the trainer and the rest of the class about the questions you discussed and the answers you found in your passage.

Key points:

- ✦ There are overlaps between the role of a coach and those of a trainer, counsellor, consultant and mentor, but there are important differences too.
- ✦ Business coaches want to make their clients more productive, profitable and effective, using both direct and indirect strategies.
- ✦ An effective business coach is usually a professional with some business expertise, but he or she doesn't have to be an expert in the client's particular industry or business niche.
- ✦ Being a business coach isn't about making decisions for the client or solving problems for him or her. It's about working alongside the client, helping him or her to identify goals, implement appropriate strategies, solve problems, overcome challenges and increase his or her self-awareness. At the end of the day, these are things the client, not the business coach, has to be able to do.

ACTIVITY 05

Why Become a Business Coach?

Time: 45 minutes

By the end of this activity you will have considered your own reasons for becoming a business coach and evaluated the qualities that successful business coaches commonly have.



Activity 5a: Complete the Statements

Work with a partner. Read the statements in the following table. What do you think the missing words are?

a.	I have reached a stage in my (1) _____ where I want to share my (2) _____ with less-advanced business operators.	
b.	I simply want to help other (3) _____.	
c.	I want to work in an (4) _____ and (5) _____ field.	
d.	I want to become self-(6) _____.	
e.	I want to help Sri Lanka develop its (7) _____.	
f.		
g.		

Now your trainer will write up seven words for spaces 1-7. Discuss them with your partner and make sure you put each word in the correct space in the statements.

Activity 5b: Assess Your Reasons for Becoming a Business Coach

Individually, fill in the right-hand column of the table in Activity 5a. Next to each statement, write a score of 0-3. Think about why you want to become a business coach and follow this scale:

- ✦ Write 0 if the statement doesn't apply to you at all.
- ✦ Write 1 if the statement applies to you a little bit.
- ✦ Write 2 if the statement applies to you to some extent.
- ✦ Write 3 if the statement applies to you completely.

If you have other reasons, write them in rows f and g of the table and give them a similar score of 1-3.

Then in groups, using your scores, tell your fellow participants about your reasons for becoming a business coach.

Activity 5c: Qualities of Business Coaches

The following are qualities that have commonly been identified in successful business coaches. Often, such coaches:

- ✦ Enjoy helping others to succeed
- ✦ Consider themselves a 'people person'
- ✦ Have a mind for business
- ✦ Have extensive experience supporting business growth and development
- ✦ Have good computer and digital literacy skills
- ✦ Have a broad range of business knowledge
- ✦ Are excellent communicators
- ✦ Are comfortable giving feedback and holding clients accountable.

Your trainer will assign your group one of the following case studies. Each person would like to start or grow a business in the tourism field. Discuss each person's situation. Which of the above qualities would be most important for a business coach who works with the person? Also, are there any other qualities, not in the above list, that might be useful?

A. Maria

Maria is a housewife. She loves cooking and in her district is seen as an 'expert' in Sri Lankan cuisine. Now that her children have grown up and are at college or in work, she is thinking about starting a business where she offers cooking lessons in local food to foreign tourists. However, she has little experience of business and no experience of dealing with foreigners.



B. Malaka

Malaka grew up in a coastal resort and became skilled at kitesurfing when he was young. He worked as an instructor for a company giving kitesurfing lessons to foreign tourists. Now he would like to set up his own kitesurfing school. While he is very confident with foreign tourists and has a lot of foreign friends on social media, he admits he has no idea about business!

C. Asela

Asela has worked for different tour companies as a guide, especially with tourists who want to spend one or more days trekking in Sri Lanka's mountains. He has noticed that many tourists are interested in seeing birds and other wildlife during the treks. He would love to set up his own business, offering trekking and walking trips that allow customers to see nature. He is knowledgeable about wildlife and plants and, having been in different companies, reckons he has a 'good head' for business. However, he wonders about marketing. How can he let potential customers in other countries know about his business?



Afterwards, each group should share their ideas with the rest of the class.

Key points:

- ✦ Qualities that have been commonly identified in business coaches include: enjoying helping others to succeed, considering themselves a 'people person', having a mind for business, having extensive experience supporting business growth and development, having good computer and digital literacy skills, having a broad range of business knowledge, being excellent communicators and being comfortable giving feedback and holding clients accountable.
- ✦ Obviously, different clients will require business coaches to show different qualities.

ACTIVITY 06

The Benefits of Coaching

Time: 45 minutes

By the end of this activity you will be able to identify and explain a number of reasons why a client should work with a business coach.



Activity 6a: Terms for Running a Business

Work in pairs. Discuss the following terms, which all relate to running a business and to business coaching. Can you explain what each term means?

- ◆ Build self-confidence
- ◆ Nurture staff
- ◆ Take risks
- ◆ Delegate
- ◆ Network
- ◆ Build an action plan

Activity 6b: Matching Headings and Descriptions

Again, work in pairs. The headings 1-9 are reasons why a client should take on a business coach. Match the headings with the descriptions a-i below.

1. THINKING IN NEW WAYS	
2. BUILD SELF-CONFIDENCE	
3. NURTURE STAFF	
4. ASSESS WHICH RISKS TO TAKE	
5. ADDITIONAL SUPPORT	
6. ACTION PLAN	
7. GET HONEST OPINIONS	
8. NETWORKING	
9. WHEN TO DELEGATE	

- a. Employees or colleagues may be subjective in their attitudes and advice, not objective. However, a good business coach will assess business practices objectively.
- b. Confidence is not an innate characteristic and can be learned. To facilitate this, business coaching will help identify the clients' skills, strengths and abilities.
- c. A coach can connect clients with others in the same industry. A coach can help them establish an association so that they are better able to represent their interests at the local and national levels.
- d. Employee retention and productivity are key factors to business success. A coach can identify skill gaps and generate demand-driven training for employees. A coach can also make sure these skills are put into practice in the workplace.
- e. A coach with their general tourism knowledge can help clients learn how to assess risks in this marketplace.
- f. Sometimes business owners do business the way they always have because it is easy, not because it is best for the business. A coach will ask the right questions and encourage clients to see their business practices in a new way.
- g. A coach helps clients identify which aspects of their role require the most focus, and which aspects can be given to employees to do.
- h. A coach can, collaboratively, create a plan that lists short term priorities within the key business improvement of product and service, marketing and operations.
- i. A coach can identify non-skills-related business constraints and facilitate solutions. For example - business registration, bank loans, micro-funding and access to market.

Activity 6c: Reasons to Work With a Business Coach

These business people are the ones whose case studies we looked at in Activity 5c. Their businesses are now operating. Read what Maria, Malaka and Asela say about their situations just now. Which of the reasons in Activity 6b, 1-9, would you suggest as reasons for them to work with a business coach?

A. Maria (offering Sri Lankan cooking lessons)

“Well, to my surprise, I got my business going and a number of foreign tourists have come to me for Sri Lankan cooking lessons. I have made some money, which I’m happy about. But I feel that for the effort I’m making, I should be earning **more** money than I do. I also get frustrated sometimes because I always seem to be doing the same thing with my customers, giving exactly the same lessons, over and over again. It gets boring! Finally, I don’t know of anyone else who runs a business like mine. It would be good to meet someone who did so that we could exchange ideas.”

B. Malaka (running a kitesurfing school)

“I now have a large staff of instructors. It’s tiring to manage them all. On top of that, I have to do everything else – planning, marketing, purchasing, accounts. I’m exhausted all the time. I never thought this would be so much work! While my school makes money, I feel annoyed when I see other watersports schools getting more customers than we do. I know we have better instructors and offer a better service. So how do those other schools attract more custom than we do?”

C. Asela (offering nature and wildlife-focused walks and treks)

“My business is small but we get enough customers to make a little profit. The customers are very enthusiastic – I never knew foreigners would be so interested in Sri Lanka’s nature and wildlife! However, a few of them have complained about the guides I employ. The guides are knowledgeable about wildlife, but often the customers expect them to know even more and ask them scientific questions that they can’t answer. I sometimes wonder if my business could appeal to local, Sri Lankan tourists too? The number of foreign customers dropped after the 2019 bombing and the COVID-19 pandemic, so I wish I could also attract domestic customers. Surely a few Sri Lankans must be interested in their own country’s wildlife?”

Key points:

- ✦ People have various reasons for becoming business coaches, motivated both by personal factors and by a desire to share their skills and help the community.
- ✦ There are many possible benefits for a client who starts working with a business coach, for example: being encouraged to think in new ways, having their self-confidence increased, learning how to nurture staff, learning how to assess risks, learning when to delegate, learning how to network, getting honest opinions, developing an action plan and generally receiving additional support.
- ✦ As a business coach, you will need to ‘sell’ these benefits to potential clients.

ACTIVITY 07

The Coaching Model

Time: 45 minutes

By the end of this activity, you will have been introduced to the basic steps in the Blending Coach Model and the TGROW Model.



Activity 7a: Two More Case Studies

Your trainer will divide you into two halves and give out copies of case studies. The people in the case studies have businesses and want to work with a business coach.

One half should read the case study about Suresh's business. The other half should read the case study about Chameera's business. While you read, think about these two questions:

- ▶ How clear is Suresh or Chameera about what he wants his business coach to do? What evidence is there that he is clear or not clear?
- ▶ As a business coach, what things would you do if you started working with Suresh or Chameera?

Then work in a pair with somebody who has read the **same** case study as you. Discuss your answers with your partner.

Now the trainer will pair you off with somebody who read a **different** case study. Tell your new partner about your case study. Also, tell him or her your answers to the above two questions – how clear the person in the case study seems to be about the role of his business coach, and what things you would do if you started working with him.

Activity 7b: The Stages of the Blended Coaching Model

The Blended Coaching Model is a business coaching approach to take with a client like Suresh, where the business coach needs to work out what stage his business is at and gradually work with him towards creating an action plan, setting goals, etc.

Work in groups. The trainer will give each group a set of cut-ups containing the three basic stages of the Blended Coaching Model. Read the stages, discuss them in your groups and decide what is the most logical order for them.

Which stage would you do with Suresh first? Second? Third?

Activity 7c: The Stages of the TGROW Model

Imagine now you have to work with Chameera, who seems to have a much clearer idea of his business situation and goals. The TGROW Model is a more focussed business coaching approach to take with a client like him.

Work in new groups. Again, the trainer will give each group a set of cut-ups containing the five basic stages of the TGROW Model. Again, read the stages, discuss them in your groups and decide what is the most logical order for them.

Which stage would you do with Chameera? First? Second? Third? Fourth? Fifth?

Key points:

- ✦ Some clients will have clear ideas about their business needs. Others will be less clear. Therefore, you may need to use different approaches with different clients.
- ✦ The Blended Coaching Model is a basic approach that consists of a performance evaluation, followed by an action and skills plan, and then by regular coaching sessions.
- ✦ The TGROW Model is a more focused approach whose five stages are termed as follows: Topic, Goals, Reality, Options and Obstacles, and the Way Forward.

ACTIVITY 08

The Portfolio and Learning Log

Time: 40 minutes

By the end of this activity you will know what to write in your course portfolio and learning log and will have reflected on your experiences of the course so far.



Activity 8a: What Do You Use the Course Portfolio For?

All participants need to keep a course portfolio. You will write different things in the portfolio at different times.

Work with a partner. Which of these things need to be done in the portfolio now, during the course? Which of them need to be done in it later, after the course? Complete the table with the four options given.

- ◊ Recording practical experience
- ◊ Writing assignments
- ◊ Doing homework
- ◊ Recording learning points

Contents of the Portfolio	
Now	1. _____ 2. _____
Later	1. _____ 2. _____

Activity 8b: What Do You Use a Learning Log For?

Learning logs have been described as diaries kept by participants during training and academic courses. The course participants use learning logs to record their reflections about what they are learning and about how they are learning it. On this course, you are expected to keep a learning log too.

Work in pairs and discuss the following items. For a learning log to be helpful and effective, which of these things should you write in it?

- a. Key factual information from your training sessions.
- b. A strategy you found helpful for doing your coursework.
- c. 'To do' lists, i.e. things you need to do next on the course.
- d. Your thoughts on being a business coach.
- e. An incident that occurred during the training sessions, which you want to think about.
- f. Your homework.

Can you think of other things to record in a learning log?

Activity 8c: Examples of Learning-Log Entries

Remain in pairs. Read the following three learning-log entries written by participants on a training course for business coaches. Each time, consider:

What is the participant doing with the entry (e.g. asking a question, identifying a learning strategy, making a connection)?

How is recording this useful for the participant's learning and reflection?

Entry A

Today we did a roleplay activity about giving feedback. As the coach, I identified something that I thought was obviously a problem in the client's performance. However, the client seemed hurt and upset when I said this. From this, I have learned that even if you identify an obvious problem, you need to speak diplomatically. Otherwise, it can be mistaken for criticism

Entry B

24/5/2020, 8.00 pm – Tomorrow we have a training session about building rapport with clients. I think I have a fairly friendly and sociable personality, so I should be good at this.

25/5/2020, 6.00 pm – When we did one of the rapport-building activities today, I found it really difficult to make small talk! Maybe I find it easy to be friendly and sociable with people I already know well. However, I need to work on my techniques for building rapport with people who I am meeting for the first time.

Entry C

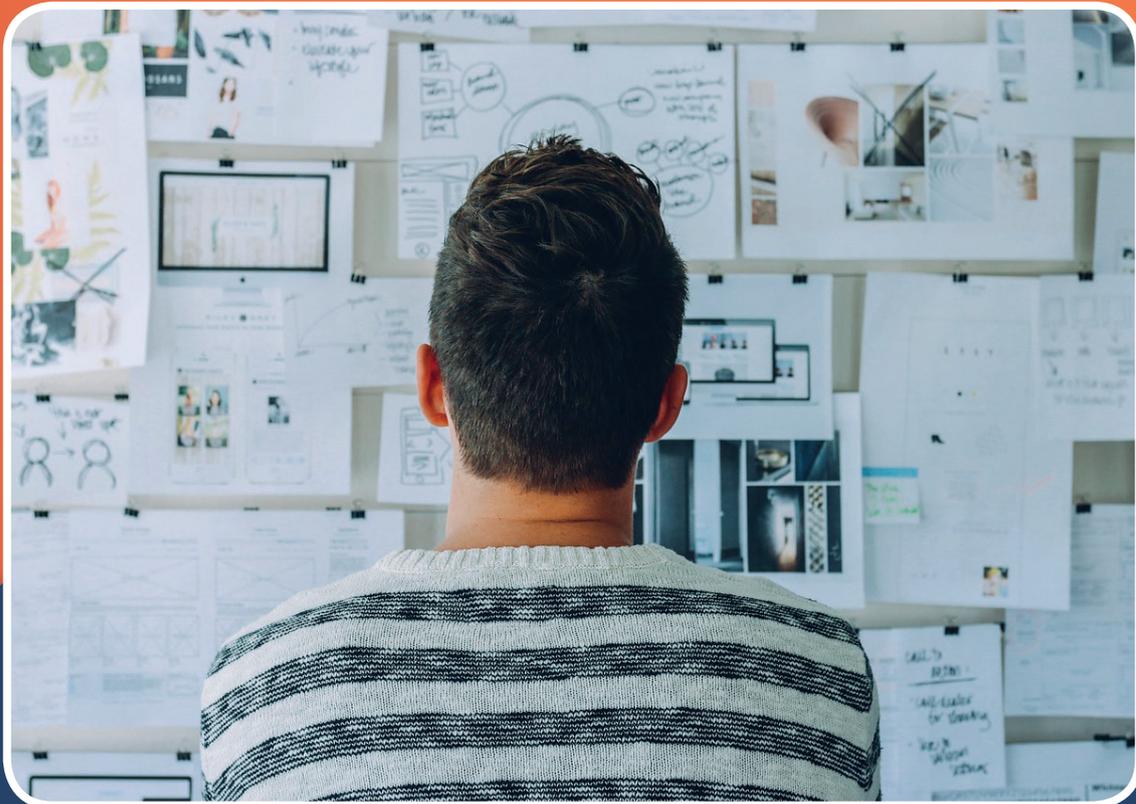
In training today one of my classmates said sometimes you just need to pretend to be confident. I don't really agree. If you're not sure about something, can't you admit it to the client without losing face? And what happens if you pretend to be confident in front of the client and then say or do something that's clearly wrong? What will the client think of you then?

Module 2

Basics of Business Coaching



5 hours 05 minutes



Module Aims: By the end of this module, you will be able to...

1. Follow the coaching journey together with your clients.
2. Take on a variety of coaching roles during the journey.
3. Use the personal qualities that will help you perform these roles.
4. Help build your clients' resilience and gain insights.
5. Follow ethical standards and maintain confidentiality as they take the coaching journey with your clients.

Module 2:

Basics of Business Coaching

ACTIVITY 01

The Coaching Journey

Time: 45 minutes

By the end of this activity you will be able to follow and explain the coaching journey to your clients.

Put the steps of the coaching journey in order.

	Look for Options
	Negotiate, and Sign a Coaching Contract
	Final Evaluation
	Set the Tone
	Assess the client's current situation
	Follow Up and Review
	Prepare and Plan
	Ascertain desired goals
	Lay the Foundation
	Set SMART goals
	Agree on the terms of operation, set boundaries, responsibilities, times of meetings, action points, number of goals etc.
	Evaluate the advantages and disadvantages of the number of options available.
	Find out from the client what they hope to get from this coaching and where they would like to be at the end of the coaching.
	This is a wrap-up session at the end of the coaching to review what the client gained from their coaching and to set them up for life 'post-coaching'.
	Plan for your coaching process and research your client and their business sector.

	Work with the client to set SMART goals with clear action points. Set realistic actions with achievable time frames for them.
	You may need to use different business analytical tools to ascertain the situation to determine where the client is now.
	Meet the client to review action points. If they haven't been achieved, support the client to reach them or revise action points.
	During your first meeting, get to know your client, create good rapport and win your client's trust.
	Explain your credentials, how the process of coaching works, and the roles of coach and client.

ACTIVITY 02

The Coaching Journey

Time: 50 minutes

By the end of this activity you will be able to adopt a variety of coaching roles. 'Variety of coaching role's' means the different ways you can help your clients.

Activity 2a: The Roles of a Coach

Here is a list of 12 of the many roles of a coach.

- a) To build a relationship with your client
- b) To share your knowledge and experience
- c) To help your client feel more confident
- d) To help your client grow the business
- e) To help your client find their own solutions
- f) To help your client break goals into tasks and deadlines
- g) To help your client be resilient in the face of setbacks
- h) To help your client gain insight
- i) To help set goals
- j) To give honest feedback
- k) To help your client make decisions
- l) To help your client find out what needs to be improved

In your groups go through the list, make sure you know what each role means, underline any you are not sure about.

Activity 2b: Inside-out and Outside-in



Can you work out what is the difference between **Inside-out** coaching and **Outside-In** coaching?

Look at the diagrams representing two kinds of coaching and the ten sentences below. If you can tick **Inside-out** or **Outside-in** next to the ten sentences.

	Inside-out	Outside-in
Asking the client about their plans		
Giving the client clear instructions		
Giving practical information		
Helping the client to act on existing knowledge or experience		
Finding out what went wrong and why		
Asking probing questions		
Helping the client find their own solutions to problems		
Showing the client how to do something technical		
Telling the client about your experience		
Asking your client about their training needs		

Activity 2c: When to Use Outside-in

Coaching uses Inside-out more than Outside-in; but there are times when your Outside-in is needed.

In your teams, for each of the four Outside-In sentences in the list above, can you give examples of when they may be good to use?

For example: can you imagine a situation when it might be better to give clear instructions?

Activity 2c: When to Use Outside-in

In your teams, you are going to look at three client case studies and decide which three roles from the list in Activity 2a are most relevant for coaching each of these clients.

You have met these clients already – they are Maria, Asela and Malaka. But you will find there is some more information about them.

You have 12 roles and three clients: try not to have the same role for more than one client!

There are no right answers!

Key points:

- ✦ The coach can decide when Inside-out is the best role (most of the time) and when Outside-in is more effective.
- ✦ The Inside-out approach is based on the belief that a person can succeed if the things holding them back are removed.
- ✦ The Outside-in approach can be used when the coach is an expert who can effectively communicate experiences that the client wants to know about and can act on.

ACTIVITY 03

Qualities of an Effective Coach

Time: 45 minutes

By the end of this activity you will know which of your personal qualities will help you be an effective coach.

Activity 3a: Personality Quiz

Individually complete the quiz below.

Grade the statements 1 to 3, where 1 = completely disagree and 3 = strongly agree

When you have finished, work with a partner and tell each other what you have scored for the statements and explain why. Give examples.

For example, "Whenever I criticise someone, I always give a compliment first so they will listen to the criticism."

The Statements

- a) Whenever you criticise someone, you try not to hurt their feelings _____
- b) You find it easy to keep calm when things take a long time _____
- c) You are usually able to bring people round to your point of view _____
- d) If there is a problem at work, you are good at thinking of interesting solutions _____
- e) You can understand other people's point of view even if you disagree _____
- f) You can change your habits and routines when necessary _____
- g) You are never late for appointments _____
- h) If you have a disappointment you can usually bounce back before long _____
- i) You often see causes of problems and possible solutions that others don't see _____



Activity 3b: Matching the Qualities

Which qualities below match the statements (a to i) above? Write one of the qualities next to each statement.

Persuasive

Creative

Able to empathise

Trustworthy

Tactful

Tolerant

Encouraging

Resilient

Patient

Creative thinkers

Enthusiastic

Compassionate

Good listeners

Great communicators

Insightful

Reliable

Flexible

Focused on goals

Supportive

Genuine

Activity 3c: Case Studies

Working with a partner, consider these problem situations that a coach might face. Which qualities would help?

Situation 1

The coach travels all the way from Colombo to meet a client but the client says that he is too busy for coaching.

Situation 2

Your client is very anxious about his restaurant business. A new restaurant has opened with better food and service. He has no idea what to do.

Situation 3

You are a female coach meeting a new client but you feel that he doesn't think a woman can help him.

Key points:

- ✦ An essential quality of an effective coach is a 'positive mindset'.
- ✦ A coach with a positive mindset believes that everyone can grow and change and succeed.
- ✦ These coaches can unlock their clients potential – help them do things they didn't know they could do and discover new possibilities.

ACTIVITY 04**Coach's Role: Building Resilience****Time: 60 minutes**

By the end of this activity you will be able to help your clients increase their resilience in the face of setbacks.

**Activity 4a: The Language of Resilience**

In your groups decide what these words mean. Put a question mark against any you are not sure of.

Resilience

Disappointments

Failures

Challenges

Self-belief

Optimism

Self-confidence

Positive

Self-management

Reframing

Future minded

Activity 4b: The Reframing Game

Reframing: We see challenges, failures and mistakes as opportunities to learn.

Your trainer will tell you how to play this game.

Activity 4c: So How Resilient Are You?

Rate yourself from 1 to 5 (1 = strongly disagree; 5 = strongly agree) for each statement:

Statement	Score
I'm usually optimistic. I see disappointments, challenges or failures as temporary and expect to overcome them.	
When I get angry or upset because of disappointment, challenges or failures, I soon get over it.	
I can still feel self-confident when things are very uncertain.	
I adapt quickly to new developments. I can cope with change.	
I'm playful. I can have a laugh even in difficult situations. I can laugh at myself.	
I learn valuable lessons from my experiences and from the experiences of others.	
I'm good at solving problems. I'm good at making things work well.	
I'm strong and long-lasting. I hold up well during tough times.	
I am always learning from my own and other people's disappointments, challenges and failures.	

Convert your scores with the following key:

Less than 10: Low Resilience

You find it difficult to bounce back from difficult situations and get very upset if you are criticised. When things don't go well, you may feel helpless and lose hope. You should get help to improve your resiliency skills.

10-29: Some Resilience

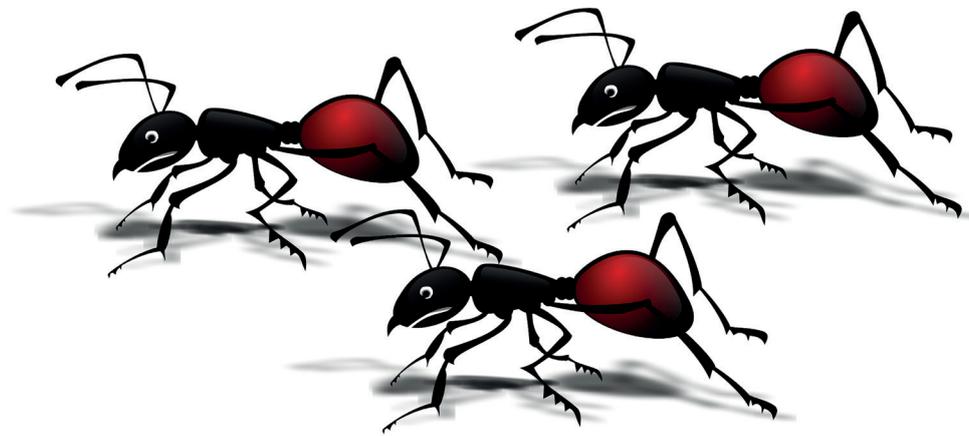
You have some good resiliency skills but can improve a lot. Try to improve the skills you already have and develop more. You may also want to get some coaching or help from others.

30-34: Adequate Resilience

You are a strong learner who can bounce back from most challenges. You can learn more about how to be resilient and enjoy life more when things get difficult.

35-45: Highly Resilient

You bounce back well from life's problems and enjoy life even in difficult times. You could help others who are trying to be more resilient.



Activity 4d: A.N.T.S. and the BBC

It is natural to get ANTS - **Automatic Negative Thoughts** - when we experience failure, disappointment or serious problems. But resilient people **Bounce Back Confidently** – BBC!

- a) In your team, imagine a serious disappointment or setback a client may tell you about with their hotel business. What happened?

Write it here _____

b) Now imagine your client's ANTs when this has happened.

Discuss what those thoughts might be and how they would show lack of the qualities of resilience below, (eg what would they say to themselves that would show lack of self-confidence?)

You do not need to write anything. Just discuss it with your team.

Resilience quality	Client's ANT
Self-confidence	"I.....
Optimism	
Positive attitude	
Self-managing	
Re-framing	
Future minded	

Three-Step Process

Follow the three-step process to move your client from ANTS to BBC.

Step One: find out from the client what ANTS she is having

Step Two: challenge those ANTS sensitively

Step Three: agree the way forward - what the client will do to overcome the set-back.

c) You have just done step one. Now discuss what you as the coach would say to the client in Step Two.

d) Then move on to Step Three: what do you suggest the client could do going forward to get over the setback.

Key points:

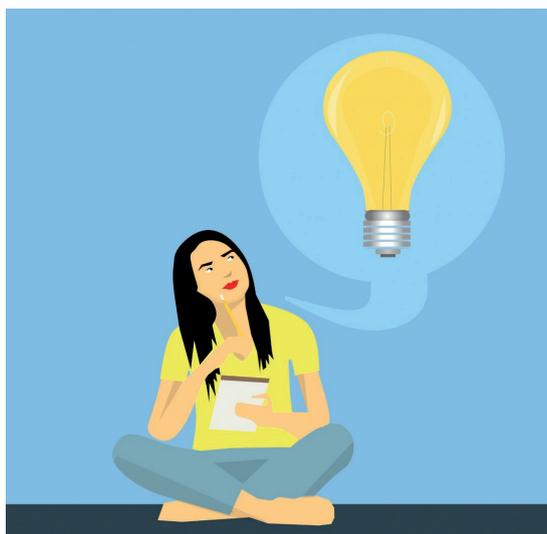
- ✦ A good definition of resilience is the ability to bounce back.
- ✦ Some people are naturally more resilient – more bouncy - than others.
- ✦ Resiliency can be developed – as can be seen by the fact that the older we get the more resilient most of us become!

ACTIVITY 05

Coach's Role: Helping Insight

Time: 60 minutes

By the end of this activity, you will be able to help your clients find their own solutions to problems.



Activity 5a: Action Learning

Your trainer is going to tell you about a technique called Action Learning.

Activity 5b: Practicing Action Learning

One of your group – the ‘problem-owner’ - will describe a real difficult work-related problem you are facing now.

The others will ask the ‘right questions’ to help the problem-owner gain ‘insight’ – a new way of looking at the causes of the problem, and finding a new solution to try.

You must **not suggest solutions** – not “Have you tried this....?” Or “Why don’t you do that...?”

One member of the group will be the ‘facilitator’ – to help the group do this Action Learning activity.

Facilitator's Instructions:

- ✦ Invite someone to tell the group about their difficult problem.
- ✦ Do not take part in the questioning.
- ✦ Write down any questions you think might be a ‘right question’ (i.e. help the problem-owner think ‘outside the box’.)
- ✦ Stop anyone who makes suggestions – say loudly **NO SUGGESTIONS!**

Key points:

- ✦ A great coach can ask the 'right' questions and help clients see 'outside the box' – so they see things from a new viewpoint, which helps to solve problems.
- ✦ Or see the 'bigger picture'; the bigger picture is like seeing the problem from above - to have a wider view of the issues involved – not only the details. Again, clients may gain a different perspective to help solve a problem.

ACTIVITY 06

A Code of Ethics

Time: 45 minutes

By the end of this activity you will understand the standards of professional ethics expected of you as coaches.

Coaches deal with much sensitive and personal information. Although there may not be a formal written code of ethics for you to follow, you are expected to maintain your own high standards of truth and honesty.

Activity 6a: Internationally Accepted Principles of Coaching

Your trainer will give you slips of paper with the descriptions of 8 Ethical Principles from the International Association of Coaching (IAC).

On the walls of the room, you will see the titles of those principles on flip charts.

Your group's task is to stick to the right principles under the right titles.

You have 10 minutes to do this.

The group with the most principles under the right titles will be the winning team.

Ready – Steady – GO!

Activity 6b: Ethical Principles in Practice

In groups, look at the situations below. What is the most ethical thing for the coach to do?

1. When you go to meet a new client you realize their main competitor is someone with a successful business you know a lot about.
2. Your client advertises that their hotel is registered with the Sri Lanka Tourism Development Authority (SLTDA) – but it isn't.
3. Your client pays touts to catch tourists: they tell the tourists that the hotel they have booked is closed.
4. Your client is making his staff, who all come from very poor families, work very long hours with no days off and for very low wages. This is how s/he makes a small profit from his hotel.

Activity 6c: Confidentiality

Confidentiality means that professionals don't give information about anyone or their business to anyone else unless that person has said they can.

Confidentiality is based on trust.

- ✦ The client must feel sure the coach will respect their confidentiality.
- ✦ The coach needs the client to share information about their business.
- ✦ The client's decision whether to share or not is final.

From your experience, can you predict any things that coaches might want to know that clients might not want to share?

Key points:

- ✦ Confidentiality between the coach and client is a cornerstone of any coaching relationship. Unless the client trusts the coach and is willing to be completely honest with them, it will be difficult for the coach to accurately understand a) their client's business situation and b) the challenges they face.
- ✦ The client must trust that information they give to the coach will go no further. They must also feel that they are in a safe and non-judgmental environment where they can share information and concerns honestly.

Module 3

The Coaching Model

 6 hours



Module Aims: By the end of this module, you will be able to...

- 1 Explain the importance of collecting customer feedback. You will have practised presenting results from raw data.
2. Measure performance using Operational Performance Indicators and Business and Employment Indicators. You will understand the importance of sound financial tracking and will have had initial practice in designing Key Performance Indicators.
3. Explain the TGROW Model of coaching.
4. Write SMART objectives.
5. Explain the Blended Coaching Model of coaching.

Module 3:

The Coaching Model

ACTIVITY 01

Introduction to Measuring Performance

Time: 40 minutes

By the end of this activity, participants will have considered basic concepts of financial tracking and different areas where it might be useful to measure performance.



Activity 1a: Financial Tracking

Read this case study about Ruwan.

Ruwan is a three-wheeler driver in Trincomalee, and a member of his local tuk-tuk association. He bought his three-wheeler two years ago, through a finance company, and has a monthly payment of LKR15,000, LKR3,000 of which is interest on the loan.

He has local business in the early morning school run and then office rush hour, and again when schools come out, and at 5pm when the offices are empty. Most of the morning, and in the early evening until about 9pm, his customers are tourists. He takes them where they want to go and waits if asked. He generally has lunch in town and also stops for tea and a cigarette two or three times a day.

At the end of the day, he counts how much money he has in his pocket and writes it in a notebook. He also records the money spent on petrol. The notebook tells him he's making decent money, but he never seems to actually have it in his pocket or bank account at the end of the month, or when he needs to pay for a service or maintenance.

Question 2

There are many areas where it can be useful to measure performance over time. Look at the following short case studies and decide what business area is being measured. The first has been done as an example. Your trainer will give you some ideas for other business areas. Also, you may need to use the same business area twice.

	Case study	Business area
e.g.	A restaurant measures the cost of all ingredients and the amount of income from sales of food.	Finance
1	There are many hotels in your area, with different ones opening and closing. You measure your ranking on booking.com	
2	You have a large shop, with many souvenirs for sale. You measure how many you sell of each item.	
3	You have a school with six teachers, and you measure the number of class hours that are taught. This gives you the average number of hours taught by a single teacher.	
4	You give customers a satisfaction questionnaire. One question asks how easy it was to make a booking, on a scale of 1-10.	

Key points:

- ✦ Good financial management and record-keeping are important for any business. A poor or incomplete picture of finances can hide problems you really should be addressing. Also, if you don't have good financial tracking, you don't really know if you are making a profit or not.
- ✦ There are many areas where it can be useful to measure performance over time.

ACTIVITY 02

Types of Key Performance Indicators

Time: 1 hour 20 minutes

By the end of this activity you will have been introduced to a set of tools to measure business performance and a business' progress towards goals.



Activity 2a: Introduction to Key Performance Indicators

Key Performance Indicators (KPIs) are various measuring tools that will help you and your client to identify areas in need of development and to start working out how to go about addressing them. These vary from business to business, but all businesses have them, to measure their performance and understand the crucial question: Is performance improving or not?

You have already done some work with KPIs, for example, with the different business areas where you can measure performance in Activity 1b, even if you were not yet familiar with the term.

Under the umbrella of KPIs we can find Operational Performance Indicators (OPIs) and Business and Employment Indicators (BEIs). These were developed as sets of KPIs for different businesses, micro, small and medium, in the hospitality and tourism industries. They can be used with the Blended Coaching Model, which we will look at later in this Module.

Here are some indicators for hotels and guesthouses. Areas under Operational Performance Indicators (OPIs), and Business and Employment Indicators (BEIs) include:

Operational Performance Indicators	Business and Employment Indicators
a. Site and Building	e. Business
b. Marketing	f. Employment
c. Operations	
d. Food and Services	

Look at this list of OPIs and BEIs. Which area do you think they belong to? Mark each one a-f. The first one has been done as an example:

1	Brochure, business cards, photos / video, guest book, product description, professional certificate	b
2	Quality standards – bathroom; water, toilet and shower, size and comfort	
3	Average room occupancy ratio for last quarter; %	
4	Advertising and web performance; national websites, Trip Advisor, own website, Facebook Pro, Google Map, National Geographic provincial website, social media, trade shows, guides	
5	Facilities are accessible for persons with disabilities; the site, buildings, room and bathroom are accessible for person in a wheelchair	
6	Number of workwomen with skills certificate; TVEC approved certificates	
7	Accounting system; income book, expenses book, receipts and invoices, monthly profit, accuracy of data	
8	Kitchen facilities and hygiene; Stove, fridge and freezer, organization, hygiene and cleanliness	

Now, work in pairs and compare and check your answers.

Activity 2b: Using Operational Performance Indicators and Business and Employment Indicators Without Any Change

Work individually. Read and answer the questions in Question 1.

Question 1

Some Business and Employment Indicators **require simple yes or no answers**. For example:

BEI4 Business Bank Account Yes / No

Other BEIs need a number, for example:

BEI6 Number of Workmen ___ (e.g. 2, 3, 4...)

1. Would you expect the first one, about the bank account, to change from one visit to another?
2. Would you expect the second one, about workmen, to change over time, and would this be good or bad?

Now, read the information in Question 2 and work through the questions in pairs.

Question 2

Operational Performance Indicators are areas to evaluate in areas such as site, product, marketing and operations, as we saw earlier. They are then ranked from 0 to 5, with 5 being the best ranking.

0 = not applicable 1 = basic 2 = progressive 3 = standard 4 = good 5 = very good

Read this descriptor of OPI 1 for a guesthouse and the rankings.

OPI 1- Site / construction appearance (access, entrance, garden, location, parking, view, building design and material used, any kind of places of interest); using locally available materials (coir, cadjan, clay); concept development.	
1	Far from everything, poor design, not much activity around, minimal view, poor location.
2	Okay view, moderate distance to everything, average appearance, average location, parking, landscaping, access to entrance.
3	Good location, good view, water access, local material design, site optimized.
4	Very good location, quality material, amazing view from the accommodation, site optimized, ample parking, easy access, beautifully landscaped. Started to develop a concept.
5	Using local materials such as cadjan, coir, clay. Having a proper environmentally focused indigenous concept / theme.

1. Your client is a hotel. Who decides on the ranking, you, the client, or the two of you together?
2. If you decide on ranking 2, do you think it would be possible to reach ranking 3, given that the location cannot be changed?
3. Do all establishments need to aim for a ranking of 5?

Activity 2c: Adapting Operational Performance Indicators and Business and Employment Indicators

Sometimes, you may want to use the OPIs or BEIs already created but adapt them so that they are more appropriate for your client's business. Moving away from hotels, look at this OPI for water-based activities. Then work in pairs and discuss the following questions.

Canoes and kayaks: inflatable or made out of a solid material and should be made according to international specifications.	
0	Unaccepted models which are of very low quality
1	Unaccepted Models or poor or low quality.
2	Accepted models. 2-3 kayaks and canoes.
3	Accepted models. 5-10 kayaks and canoes.
4	Accepted models. 10+ kayaks and canoes.
5	Meet International Quality Standards and are stored according to manufacturer's requirements.

1. If your client's business includes snorkeling and diving trips, but has no canoes or kayaks, how should you deal with this OPI?
2. Your client has three canoes or kayaks, which meet international standards and are stored correctly. How should you deal with this OPI?
3. Your client's main business is snorkeling trips. She also has one kayak. It's a little old but acceptable. How should you deal with this OPI?
4. Your client has a large operation with 15 kayaks, and the potential to expand to 25 to provide a service to a nearby five-star hotel. The kayaks are new but stored on the ground under plastic sheeting. How should you deal with this OPI?

Activity 2d: Creating New Key Performance Indicators

It may be necessary for some clients to design new KPIs. We will look at this in more detail in a future module.

For now, look at these scenarios. In what business aspect, or area of work, may you need to make a KPI? You will do the first one together with the trainer. Then discuss the others in groups. Be as specific as possible in your answers.

1 - A medium-sized hotel in an area of many attractions has a reasonable number of guests, but they never stay long. Most stay a single night. That's the client's impression, at least.

KPI:

2 - A collective of boat owners do whale safaris. Most trip advisor comments are very positive, but a number have complaints. It is the impression of the manager that one or two of the owners are responsible for most of the negative comments. How can he find out?

KPI:

3. A low lying tea estate in Uva conducts tea tours and sells goods from the estate and valley in its shop. The manager is not certain which items are more profitable, and which should perhaps be discontinued.

KPI:

Key points:

- ✦ Key Performance Indicators (KPIs) can concern product, operations, processes, employment, or any other aspect of a business.
- ✦ Skills for Inclusive Growth (S4IG) has divided KPIs into Business and Employment Indicators (BEIs), which as their name suggests cover the aspects of business and employment and require yes / no answers or numbers; and Operational Performance Indicators (OPIs), which cover the aspects of site and building, marketing, operations and food and services and are evaluated using a ranking of 0-5. They are both a type of KPI.
- ✦ What is 'key', what is important to the success of the business? What can help the business develop and / or head off threats? If you choose key areas carefully, working to improve performance will boost your client's business.

ACTIVITY 03**TGROW – Focus on Topic and Goals****Time: 40 minutes**

By the end of this activity you will know the benefits of including a topic stage and have learnt how to focus on the coaching goals, using SMART objectives to define those goals.

**Activity 3a: Introduction to TGROW**

Earlier in Module 1, you looked at the TGROW model for business coaching. Work in pairs. Can you remember what 'TGROW' stands for? What are its five stages?

- ✦ T... _____
- ✦ G... _____
- ✦ R... _____
- ✦ O... _____
- ✦ W... _____

Activity 3b: Benefits of a Topic Stage

Topic takes place at the start of the coaching conversation and enables the coach to understand the 'context' of the issue and the wider environment the business is operating in. This, naturally, means the tourism and hospitality sector, but also maybe wider social and economic factors. Understanding this (and understanding the client's views) facilitates a greater level of comprehension around the client's goals and why they are important to them / their business.

Still in pairs, discuss – which three of the following eight are not benefits of including a Topic stage?

- A. Greater understanding of the business context and wider environment the client / business operates in
- B. The coach comes to understand the client's competitors
- C. Increased clarity of the scale of the business / any problems
- D. Greater understanding of the client's long-term goals
- E. Opportunity to identify issues different from those the client initially intended to raise
- F. Opportunity for coach to demonstrate his / her expertise
- G. Creates a strong foundation on which to set relevant goals
- H. It is a chance for the client to forget his / her problems for a while

Activity 3c: Questions for a Topic Stage

Individually, make a list of four questions you may ask in the Topic stage:

- 1.
- 2.
- 3.
- 4.

Now compare your list with that of your partner from Activity 3a and 3b.

Activity 3d: SMART Goals

Your goal is where you want to get to. You may have a long-term goal, and some shorter-term goals as stepping stones to reach it. To help you focus on and achieve your goals, they should be expressed as SMART goals:

- ◊ S _____
- ◊ M _____
- ◊ A _____
- ◊ R _____
- ◊ T _____

Activity 3e: Identifying Problems with Goals

Maanika has a bakery in Ampara, which was established by her late husband. It is next to a large office block, and so does well at breakfast time. The bakery is successful and employs three part-time workers. It opens at 6am, closes at 11am, and reopens 4pm until 8pm. There is very little business before 8.30am, and very little after 6pm. She has two children, but they have both left home.

Maanika has time on her hands and money in the bank. She has worked with a friend who is another successful businesswoman and written the following objectives. They are reasonably SMART, but each one is lacking in a certain respect. What is the problem with each one?

1. I will open a second bakery in another town by the end of this year. I will identify suitable premises and sign a one-year lease by the end of November. I will recruit two staff by the end of October, and train them in Ampara.
2. I will buy a glass-fronted display cabinet by the end of June and start to sell cosmetic products to my female customers. I will source the products from Pettah by going in a van every three months to replenish stock.
3. I will introduce 12 more types of baked goods next year, at the rate of one every month.
4. Due to the increase in the price of fish, I will experiment with the recipe for fish buns during September, asking customers for feedback and recording it against different recipes. The aim is to make fish buns more profitable.

Key points:

- ◊ Topic takes place at the start of the coaching conversation and enables the coach to understand the 'context' of the issue and the wider environment the business is operating in.
- ◊ The goal is where the client wants to get to. They may have a long-term goal, and some shorter-term goals as stepping stones to reach it. To help clients focus on and achieve their goals, these should be expressed as SMART goals.

ACTIVITY 04**TGROW – Focus on Reality****Time: 1 hour 15 minutes**

By the end of this activity you will have a set of questions and an analytical tool to help you establish the current state of a business and be able to advise a client on collecting and analysing customer feedback.

**Activity 4a: Asking Questions to Understand Current Reality**

Reality refers to the departure point, where your client's business is now. This is important because to map the route to the goal, you really need to be sure of the starting point. To understand the current reality, you need to observe and invite your client to assess the current situation. You will need to listen a lot and encourage openness. Therefore, don't be threatening or judgmental. Also, you will probably need to ask encouraging questions to get an honest and detailed picture.

Make a list of four questions you may ask in the reality stage:

- 1.
- 2.
- 3.
- 4.

Now compare your list with a partner's.

Activity 4b: Understanding Different Question Types

Businesses in tourism and hospitality are, clearly, customer focused. So one important way of understanding the current reality is to ask the customers questions and listen to their answers. It is also extremely useful to read reviews on Trip Advisor or Google, for example, to pick up ideas which you may want to investigate further in a survey. If two or three people mention a problem or say they hoped for an additional service, a survey can then see how widely that view is held, and whether you should do something!

There are many different kinds of questions. You will look at these in detail in the communications module. For now, match the question types in column A with the example questions in Column B.

A. Question Type	B. Example question	+/-
Open-ended	I am from Europe / Asia / Australasia / The Americas / Africa	
Nominal	Would you use us again in the future?	
Likert Scale	What could we do to improve our service?	
Rating Scale	How would you rate our cleanliness on a scale of 1-5? Very clean 1 2 3 4 5 Very dirty	
Yes / No	The food was tasty: Strongly Agree / Agree / Neither Agree nor Disagree / Disagree / Strongly Disagree	

Of course, each question type has advantages and disadvantages. Look at the following five statements. Which refers to which question type? Fill in the +/- column with the letters A-E.

- These questions can shine a light on areas you hadn't realised you needed to improve or show you customer needs that you hadn't considered. But they usually have fewer people answering because they take more time and thought and they can be difficult to analyse. Therefore, they can be a good starting point before you use a different question type to get a larger sample.
- These questions could not be more straightforward! They are very useful at the beginning of a survey, to encourage customers to start it. The drawback is that they don't give very much information, only a simple segmentation into two groups.
- These questions are easy to answer, and suitable when there is a limited number of possible responses. It is easy to use them to make charts or graphs showing trends. However, they only work if you have included all possible categories of responses or allowed for the customer to tick 'other' and write an answer.

- D. This is a 5 or 7-point scale that evaluates customers' level of agreement with a statement. They can be great for monitoring satisfaction over an area you want to improve, but they are not good at picking up new problems or unknown opportunities.
- E. These questions are often used to rate products. Think of booking.com, for example, or film reviews on Rotten Tomatoes. It gives a numerical value to your survey and is therefore easy to track over time. They are not good at picking up new problems or unknown opportunities.

After each matching activity, check your answers with a partner.

Activity 4c: Analysing Responses to a Customer Survey Question

Look at the responses collected over three months from this question:

The bedroom and bathroom were at a good level of cleanliness

Strongly Agree - Agree - Neither Agree nor Disagree - Disagree - Strongly Disagree

August	September	October
Strongly Agree - 2	Strongly Agree - 1	Strongly Agree - 0
Agree - 6	Agree - 5	Agree - 5
Neither A nor D - 4	Neither A nor D - 5	Neither A nor D - 4
Disagree - 1	Disagree - 3	Disagree - 4
Strongly Disagree - 0	Strongly Disagree - 1	Strongly Disagree - 1

In groups, discuss how you could present this information to analyse the trend in customers' views of cleanliness.

Activity 4d: SWOT Analysis

We are now going to look at a famous tool to analyse reality. It looks at the current reality and also at the near future, what could be reality very soon. It is called a SWOT analysis.

Question 1

You have probably heard of a SWOT analysis.

- What does each letter stand for?
- Which two of those are concerned with factors **internal** to the business, and which two are to do with **external** factors?

Question 2

Your trainer will read out a list of factors. Some of them are considered internal and, as such, you should have control over them. Some of them are considered external and, as such, you probably don't have control over them.

As you listen to the list, write them down in the correct column below:

Internal factors	External factors

Afterwards, check your answers in pairs.

Question 3

You are now going to do a SWOT analysis for Gajnan and Lakshana's homestay business, which is introduced in the box below.

Gajnan and Lakshana run a homestay business near Ampara. Gajnan works as a mechanic, so it is his wife, Lakshana, who does most of the business, with help from a neighbour if needed. They have built three cabanas in their garden for visitors. This has taken up about 50% of the garden. Each cabana has a veranda in front, where meals are served. There is no common space for guests to meet, and no information about activities, though Gajnan has binoculars he is happy to lend. There are national parks and bird sanctuaries, and some interesting old temples in their area, plenty to occupy a few days for the unhurried visitor. The garden also attracts many birds and has a small stream running through it, though sometimes there are a lot of mosquitos, especially around Cabana two, overlooking the stream. The stream may not be there for much longer, though, because there is talk of a big dam being built upstream.

There are big hotels in the area, and a few guesthouses, but these are mostly concrete boxes, whereas Gajnan and Lakshana's house, and the cabanas, use more local materials in their construction.

Work in groups. Using the information in the case study, complete the analysis below with Strengths, Weaknesses, Opportunities and Threats

Strengths	Weaknesses
Opportunities	Threats

Key points:

- ✦ It is important to probe the current reality with a client and not simply accept what he or she thinks are areas to work on, to increase opportunities or to solve problems. By asking good questions, you can come to a mutual understanding, and that is a good springboard for planning your actions.
- ✦ A SWOT analysis can help you identify opportunities and threats, as well as existing strengths and weaknesses, and guide you to the important areas to work on.

Activity 5a: Questions for Obstacles and Options

Now we know where we are currently (reality), and where we want to go (goal). We have to consider various ways to get from A to B. It is just like planning a journey. Is it better to go on the main road or the backroads? Are there roadworks? Are schools ending causing traffic jams?

Work in pairs. Look at the box below. There are two sets of questions. One is concerned with options and one with obstacles. Which is which? Also, add two further questions to each list.

_____	_____
<ul style="list-style-type: none"> › What is standing in your way? › Is there anything you need to stop doing or do differently? › What if this or that constraint were removed? Would that change things? › What personal changes do you think you need to make to achieve this goal? › What is preventing you from making necessary changes? › Do any of your skills / attitudes / behaviours / etc. contribute to this situation? Or do those of other people? › › 	<ul style="list-style-type: none"> › What alternatives are there to the current approach? › What suggestions do you have? › What do you need to start doing in order to achieve this goal? › Who might be able to help you? › What are the advantages and disadvantages of each alternative? › What factors or considerations will you use to weigh the options and choose? › Do you have a preferred option that you would like to act on? Why? › ›

Activity 5b: Designing your own SMART Goals

At this stage, your client should have developed a good idea of how they can achieve their goal. It's time to agree to specific actions that will move them towards their goal and to dates to review progress. This is important to provide accountability and allow for opportunities to change the approach if this original plan is not successful.

Look at the following case study. With your partner, break the projected development of the café down into stages and decide on suitable goals and suitable review dates for each stage. Express the goals as SMART ones. The review dates should be expressed in the length of time from now, for example, two weeks, two months, etc. Write the goals and dates in the table below. You won't necessarily need to use all four rows.

Talib, your client, has a business on one of the surfing beaches near Arugam Bay. He rents out surfboards and gives surfing lessons, and he also has sunbeds to rent and a cafe. As well as rice and curry, he serves pizza. The problem is that there are several places serving rice and curry, and two or three others with pizza. Frankly, their pizzas are better.

Talib has told you that there are more and more Russian tourists these days. Russians were rare a couple of years ago, but it's clearly a fast-growing market. Talib has no idea what Russians eat at home. You have mentioned Russian salad and borscht, the two Russian dishes you know of. You have done a quick google search with Talib and found that the ingredients for the salad seem straightforward, and beetroot seems to be the main ingredient in borscht. It is available all-year-round. Talib wants to change his menu to target the Russians.

	SMART objective	Review date
SMART Goal 1		
SMART Goal 2		

SMART Goal 3		
SMART Goal 4		

Key points:

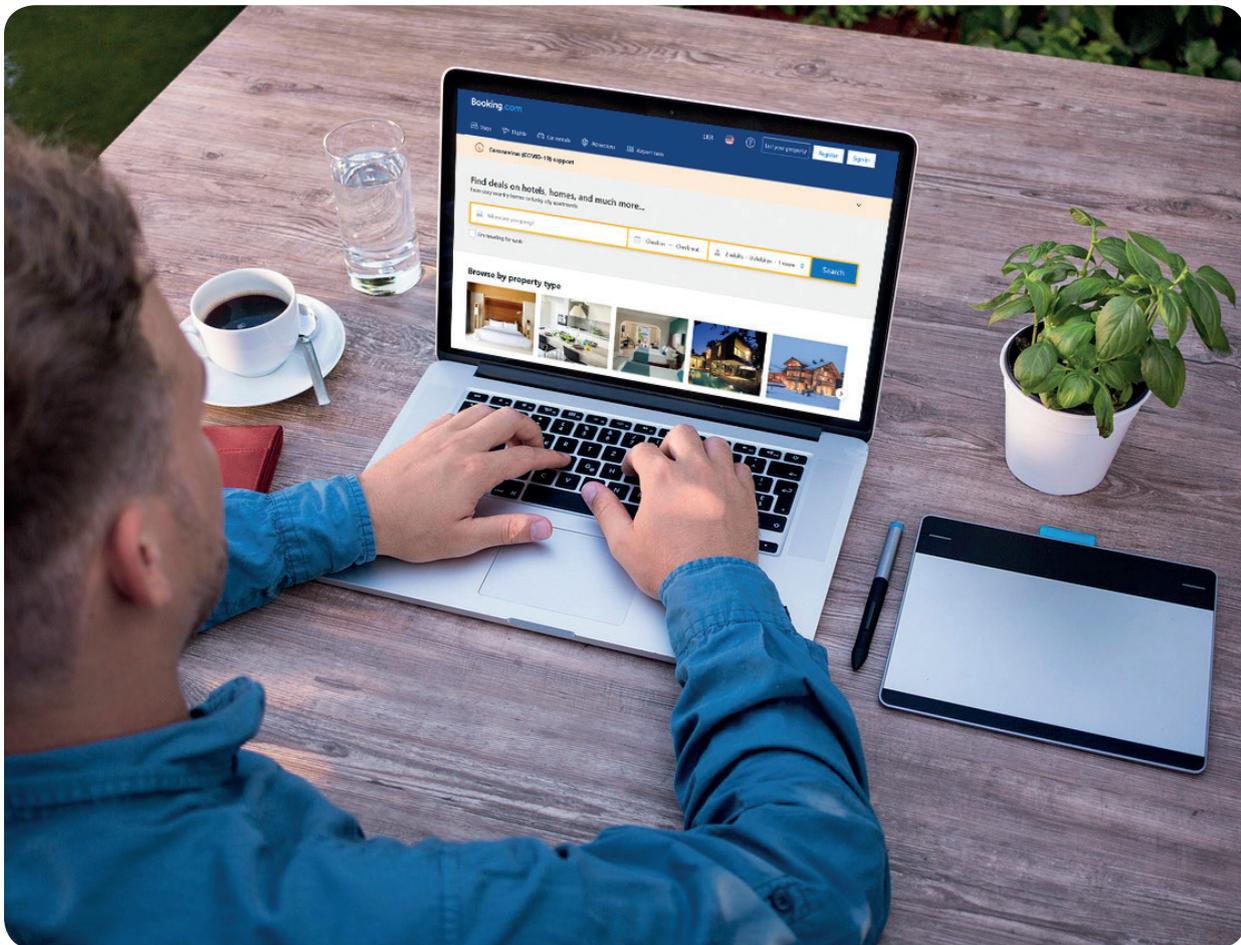
- ✦ TGROW is a useful framework, but it is not in itself a solution. It is a starting point to help you and your client improve the business.
- ✦ Starting with a topic helps set the scene.
- ✦ Goals are where you want to get. If they are SMART, then you can say for sure when / if they are reached.
- ✦ To understand current reality you need to ask a lot of questions, honestly but sympathetically, and ask customers as well as clients.
- ✦ You need to ask questions to understand options and obstacles, too. Don't just go with the first idea you have; examine it thoroughly.
- ✦ The way forward will involve actions. Express them in SMART terms, because it is far easier to then keep to them and know when they have been finalised.

ACTIVITY 06

Blended Coaching Model – Introduction and Understanding Your Client’s Business

Time: 40 minutes

By the end of this activity, you will be familiar with the stages of the Blended Coaching Model and will have considered what sort of information needs to be collected to understand the client’s business in the model’s first stage.



Activity 6a: The Stages of the Blended Coaching Model

This table shows the order of and information about the three different stages of the Blended Coaching Model. However, the main activities for each stage have been removed from the table's middle column.

Work in pairs. Discuss the list of activities that follows the table. Can you put the activities in their correct places in the middle column?

Stage	What happens at this stage	Additional details of this stage
1	A	<p>Here, business coaches assist clients to:</p> <ul style="list-style-type: none"> ✦ Identify which stage of development the organisation is at currently ✦ Understand challenges, including gaps in skills and processes that hinder growth ✦ Identify key improvement areas ✦ Collaboratively adopt goals
2	B.	This will be used to monitor performance
	C.	This will help to achieve specified desired results.
3	D.	<p>These help clients achieve their goals. They take place in regular coaching sessions and include:</p> <ul style="list-style-type: none"> ✦ KPI tracking, performance monitoring and evaluation ✦ Identification of gaps and skills needs
	E.	<ul style="list-style-type: none"> ✦ Supporting the client to access other business development services ✦ Creation of value add and expanded business services ✦ Updates to the action plan as actions are achieved or revisions are required

- ✦ Agree goals and measurement tools
- ✦ Give ongoing feedback
- ✦ Conduct operational performance evaluation to understand the client's business
- ✦ Create an action plan
- ✦ Carry out ongoing performance monitoring

Activity 6c: Researching Basic Information

Note that the Basic Information Form you have been given is only Part One of the form. There is another section, Part Two. This section is for the coach to research, mostly online. It focuses on publicly available information about the business. This means that in the case of a startup, there may be no information to fill in. However, for operational businesses, this is the coach's first chance to find out how the business is perceived.

Work in pairs. Here are the beginnings of the three questions that guide the coach's research on Part Two of the Basic Information Form. What do you think are the full questions? Remember that in this section the coach is mostly researching about the business **online**.

1. Does the business have...? _____
2. Does the business have...? _____
3. Is there any...? _____

Check your ideas with the trainer.

These findings should be shared with the client as early as possible in the coaching relationship and can be adjusted as a result.

Key points:

- ✦ The Blended Coaching Model does not require the client to have a clear goal in mind when coaching starts.
- ✦ The model begins with an evaluation of the current business performance. This is used to help the client understand their business challenges and identify key improvement areas. Use the two-part Basic Information Form and the Baseline Profile Form to facilitate this stage.
- ✦ The second stage involves the coach and client agreeing on goals and measurement tools that will be used to monitor performance. From these, they create an action plan to achieve specified desired results and agree KPIs that will be tracked.
- ✦ The third stage involves the coach doing ongoing performance monitoring and giving feedback to help clients achieve their goals. This takes place in regular coaching sessions.

ACTIVITY 07

Creating an Action Plan and Using Business Development Services

Time: 45 minutes

By the end of this activity, you will have considered the components of an action plan for the Blended Coaching Model's second stage and what Business Development Services can be utilised during its third stage.



Activity 7a: What Do You Need to Put in an Action Plan?

After you have evaluated and understood your client's business in the first stage of the Blended Coaching Model, you can start the second stage, where you and your client develop an action plan.

Discuss in pairs. What things does the action plan need to outline? Think of some suggestions.

Activity 7b: Parts of an Action Plan

Now your trainer will give you a handout containing the Action and Skills Development Plan. Note that some words are missing from the form's headings. What do you think are the missing words?

Work with your partner from Activity 7a. Complete the form with words from this list:

- ✦ Management
- ✦ Date completed
- ✦ Systems
- ✦ Sustainability
- ✦ Objective
- ✦ KPIs
- ✦ Inputs
- ✦ Date set

Activity 7c: Which Business Development Services Can You Use?

Once the action plan has been agreed, you can proceed to the third stage, where you carry out ongoing performance monitoring and give ongoing feedback to help your client achieve his or her goals. This takes place in regular coaching sessions.

During later modules in this course, you will become familiar with and get practice in the many elements that make up this stage – KPI tracking, performance monitoring and evaluation, giving feedback, etc. Just now, however, we will look at one element of this stage, supporting the client to access **other Business Development Services** (BDSs).

Business coaching is one of many BDSs. In the Blended Coaching Model, coaches can introduce other services to the client if necessary.

Other BDS include:

1. Training
2. Counselling
3. Mentoring
4. Consultancy
5. Exposure visit
6. Collective purchasing
7. Participation in exhibitions / conferences
8. Networking
9. Brokering
10. Social media / online activities
11. Referrals

Work in groups and discuss the following examples of clients. In each case, which of the above BDS might you refer the client to, to help them solve the problem?

Example 1

During the coaching process for a guesthouse, it becomes apparent that the client has a skills gap in food hygiene.

Example 2

During coaching, Chandima, a tour guide, decides that she would like to develop her product to offer bird watching tours. She has basic knowledge of birds from her garden but finds them difficult to identify in flight.

Example 3

During the coaching process for a small hotel, the client is keen to improve their product by using more natural materials. Nearby is a villa that has been built using locally sourced materials including palmyra. The villa’s sustainability forms a valuable part of their marketing.

Activity 7d: Some Final Questions about the Blended Coaching Model

Remain in your groups. Quickly discuss these questions about the Blended Coaching Model.

1. There are different forms that are used at different stages of the Blended Coaching Model.

- Basic Information Form
- Baseline Profile Form
- Action and Skills Development Plan
- KPI Tracking Form
- Coaching Activity Report

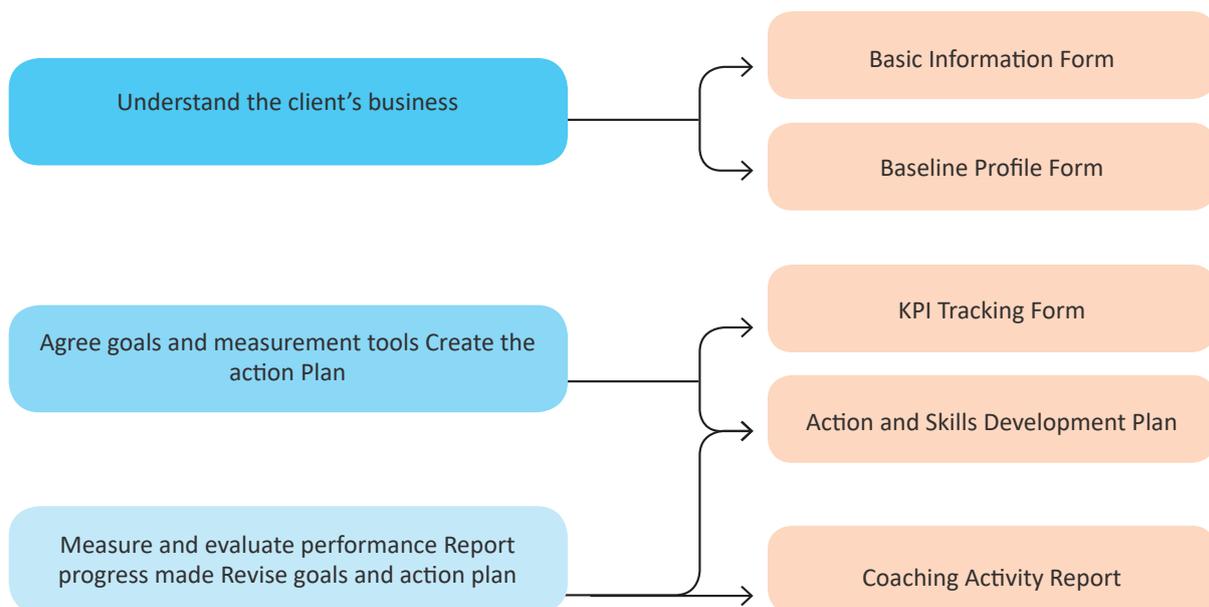


Diagram 04 - 7d: The Blended Coaching Model Forms

2. Do you have to follow these forms 'religiously', or can they be changed and adapted to suit your client's business, situation and needs?

3. When designing an action plan...

- a. Is the completed plan **static**? Or does it **change** sometimes?
- b. Is it wise to include in the plan all the possible actions that can be done to develop and improve the business?
- c. If the plan can't include everything at once, what things should be **prioritised** in it first of all?

4. As the Blended Coaching Model has developed, which two of the Business Development Services listed in Activity 7c do you think business coaches have found to be most useful for their clients?

Key points:

- ✦ The second stage of the Blended Coaching Model involves the coach and client developing an action plan. It should outline what needs to be done, by when, and what needs to be provided in order to achieve the goal. S4IG provides a form for this, the Action and Skills Development Plan.
- ✦ The action plan is not static but is a live document that should be updated and adapted as the client and their business evolve. To avoid intimidating the client, don't list all the possible actions in the plan immediately. Additional actions can be added as the coaching continues. Start with the priorities that are most effective and require only low investment. These priorities should be visible from the data collected in the Baseline Profile Form.
- ✦ Remember that all the forms provided for the Blended Coaching Model can be changed to suit your client's business, situation and needs. Flexibility is important in coaching, so feel free to adapt these forms to your client's requirements.
- ✦ Business Coaching is one of many Business Development Services (BDSs). In the third stage of the Blended Coaching Model, coaches can introduce other services to clients if necessary. Training and exposure visits have been found to be especially useful.

Module 4

Managing Change



2 hours 45 minutes



Module Aims: By the end of this module, you will be able to...

1. Help a client understand where his / her business is in the business life cycle, and use this knowledge to prioritise change.
2. Help a client overcome resistance to change from co-workers and other stakeholders, including by presenting a vision.

Module 4:

Managing Change

ACTIVITY 01

What is Change?

Time: 15 minutes

By the end of this activity you will recognise that change is all around us, at all times.

In some ways, 2010 feels like ancient history! What has changed since then in the following three areas? Take four minutes to make some notes, and then compare your ideas in small groups for another five minutes.

Area to consider	Changes in this area
Shopping	
Sri Lanka Cricket	
Communications	

Key points:

- Change is all around us, all the time. Sometimes we don't even notice change when it happens slowly. Some change we like, some we don't like.
- Some change we start, some we adapt to, and some is pushed upon us.
- Some we accept immediately, and some we may fight against for some time, but you cannot generally force things to stay the same.

ACTIVITY 02

The Business Life Cycle and the Theory of Change

Time: 1 hour 15 minutes

By the end of this activity you will understand the business life cycle, and that different changes are likely at different stages of the cycle. You will also be able to support clients in overcoming resistance to change by communicating a vision.

Activity 2a: The Business Life Cycle

Think about the following four people. Discuss the following two questions in groups, and make notes:

1. How developed is their business?
2. What areas do you think they need to concentrate on at this stage of their business development?



The client and her / his business	How developed is this business? What area needs a focus now?
Aarushi manages the business, and her three brothers take groups of tourists on walks, birdwatching, visiting homes, or visiting temples. But she gets confused about who is doing which trip, with which group. She has too many slips of paper!	
Rukmani has a roadside stall on a main road selling tea, cold drinks, roti and buns. These days, she is getting more foreign customers. She has noticed they never finish their tea. They sometimes look like they are going to buy food, then change their minds.	
Yogi had the only guesthouse in town, with several foreign guests. Now there are new guesthouses, with signs talking about Tripadvisor and Facebook. Someone mentioned bookings online. Yogi feels he needs to make changes but doesn't know where to start.	
Ahmed is a fisherman. He has a boat and an outboard motor. He generally fishes at night. His younger brother and a neighbour work with him. There is a reef with a lot of fish not far offshore. He has noticed that tourists have started coming to his beach.	

The diagram below shows the business life cycle. Your trainer will explain how the diagram works, and help you relate it to the discussion about the four case studies above.

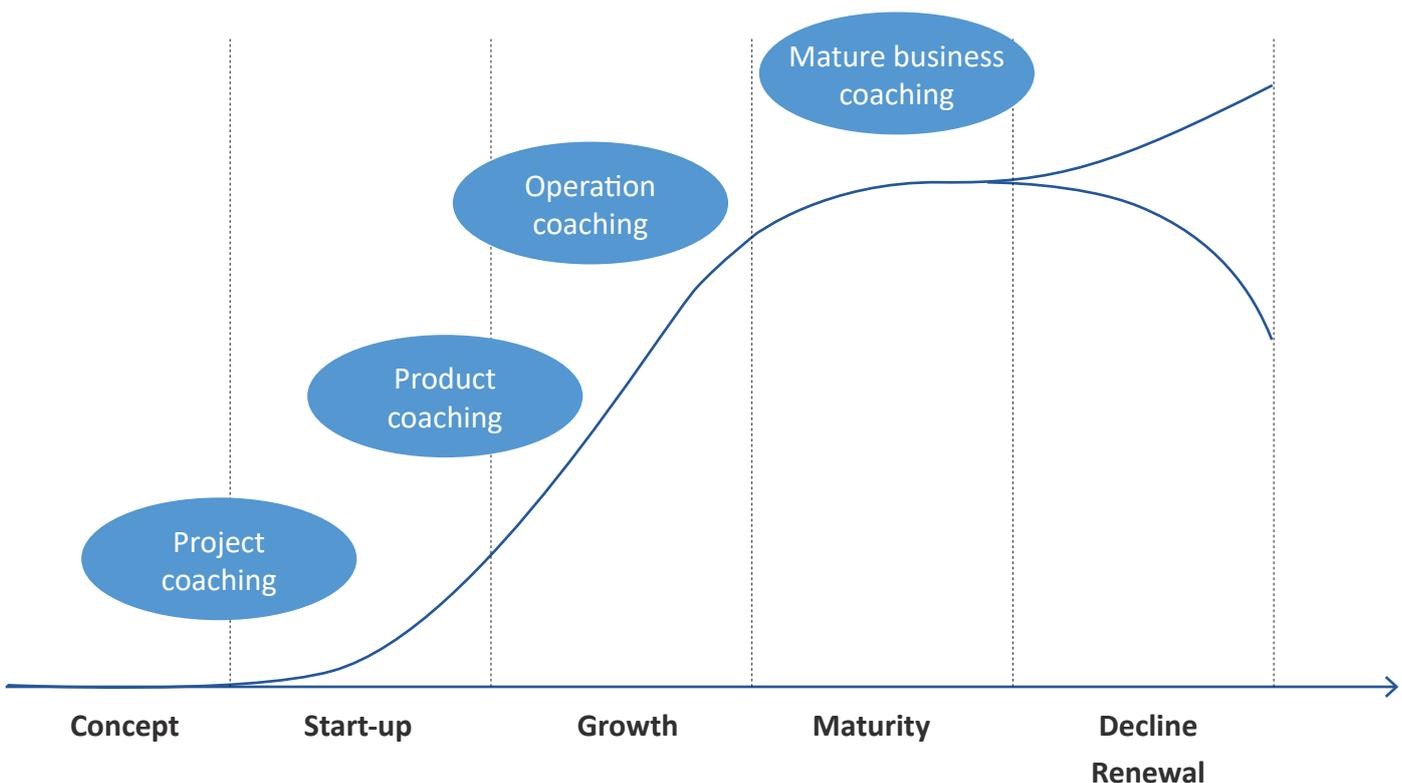


Diagram 04 - 2a: The Business Life Cycle

Activity 2b: The Theory of Change

Question 1

Work with a partner. Discuss the following questions.

- A. Do people always resist change, or do they sometimes welcome it? Can reaction be mixed? Think of examples from your working life.
- B. If people do resist change, what could be the reasons? Kotter & Schlesinger identified four types of resistance; can you guess what they are?

Question 2

Can you help your trainer understand how someone can move through the stages of reaction to change by moving through the stages outlined in the Scott & Jaffe Change Model below?

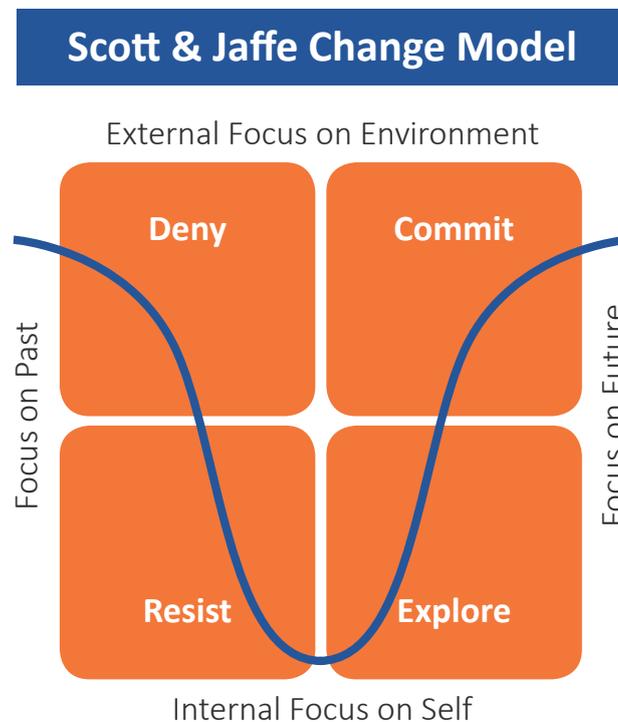


Diagram 04 - 2: The Scott & Jaffe Change Model

Source: Expert Program Management

(<https://expertprogrammanagement.com/2018/05/scott-and-jaffe-change-model/>)

Question 3

What can a change manager do to help people to overcome resistance? What do you suggest for each stage? Discuss in your groups and make notes below.

Deny:	Commit:
Resist:	Explore:

Question 3

Finally, Kotter & Schlesinger also suggested six 'approaches' to help overcome resistance. In groups, match the approaches with their explanations. Each one also considers an advantage (✓) and a disadvantage (✗). Make some notes to support your decisions below.

ACTIVITY 03**Case Studies****Time: 30 minutes**

By the end of this activity you will be ready to engage in role plays, after analysing priorities and likely resistance to change in two businesses.

Do you remember the four case studies we looked at in Activity 2a? Two of them are now going to be developed further. So, look at the two case studies your trainer gives you. For each person fill in the table below.

Ahmed	Aarushi
Where is he in the Business Life Cycle?	Where is she in the Business Life Cycle?
What changes are priorities?	What changes are priorities?
Who may resist these? Why?	Who may resist these? Why?

ACTIVITY 04**Role Plays****Time: 45 minutes**

By the end of the activity, you will have had practice coaching a client how to consider overcoming resistance to change, and received feedback on your performance.

**Role Play 1:**

If you read Ahmed's case study first in Activity 3, then you are Ahmed's coach in this role play. If you read Aarushi's case study first, then you are Ahmed for this role play.

Discuss the changes planned, and focus on who may offer resistance, and what you can do to help overcome this. The coach should guide, rather than direct, offer suggestions sometimes rather than give instructions.

Role Play 2:

If you read Aarushi's case study first in Activity 3, then you are Aarushi's coach in this role play. If you read Ahmed's case study first, then you are Aarushi for this role play.

Discuss the changes planned, and focus on who may offer resistance, and what you can do to help overcome this. The coach should guide, rather than direct, and offer suggestions sometimes, rather than give instructions.

Module 5

Diversity and Inclusion

 4 hours 30 minutes



Module Aims: By the end of this module, you will be able to...

- 1: Recognise your own privileges and marginalisations.
- 2: Define marginalisation and other concepts related to this topic.
- 3: Identify the different types of marginalised groups in your community.
- 4: Identify the challenges and barriers faced by marginalised groups in your community.
- 5: Highlight the benefits of diversity and inclusion for employers and the economy.
- 6: Outline ways in which these groups can be supported and included constructively in the workforce.
- 7: Identify some strategies to deal with client resistance to change.

Module 5:

Diversity and Inclusion

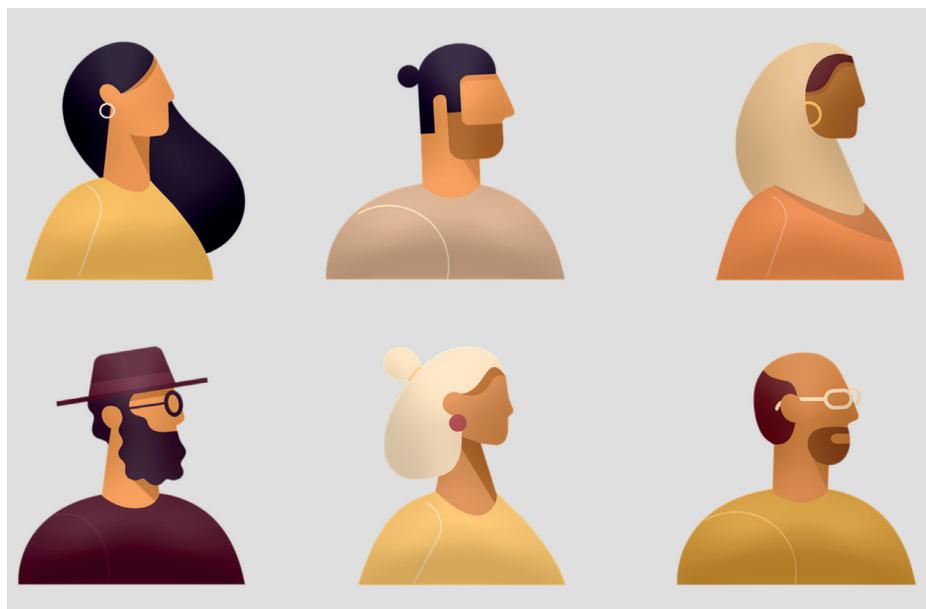
ACTIVITY 01

The Privilege Walk

Time: 20 minutes

By the end of this activity, you will have experienced how differing backgrounds, life experiences and situations can impact people differently and put them at an advantage or disadvantage in life.

Write down how you felt and what you learnt from the walk you just participated in:



Key points:

- › Certain things in life give us privileges, others disadvantage us.
- › What is important to remember is that these privileges / disadvantages are not of our own doing. They are caused by circumstances and events outside our control.
- › Effective coaches are able to 'see' through the eyes of their clients, who may have a very different background, culture, education, experience, hopes and fears to their own.
- › When it comes to diversity, it is the role of the coach to be self-aware and guide the process for both the coach and client.

ACTIVITY 02

Marginalisation in your Community

Time: 50 minutes

By the end of this activity you will have defined the concept of marginalisation and explored it in the context of your community.

Activity 2a: What is Marginalisation?

1. What do we mean by a marginalised group of people or a marginalised community? Work with your partner to write a short definition?

2. With your partner, make a list of different groups who could be considered as marginalised in Sri Lanka:

3. Think of someone you knew or know who belongs to these groups:

- ◊ How have they been integrated into society?
- ◊ What challenges do they face?
- ◊ What kind of support do they receive from the community or government?
- ◊ What do you think needs to be done?

Share your stories and views in your group.

Activity 2b: Related Concepts

In the previous activity, we looked at marginalisation. Now we will look at some more concepts which are related to marginalisation. Your trainer will show you some related concepts for about 30 seconds. Try to remember as many as you can and write them in this box.

With your partner, discuss what you think these concepts might mean.

Now fill in the gaps below with the words given above:

1. _____ is a special benefit that is available only to a particular person or group.
2. _____ are factors in a person's environment that, through their absence or presence, limit functioning and create disability. An example of this would be the stereotypical perceptions that most people hold about people with disabilities.

3. _____ is the process of improving the terms of participation in society, particularly for people who are disadvantaged by enhancing opportunities, access to resources, voice and respect for rights.
4. _____ means variety - it refers to things or people that are different from each other. People can be different from each other by the country of origin, family and ethnic background, race, sex, age, culture, professional background, physical ability and appearance, training, religious or political beliefs and personality.
5. _____ is an automatic response triggered by our brain when making quick judgements and assessments of people and situations. This automatic response operates beyond our control and awareness and often leads people to make quick and often inaccurate judgements which are mainly influenced and shaped by their own background, cultural environment and personal experiences. Another word for this is stereotyping.
6. _____ is any condition of the body or mind (an impairment) that makes it more difficult for the person with the condition to do certain activities and interact with the world around them.
7. _____ is behaviour characterized by the making of unwelcome and inappropriate sexual remarks or physical advances in a workplace or other professional or social situation.
8. _____ is the process of enabling people to increase control over their lives by increasing their resources and by building their capacities to gain access, partners, network and a voice. This concept is connected to social development groups such as the poor, women, youth, older persons and persons with disability.

Activity 2c: Referring to People with Disabilities

1. In this activity, we are going to look at one of these marginalised groups: People with Disabilities.

This activity discusses how to refer to people with disabilities. Many people, often due of lack of awareness, use language which can be hurtful. Because words can hurt, people should be careful when referring to people with disabilities and use language with respect that doesn't hurt. How do you refer to persons with disabilities?

“PWDA, other Disabled People’s Organisations, governments, government and non-government institutions predominantly use ‘person-first’ language when referring to people with disability.” (People with Disability Australia - <https://pwd.org.au/resources>)

“People with disabilities are, first and foremost, people. Labeling a person equates the person with a condition and can be disrespectful and dehumanizing. A person isn’t a disability, condition or diagnosis; a person has a disability, condition or diagnosis. This is called Person-First Language.” (Americans with Disability Act - <https://adata.org/factsheet/ADANN-writing>)

Don't Use	Use
1. Disabled person	Person with disability
2. Mentally handicapped	
3. Slow learner	
4. Dwarf / midget	
5. Deaf and dumb	
6. Blind	
7. Mentally retarded	
8. Special needs	
9. Differently abled	
10. Crippled	

Activity 2d: Test Yourself

Test your knowledge on these fact questions below. Are you a Diversity and Inclusion Champion? Add your total mark and compare your score with your partner.

- What percentage of working age (over 15 years of age) Sri Lankans are women (2019)?
 - 43 percent
 - 53 percent
 - 63 percent
- What percentage of the economically active people in Sri Lanka are women (2019)?
 - 35.4 percent
 - 42.4 percent
 - 52.4 percent
- What percentage of women in Sri Lanka have experienced sexual harassment on public transport (2015)?
 - 50 percent
 - 70 percent
 - 90 percent

4. What percent of working women use public transport (2017)?
 - a. 30 percent
 - b. 50 percent
 - c. 70 percent

5. What percentage of people in Sri Lanka are considered persons with disabilities (2012)?
 - a. 2.7 percent
 - b. 5.7 percent
 - c. 8.7 percent

6. What percentage of the people with disabilities are women (2012)?
 - a. 27 percent
 - b. 37 percent
 - c. 57 percent

7. What percentage of children with disabilities do not receive any education at all (2011)?
 - a. 34 percent
 - b. 54 percent
 - c. 24 percent

8. What percentage of people with disabilities in Sri Lanka are not engaged in any economic activity according to the census report 2012?
 - a. 70.9 percent
 - b. 50.9 percent
 - c. 20.9 percent

9. What is the quota (1988) allocated for people with disabilities for recruitment in government organisations? Is it practised?
 - a. 5 percent
 - b. 4 percent
 - c. 3 percent

Group Discussion: What did you learn from this activity? What are your thoughts?

Key points:

- ✦ People with Disability Australia (PWDA), other disabled people's organisations, governments, government and non-government institutions predominantly use 'person-first' language when referring to people with disability.
- ✦ The basis of this approach is that a person's disability should not be unnecessarily focused on.
- ✦ Person first language acknowledges that a person with disabilities is a person first and foremost.
- ✦ Person first language advocates that a person should not be defined by a medical condition unless the person with the disability wants it said that way.
- ✦ Many people with disabilities also embrace 'identity-first' language. This language is known as 'identity-first' because the identifying word comes first in the sentence and highlights the person's embrace of their identity. For example, "I am a disabled person, like I am an Australian person".

ACTIVITY 03

A Look Inside Yourself: Privileges and Marginalisations

Time: 30 minutes

Aim: By the end of this activity you will have explored the influences in your life which have shaped your privileges and marginalisations and also your and also your conscious or unconscious biases.

In Activity 1, we took part in a walk which pushed us to think about things in our lives which have given us privileges and also things in our lives which have disadvantaged us in different ways. We will revisit this here.

Activity 3a: Introspection - Influences in Life

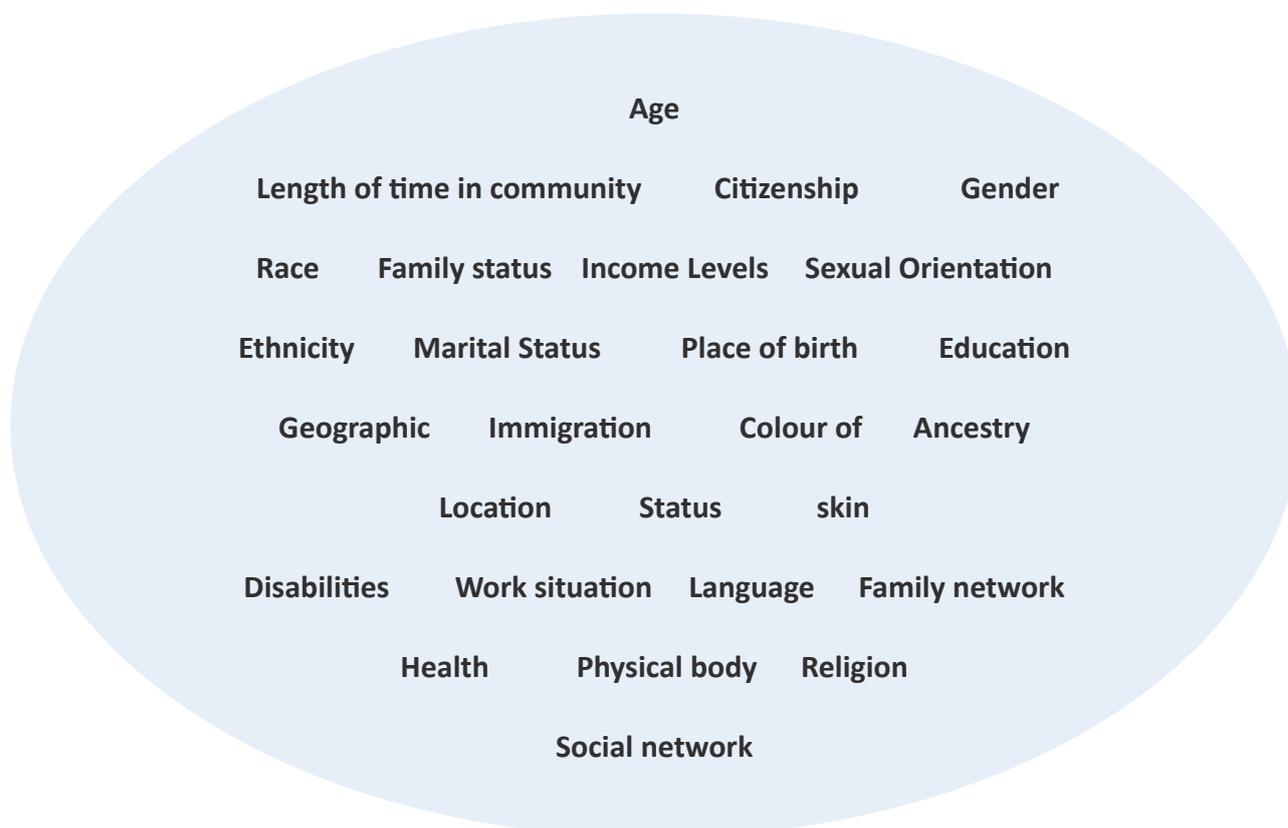
1. Talk to your partner and think about the influences in life that moulds people into who they are. Complete this flower:



2. What do you consider the biggest influences in your life which have shaped the way you are? Discuss with your partners.

Activity 3b: Your Privileges and Marginalisations

1. Use the factors below to explore areas where you have experienced advantages or disadvantages in your life. Circle the ones which have given you an advantage in life. Put a box around the ones which you think have disadvantaged you. In some cases, it could be both.



2. Discussion in Pairs

If you feel uncomfortable talking about these topics above, then you don't have to talk. It's your choice.

If you are okay in discussing this, then share with your partner one factor which has been an advantage and one which has been a disadvantage to you. Share the reasons why.

Key points:

- A person's social identity then helps to shape the way they experience and view the world and these in turn shape the conscious and unconscious biases they hold.
- Conscious and unconscious biases can affect the judgments we make and the decisions we make and this can have positive and sometimes negative impact. We need to be careful when these impact another person negatively.
- Ensuring everyone knows unconscious bias exists is the first step to avoiding it.

ACTIVITY 04

Changing Perceptions Through Time - Models Of Disability

Time: 25 minutes

Aim: By the end of this activity, you will be able to understand how perceptions of disability have changed and progressed through time around the world and be able to compare to the perceptions and support for disability in your own community.

Activity 4a: Models of Disability

Historically, perception of disability has progressed and come a long way. These models represent the way people with disabilities were perceived and policies of governments and organisations were and are still based around these views.

- Here are some models which have been used to describe disability through the years. Can you draw an arrow through them to show the oldest to the most contemporary model?

<p style="text-align: center;">Medical Model</p> <p>This views people with disabilities as incapable of fitting into mainstream society. They are broken.</p>	<p style="text-align: center;">Charitable Model</p> <p>Views people with disability as being vulnerable, and reliant on people without disability to perform certain tasks.</p>
<p style="text-align: center;">Human Rights Model</p> <p>This views disability as a natural part of human diversity and must be respected in all its forms. People with disabilities have the same rights as everyone else in society, and governments need to play a role in upholding these rights. The model exists because of The United Nations Convention on the Rights of Persons with Disabilities</p>	<p style="text-align: center;">Social Model</p> <p>This asserts that the limitations people with disabilities experience are the result of inaccessible systems and barriers in mainstream society. People with disabilities are disabled because of the environment they live in, not the features of their own bodies. The social model of disability emerged from the work of the World Health Organization (WHO) that redefined disability.</p>

- Discuss in your groups what these models might mean in practice or in the real world.

Activity 4b: Case Studies

1. Read the case studies below and match them to the models to which they apply:

Case Study A:

A group of doctors have established an organisation to provide support to people with physical disabilities. The organisation is reliant on donations from the community. In order to get these donations, it portrays people with physical disabilities as victims of their condition who cannot do anything for themselves. Nobody with physical disability is on staff or on the board and input has not been sought from people with physical disabilities to determine which services are most needed, or how and when these services should be provided. Although the organisation has been established with the aim of assisting people, these are not recognised as the experts and do not have a say in how the service is run. According to this model, the person with the disability is dependent on the mercy of others and is not consulted on how the organisations should cater to them.

Case Study B:

Hejaan is visually impaired. He wants to take an immigration test to move abroad. He would like to know what facilities are available to help him do this test. According to this model, it is the exam provider's responsibility to provide accessibility to Hejaan and also to provide him with the materials which he can access through braille and audio support. Once these barriers are removed, Hejaan should be on an equal footing to others without this disability. However, this model doesn't go so far as to involve the government in ensuring that the organisations are equipped with the right support. So, if the exam provider does not have the right support, it is too bad for Hejaan.

Case Study C:

Sumaiya is 8 years old and uses a wheelchair. She is very intelligent. She cannot attend her local school because the buildings are not wheelchair accessible. Therefore her family has been advised to put her in a special needs school where there are a mix of children with different kinds of disabilities eg. children with intellectual disabilities. Sumaiya is not happy to be in this school. She is afraid to go there and cries. She is not being intellectually challenged. Her mother is very upset because she feels that her child's needs are not being met. She is thinking of removing her and keeping her home. According to this model, it is Sumaiya's problem and she has to do with what services are available. She should be sent to an institution which can care for her because she is not normal.

Case Study D:

Amal is 25 years old and has a speech and hearing impairment. He has been working in the accounts department of a big hotel. Now he has met a girl who has a physical impairment and works with him. She likes him and he wants to marry her. However, his parents don't want him to get married because they don't think they will be good for each other. According to this model, Amal has not only the right to work where he pleases and it is the responsibility of the establishment to provide for his special needs, he should also be able to decide who he wants to marry and when. Amal has the right to resort to the government for help on this.

Activity 4c: Differences between the Old and New Models

What is the difference between the old and the newer views towards people with disabilities?

Old view: Medical and Charitable Models	Newer View: Social and Human Rights Models
Role of Person with Disability	
Strategies to Address Disabilities	

Activity 4d: Group Discussion

Where do you think Sri Lanka stands with regards to these models? Which model does it apply to?

What is your personal view on this? Which model does it coincide with?

Key points:

In 2006 The United Nations Convention on the Rights of Persons with Disabilities document was finalised.

The Sri Lankan government signed and ratified the convention. In doing so, it made a legal commitment to uphold the principles the convention establishes. The human rights model exists because of this UN convention.

The human rights model:

- ✦ Embraces impairment
- ✦ Recognises the right of people with disabilities as experts in all matters that affect them
- ✦ Recognises that equality does not mean treating everyone the same way
- ✦ Places accountability on governments to take action

ACTIVITY 05

Barriers faced by People with Disabilities and Women in Sri Lanka

Time: 25 minutes

Aim: By the end of this activity you will have explored the barriers to full and equal participation in society faced by people with disabilities and women.

On the next page you will consider two case studies.

Activity 5a: Case Studies

Read the case studies below:

Case Study A:

Sharmila has been running a small food stall outside her house and she thought about getting registered as a business. This would allow her to feel like a proper business woman, and she dreamed of one day starting a proper restaurant with cooking classes for the tourists who visit. However, after trying, she soon decided against this going through with the registration. When she reached out to the officials for information and forms she was ignored, and worse, one of the officials made rude comments to her and did not treat her properly. When she spoke to her brother about the experience, he said 'what do you expect, a woman like you cannot be doing things like that'.

Case Study B:

Priya is a young woman with a congenital hearing problem.

After O/L exams she stopped schooling and spent a house-bound life. Her parents didn't think it would be easy for her to work, they were afraid of sending her outside the home so they kept her homebound. She was depressed and slept most of the time as she didn't find any way of doing anything constructive to make her feel recognised. Priya is interested in developing a vocational skill and is especially interested in joining a beauty culture course but her parents believe that it's too risky to send her out for a long-term course.

2. Discuss the following questions in your group:

- a. Are these situations common in Sri Lanka? Are there any problems that you have seen or observed?
- b. What do you think is the situation for these groups in terms of inclusion in other countries?
- c. Do you think Sri Lanka needs to change with this regard? Why?
- d. Do you think this should be left for the government to do? A top down approach?
- e. Do you think society should also be involved and mobilized in bringing about this change? Bottom up?

Activity 5b: Challenges and Barriers in your Community

People with disabilities and women are marginalised as they face various barriers and challenges which keep them from having equal participation in society. These barriers can be personal or family driven, society and culture based or due to the environment around them. Your trainer will put you in different groups: A, B, C, D. You will talk to each other and learn about the different kinds of barriers. While you are listening, you can make notes in this table. But don't write long sentences, just points.

Source of barriers	Barriers for People with Disabilities (PWD)	Barriers for women
Personal and family		
Society and culture		
Environmental and transport		
Employment and working environment		

ACTIVITY 06**Analysis: Case Studies - Success Stories****Time: 40 minutes**

By the end of this activity you will have shared success stories of five people with various disadvantages who despite their limitations were able to create business advantages for their employer, or themselves to become self employed

Activity 6a: Case Study of Yasaru - A Reading Task

Read Yasaru's story below and answer some questions that your trainer will ask:

Situation:

A NGO organisation has offered to train Yasaru to become a tuk-tuk driver tour guide which is a new concept they are promoting. Yasaru is interested in applying for this. This is his background.

1. What type of limitation is Yasaru experiencing?

- ✦ He is a 10-year experienced tuk-tuk driver, but he cannot walk (lower mobility limitation due to polio, both legs)
- ✦ He does not have a driving license; he does not know the process for obtaining it, considering his disability
- ✦ He uses a wheelchair and tricycle. For Inhouse use, he uses a tricycle for bathing and toilet and outside purposes, he uses a wheelchair.
- ✦ He can sit and work - he works from 6AM – 10PM while sitting in the Tuk Tuk. Also, he has travelled to Colombo and other places with his friends many times.
- ✦ He has a limitation in using the toilet outside his house. He needs support in that.
- ✦ He has no difficulties in his upper body.

2. What are the essential job duties of a 'Tuk-Tuk Driver - Tour Guide'?

- ▶ Tour guides are responsible for helping guests to visit unfamiliar sites/areas. They usually conduct special/customised trips in order to show the important historic places, monuments, wildlife and religious places of interest.
- ▶ The essential functions of a tuk-tuk driver – tour guide are:
 - Pick up all guests and greet them promptly at scheduled tour time with a warm smile
 - Determine if any guests have physical restrictions that should be considered
 - Drive guests to the places of interest
 - Provide information about touristic sites in an engaging and clear manner
 - Interact with guests and answer guests' questions about the area and local places of interest
 - Arrange regular cleaning and maintenance services for the vehicle
 - Apply all safety, security protocols and first aid that need to be complied

3. Does it affect the performance of the essential functions?

Yes

4. What essential job duties may be problematic? What reasonable adjustment or change may be required to allow Yasaru to perform these duties?

Essential Duties on the Job	Required Adjustment
Pick up all guests and greet them promptly at scheduled tour time with a warm smile	Provide prior information to guests about his mobility limitation Greet guests while seated in his tuk tuk
Drive guests to the places of interest	Conduct only half-day trips if he cannot stay in sitting position for a long period of time or if he cannot use toilet outside home
Provide information about touristic sites in an engaging and clear manne	Briefly present each touristic site before letting guests visit on their own Provide a hand drawn map of each site being visited, pathway and location of the next pick up, as a user-friendly tool for guests so they can experience on their own

<p>Interact with guests and answer guests' questions about the area and local places of interest;</p>	<p>Communicate phone number to the guests so he can be reachable during the visit at any time.</p> <p>OR provide a basic mobile phone to the guests so they can reach him out in case they haven't purchased a local SIM card.</p> <p>At the end of each site visit, conduct a short debriefing to get feedback from the guests. This could be done on paper or casually by asking questions.</p>
<p>Apply all safety, security protocols and first aid that need to be complied</p>	<p>Install a hand brake in case he cannot break the tuk-tuk with his foot (safety measure).</p> <p>Install a ready-made rooftop attachment for surfboards and other materials so that guests can load and unload their equipment without driver's support.</p> <p>Add a sticker inside the tuk-tuk with all the emergency contact details.</p> <p>During the introduction, he should inform guests about where the first aid is located inside the tuk-tuk.</p> <p>Driver to conduct regular check of his tuk-tuk to avoid breakdowns during a tour.</p> <p>Driver to keep a fuel bottle and not run out of petrol during a tour.</p>

Yasaru now is a legal holder of a license and works as a tuk tuk tour guide for tourists and earns a good income.

Activity 6b: Case Studies - Success Stories - Mini-presentations

Your Trainer will now divide you into groups: A,B,C,D,E. Each group gets a case study of a success story:

- ✦ Case Study A = Ruwanthika
- ✦ Case Study B = Ilhas
- ✦ Case Study C = Lalitha
- ✦ Case Study D = Sanjana
- ✦ Case Study E = Jasmine

Read about the success story of the person in your case study. Discuss with your groups and design a basic structure to present it to the other groups.

Your trainer will regroup you and you can then present your success story to your new group.

Key points:

For businesses, diversity and inclusion leads to:

- ✦ Enhanced reputation
- ✦ Improved customer care
- ✦ Improved market share
- ✦ Improved innovation
- ✦ Improved productivity
- ✦ Increased creativity
- ✦ Superior solutions to problems

ACTIVITY 07

The Business Case for Hiring Diverse Groups

Time: 45 minutes

By the end of this activity you will have highlighted the advantages that marginalised groups have to offer to businesses.

Activity 7a: Group Discussion

In the previous activity, we have already discussed the following question:

1. How do they as coaches think their clients would feel about hiring marginalised groups?
Discuss some more questions in your group:
2. How would coaches be able to overcome that resistance?
3. How would they encourage them to hire marginalised groups?
4. What support would they need to be able to convince clients to employ these groups?

Your trainer will show the Scott and Jaffe Model of Change which you already looked at in the module on Change Management. Let's apply it to this scenario.

Activity 7b: Reasons to Include Diversity at the Workplace

Your trainer will hand you three case studies. Work with your groups to read the three case studies of hotels.

1. Discuss the advantages of including diversity at workplaces and make some notes below:

Reasons for Including Diversity at the Workplace

Activity 7c: Evaluation of the Different Marginalised Groups

1. Your trainer will give you a task. Work with your group to complete the task. Your trainer will assign you a marginalised group to think about. The task requires you to think about the following things:
 - a. type of resistance that employers may exhibit in hiring that group
 - b. the advantages the marginalised group can offer to the workplace
 - c. any reasonable adjustments that employers would have to make in order to make a comfortable working environment for these groups.

Key points:

- ✦ For both PWD and women, stereotypes and beliefs about them are major barriers to employment and entrepreneurship.
- ✦ For PWD, the National Policy on Disability found that low levels of private sector employment was largely due to the attitudinal barriers posed by employers.
- ✦ For women, gender stereotypes are both personal (their individual beliefs) and external (society's beliefs).
- ✦ In addition, women face a major barrier in balancing the domestic role with income earning, and often lack support from male partners. This challenge can lead to high turnover rate and perpetuate the view of women as 'not suited' to workplace roles.

ACTIVITY 08

Changing Mindsets - Dealing with Resistance

Time: 35 minutes

By the end of this activity you will have developed strategies to deal with resistance to change expressed by clients in relation to inclusion of marginalised groups.



Activity 8a: Responding to Client Resistance

Work in pairs with your partner:

Participant A: You are the business client who doesn't want to hire from marginalised groups.

Read these reasons to your partner who is your coach.

1. "My establishment is not accessible so I can't employ a person with disabilities"
2. "A receptionist with a hearing impairment cannot hold his job any longer."
3. "People with disabilities are not hard working"
4. "People with disabilities need a lot of time off"
5. "Hiring someone with a disability doesn't look good for my business"
6. "Hiring women into my all-male team wouldn't make a substantial difference".
7. "Younger people are harder to manage."



Participant B: You are the Coach. Respond to your resistant client.

1. "But not all disabilities need specific equipment or adjustments. Furthermore, many technical and financial aids allow you to make reasonable adjustments quite easily.
2. But you could be wrong there. Have you ever considered giving him equipment (an amplifier) so that he can keep doing his job? You don't want to lose a good employee.
3. No, I think you are mistaken there. Persons with disabilities are as capable, independent and productive as any other employee and often they are more so especially in terms of commitment and hard work. They are also work oriented and their enthusiasm motivates other team members.
4. Hmm... I really don't think that is true - it has been shown through surveys and research done on this topic that the rates of absenteeism among PWD is less than other employees. They are highly motivated, engaged and less likely to switch to another employer.
5. Hmm.. that is a misconception people often have but in fact the opposite is true. Having a diverse team adds humanity to your organisation that customers admire and appreciate. You can actually get more business. Have you ever heard of the term 'ethical employer'? In today's world there are customers who buy especially from ethical employers. It can be a niche marketing strategy for some companies.

6. Well I really don't think so, in fact it will be good for your staff to have some diversity - Increasing diversity by hiring women is good for business. Females have a greater understanding of the needs of female customers, and a female presence makes your business seem "safe", for example, solo female travelers feel more comfortable staying at hotels that have female staff. Gender diversity increases collaboration and communication, as well as innovation.
7. Actually, I would disagree with that - young people have a learning mindset and do not have old habits that are hard to break. They are comfortable adopting the use of new technology and their presence can attract younger customers.

Activity 8b: Preparation for Role-play

Read these steps that a coach can take to start the discussion on the inclusion of PWDs and on gender inclusivity.

1. Here are some steps to take in order to promote inclusion of PWDs. Put these in the correct order:

- A. **Share information** regarding disability-inclusive practices, case studies and what other businesses and other competitors are doing.
- B. **Start a conversation** - ask the question, 'Are persons with disabilities being included in your company, and in your services / products?'
- C. **Review your client's processes**, operations, recruitment etc. How can they be made more accessible for PWD.
- D. **Share success stories** or arrange exposure trips
- E. **Encourage your client**, and others in their business to attend training

2. Steps to take in order to promote gender inclusivity:

1. **Start a conversation** - ask the question, 'Are women being included in your company, and in your services / products?'
2. **Share information** regarding gender inclusive practices, case studies and what other businesses and other competitors are doing.
3. **Share success stories** or arrange exposure trips.
4. **Encourage your client**, and others in their business to create a safe working environment, with zero tolerance for sexual harassment.
5. **Review your client's processes**, operations, recruitment etc. how can they be made more inclusive for women?

Activity 8c: Role Play

A. Role-play 1, A = Coach, B = Nasheed the Hotel Owner

Case study

Mohamed Ilhas is hearing and speech impaired. He hails from a farming family in Arugam Bay. Four of his five member family are afflicted by the same impairment as Ilhas, and are challenged in completing their education and obtaining employment. The family has so far existed on their father's meagre earnings as a farmer. Ilhas has had an abiding interest in tourism, as it is the main livelihood for most residents of Arugam Bay. His passion, however, is cooking.

The coach is working with a prospective employer Nasheed who owns a small hotel close to Arugam Bay. Nasheed is resistant and has doubts about how he could hire Ilhas.

The coach would like to convince Nasheed to hire Ilhas.

Role-play 2, A = Coach, B = Jasmine

Case study

Aruna Jasmine's childhood had been one of hardship, she gave up school and at 19 she married, hoping that her married life would be better than her childhood experiences. But that was never to be. After 12 years of marriage her husband left her and 2 kids for another woman.

She had no option but to start working in order to look after herself and her children and she tried her hand at various jobs including sewing, but that income is hardly enough to meet the basic needs of her family. She has now got to know about the NVQ – 4 course in Cookery supported by Miani Technical Institute, Batticaloa.

However, she is skeptical about the training opportunities and employment in the Tourism Industry. For one, she is worried about going back to a classroom at her age, and the stigma that is usually associated with women working in hotels. There is also the issue of having to leave her kids alone while in training or in employment downstream.

The coach is meeting Jasmine and would like to persuade Jasmine to join this cookery course and make her feel confident about her own abilities and also calm down fears of working in hotels.

Module 6

Communication Skills



5 hours 45 minutes



Module Aims: By the end of this module, you will be able to...

1. Identify barriers to clear communication
2. Evaluate your strengths and weaknesses as a communicator
4. Use techniques to enhance your communication skills
5. Identify useful questions and use those effectively for coaching

Module 6:

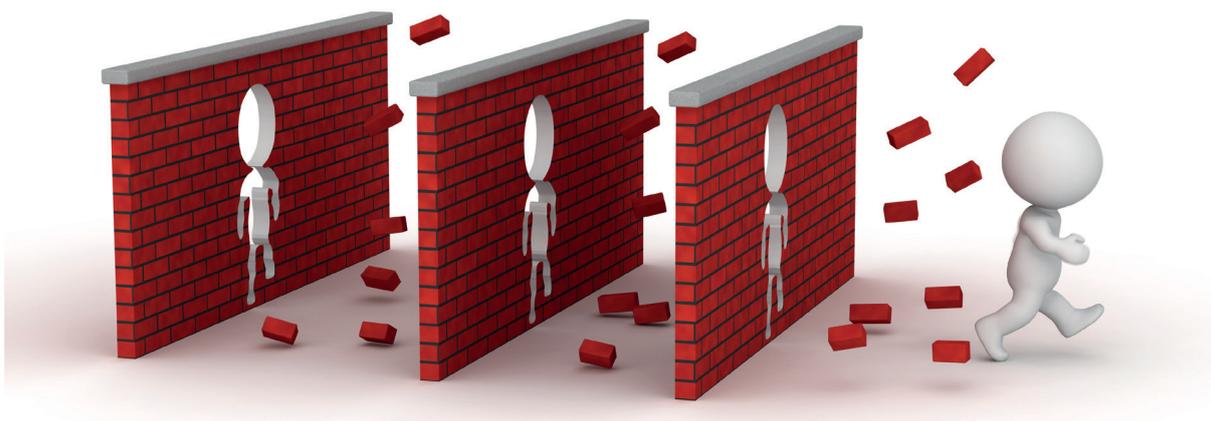
Communication Skills

ACTIVITY 01

Warmer: Barriers to Effective Communication

Time: 30 minutes

Aim: By the end of this activity you will have identified barriers to listening.



Discuss with your partners:

- › What causes breakdown in messages between people?

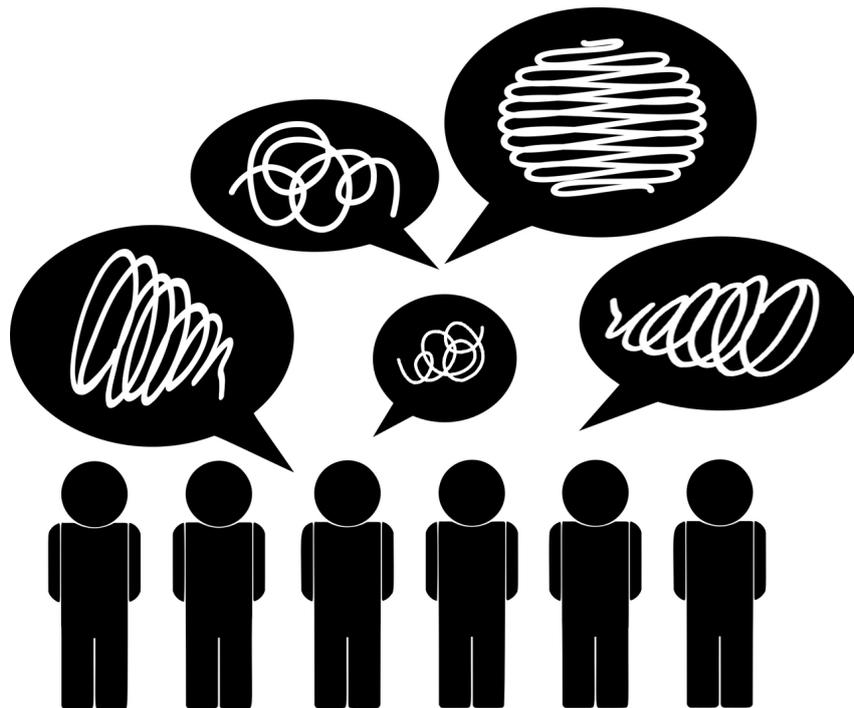
Your trainer will give you instructions. You will be involved in listening and delivering a message to your group members. Follow the instructions.

Key points:

- › When communication doesn't happen, conflict often does.

ACTIVITY 02**Miscommunication: A Personal Scenario****Time: 20 minutes**

By the end of this activity you will have described a time in their life when a miscommunication caused an argument or an uncomfortable situation.



Words are powerful. We have all been in situations where something we said was misunderstood. Perhaps it caused offence, or led someone to take an action different from our intention.

Think of a situation in your life where this happened and which led to an argument. Tell your partner about it.

Looking back at this, do you think you could have done something differently to change the result?

Key points:

As a business coach, effective communication:

- › Is the foundation of your coaching practice.
- › helps you to understand your client and their business.

ACTIVITY 03

What is Effective Communication?

Time: 15 minutes

By the end of this activity you will have described what effective communication skills means.

Work in groups and write a definition for Effective Communication Skills. You can copy below:

**Key points:**

Effective Communication:

- helps to set effective goals, to monitor and provide feedback
- Is the backbone of a productive coaching relationship

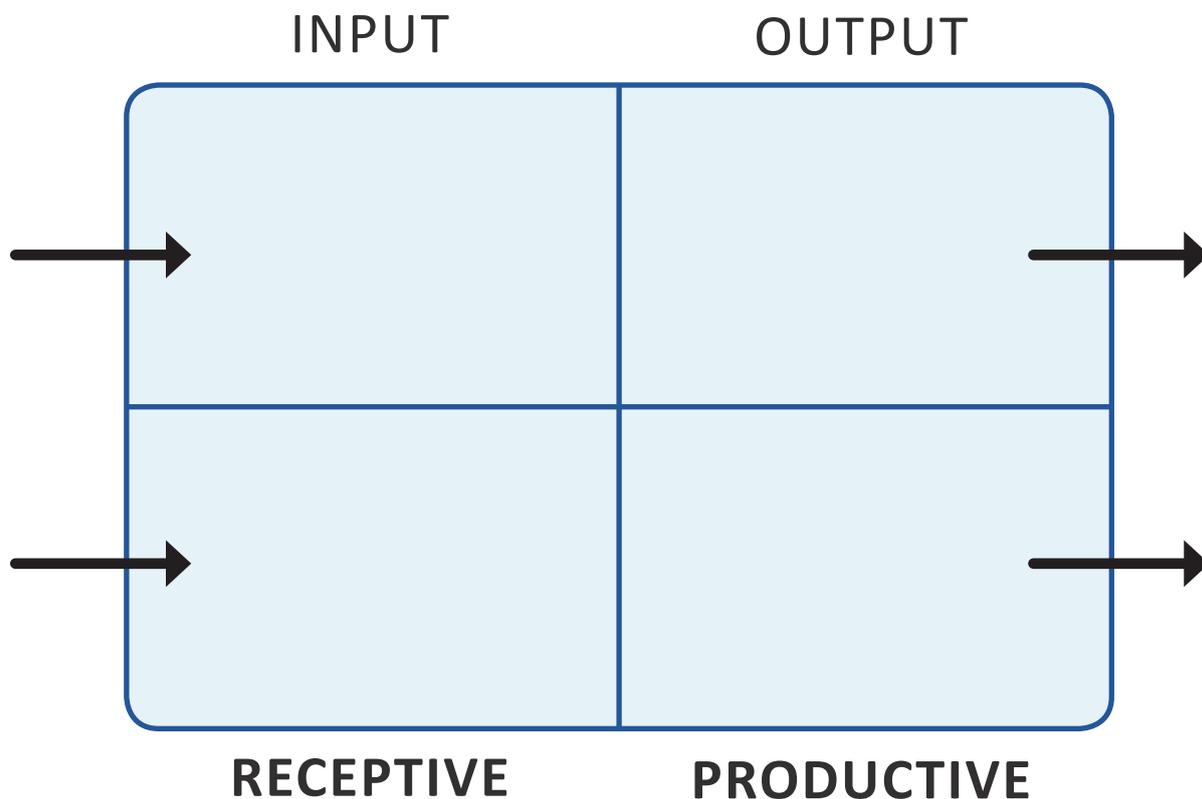
ACTIVITY 04

The Four Communication Skills

Time: 15 minutes

By the end of this activity you will have identified the four communication skills and will be able to describe the relevance of these to coaching.

1. What are the five senses by which people communicate?
2. What are four communication skills?
3. The diagram below shows a representation of the four skills in terms of input and output and in terms of skills that are receptive and productive. This means that some skills are used for receiving input and some are used to produce output. Can you put the four skills in the appropriate boxes in the table below:



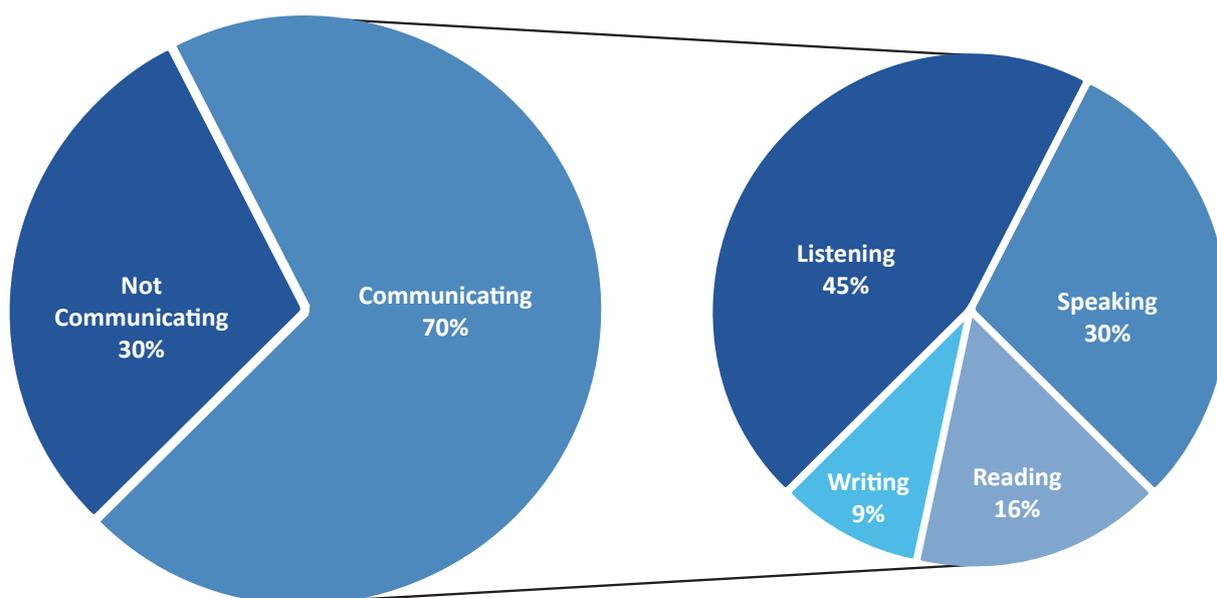
4. Put these skills in the order of how much you use them in your life. Write these below in the order of 1 - most highly used and 4 - least used. In the second column, write down as a percentage of your total communication:

Skills in the order of use	Percentage of total communication
1.	
2.	
3.	
4.	

Share your answers with your partner. Do they have the same pattern?

5. Now study the pattern which was researched and presented by Adler, Rosenfield and Proctor in 2001. What does the diagram below show? Is this pattern similar to yours? Discuss with your partner:

Time Spent Communicating



Based on the research of: Adler, R., Rosenfeld, L. and Proctor, R. (2001)

Interplay: the process of interpersonal communicating (8th edn), Fort Worth, TX: Harcourt.

Diagram 06 - 4: Time Spent Communicating

6. Discuss these questions with your partner:

- Which skills did teachers focus most on teaching when you were in school?
- What skills do you think we might need more help with?
- Which skills do coaches use most?
- Why do coaches need good communication skills?

Key points:

- ✦ Communication is one of the most important skills a coach can have.
- ✦ It is not just about demonstrating your skills as a coach, it's about creating a relationship with the person in front of you.

ACTIVITY 05

How Well do you Communicate?

Time: 20 minutes

Aim: By the end of this activity you will have identified your strengths and weaknesses as communicators and will be more aware about which areas need more work.

Activity 5a: Self Evaluation Quiz

Read the following habits listed in the table below and decide how often you do them. Mark 1 - 5, where 1 means 'always' and 5 means 'never' in the second column below:

Your listening habits	Always	2	3	4	Never
I listen to people with whom I disagree.	1	2	3	4	5
I find it easy to participate in conversations where the subject is of no interest to me.	1	2	3	4	5
Even when I think I know the message the speaker is trying to get across I keep listening.	1	2	3	4	5

I give signals to show that I understand and am interested – nod, smile, posture, ‘really’, ‘oh dear’, ‘did you?’	1	2	3	4	5
I ask people to explain things I don’t understand.	1	2	3	4	5
I wait for the speaker to finish speaking fully before I reply.	1	2	3	4	5
If I am not ready to listen, I will tell the person.	1	2	3	4	5
I understand that words can sometimes mean different things to different people.	1	2	3	4	5
Even if I don’t like the other person, I listen carefully to what he or she says.	1	2	3	4	5
I anticipate other people’s reactions when I speak or write.	1	2	3	4	5
I look for the speaker’s meaning behind the words.	1	2	3	4	5
I look at the person who is talking.	1	2	3	4	5
I plan ahead what I say or write to other people. This helps me achieve my goals more easily.	1	2	3	4	5
I know which words and phrases cause me to react emotionally.	1	2	3	4	5
I concentrate on the other person’s message rather than on physical appearance.	1	2	3	4	5
Your Total Score (Add your points)					

Now share your answers and your listening habits with your partner.

Activity 5b: Group Discussion

1. What did this exercise teach you about yourself?
2. As a coach, why do you need to know this about yourself?

Key points:

- A coach's ability to listen is one of the most important skills they use to facilitate coaching.

ACTIVITY 06

Active Listening

Time: 45 minutes

Aim: By the end of this activity you will have identified actions and behaviours which need to be used and avoided in order to listen actively.

Activity 6a: Partner Discussion

Talk to your partners:

1. Think of someone in your life who you think is a bad listener. What makes them a bad listener? How do their actions make you feel? Do you like talking to them?
2. Think of someone in your life who you think is a good listener. What do they do that makes you think they are a good listener? How do you feel after talking to them? Do you like talking to them?

Activity 6c: Activity Listening Activity

1. Your trainer will ask you to take part in a listening activity. Follow your trainer's instructions.
2. Who listened better? A or B?
3. After you have finished the roleplay, work together in a group of A, B and C to complete this table. Write down behaviours that bad listeners exhibit and those that good listeners demonstrate:

Bad Listeners	Good Listeners

Why is this important for coaches?

Key points:

- ✦ Active listening requires full and active engagement, rather than passive hearing.
- ✦ It is a conscious decision to pay attention and understand what your client is saying not only through their words but also their body language and tone of voice.
- ✦ When you practice active listening you can also obtain information from what a client is **not saying**.

ACTIVITY 07

Ten Steps to Effective Communication

Time: 40 minutes

Aim: By the end of this activity you will have discussed ten higher-level communication practices and will be able to clearly distinguish bad practices from good practices.

Activity 7a: True or False?

Discuss your answers with your partner and write what you think in the column below:

	Statements	T / F	Were you correct?	Step Number
1.	If the person you are talking or listening to doesn't make eye contact with you, you should mirror them and not look at them too.			
2.	When in a conversation, you should not lose your eye contact with your partner even for a second. Keep your eye contact fixed on your subject only.			
3.	While listening, it's important to focus on the speaker's accent or speech mannerisms eg. how they move their hands while speaking or facial expressions.			
4.	If the person you are speaking to is slow, it's okay to help him finish his or her sentences by interrupting and finishing the sentence yourself. This will speed up the conversation.			
5.	While listening, it's a good idea to plan your next sentence, it saves time and energy.			

6.	If the client doesn't understand what has been said, try not to be critical. Try to be supportive and find a way to explain the concept in an easier way.			
7.	Nowadays, on many TV talk shows and reality shows it is common to see many people talking loudly and overrunning each other's speech.			
8.	If you don't understand something the speaker says, you should quickly stop the speaker and ask for clarification immediately.			
9.	Hijacking (switching topics) is a good technique to use when you are stuck listening to a boring speaker.			
10.	If you notice that your conversation partner is looking uncomfortable, it's best to just ignore and keep talking.			
11.	If you are listening to someone talking about a problem, you should suggest a smart solution as soon as possible.			
12.	Use complex and difficult language to impress the listener.			

Activity 7b: Wall Reading to Check Answers

Your trainer will put ten steps to effective listening around the room. Work with your partner and walk around and read the different texts.

Go back to Activity 7a and use the second and the third column to check if your answers in the True / False activity were correct. Find the section of the text where you can spot that answer, and write the step number in column three.

Activity 7c: Reading and Discussion

Talk to your partner:

1. How is this advice useful for a coach?
2. On a personal level, do you think these suggestions could improve your listening skills?
3. Do you think this advice will be difficult to implement in the Sri Lankan culture and context? Do you think in the Srilankan context, this advice is realistic and practical?

Key points:

Some things to remember before starting your coaching session:

- ▶ Prepare beforehand - set aside time before your coaching session to clear your mind
- ▶ Tune in to keywords and phrases, don't try to focus on everything
- ▶ Learn to notice your internal dialogue - are patterns to thoughts that distract you or triggers that make you want to interrupt
- ▶ Learn to create good notes that are succinct and meaningful to you. Note-taking shows you are paying attention, but do so in moderation

ACTIVITY 08**Active Listening Techniques****Time: 40 minutes**

Aim: By the end of this activity you will have practised paraphrasing, echoing, reply questions, checking understanding and summarising to support clear communication.

Activity 8a: Paraphrasing, Echoing, Reply Questions, Checking Understanding and Summarising

Below is a dialogue that explains the importance of paraphrasing, echoing, reply questions, questions to check understanding and summarising skills, which are all part of active listening.

Work with a partner to take the roles of A and B. Read out the dialogue with your partner using the script below:

A	B
This task is about paraphrasing, echoing and the use of reply questions.	
	Paraphrasing?
Yes, paraphrasing – it's a bit like rephrasing.	
	You mean like putting it in other words?
That's right. Using different words to summarise and clarify the meaning for the listener. Does that make any sense?	
	Okay, I get it. But you also mentioned echoing.
Yes, echoing. Echoing is when you as the listener repeat key-words to show you are listening.	
	I see. In other words, you are saying that it helps the speaker know that you are following the message.

Yes but It also encourages the speaker to give you more information.	
	More information?
Yes, and I think this is really important when you are coaching and you want your client to open up and tell you more. I especially like them because they allow the listener to input some energy and interest into the conversation.	
	Yes I can see how that happens.
So in other words, Echo questions help to build a conversation.	
	Do they?
Yes and again, I think they can be valuable in any situation where you want to develop a conversation. So, coaching would be one of them.	
	Hmmm.... And what are reply questions?
Reply questions are also another technique a listener can use to encourage the speaker to elaborate more on the topic for example do they, are they?	
	Aaaaah.. I see So they are not a real question but more like a technique to get the speaker to give you more information.
Yes, exactly .. sounds like you have understood?	
	Yes I think I have. So basically you've told me about four different techniques to improve listening and engagement: 1. Paraphrasing, 2 Echoing and 3 Reply and 4 Checking understanding.

Activity 8b: Language Analysis

After acting out this dialogue, work with your partner again and read the script carefully and underline and put a number against examples of:

1. Paraphrasing
2. Echoing
3. Reply questions
4. Checking understanding
5. Summarising

Activity 8c: Back to Back Drawing



Work with your partner. Your trainer will give you a picture. You will sit in a back to back position with your partner. Describe your picture to your partner so that your partner can draw a picture as close as possible to what you have. Make sure you communicate clearly. Use the techniques above to support your communication.

Your partner will do the same with you.

A colleague will observe and provide you some feedback on your performance.

Key points:

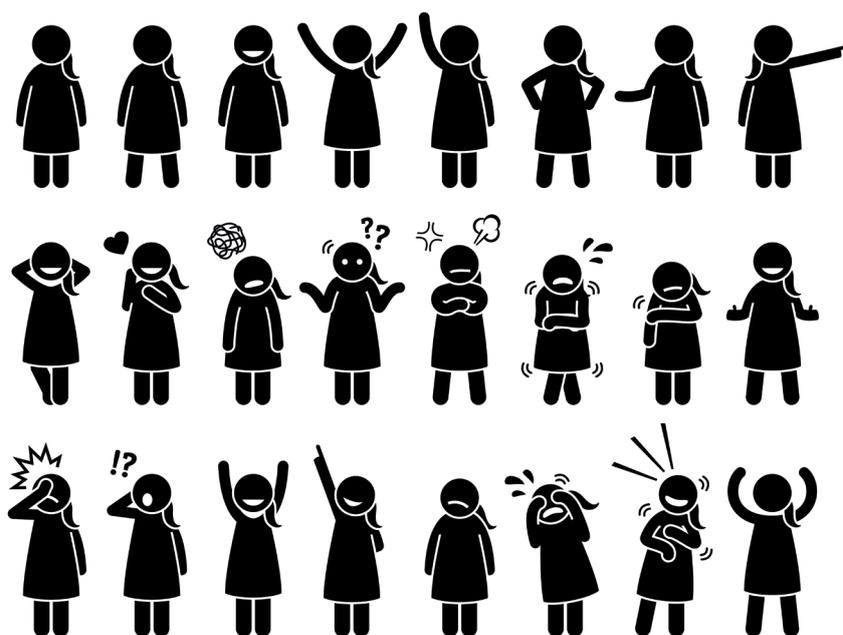
- ✦ As a coach, you must not only listen actively yourself but also pay attention to how your client listens when you speak.
- ✦ If they are staring over your shoulder or fidgeting it can be a sign that they are not paying proper attention.
- ✦ Consider switching up your topic, asking a question or changing to a new activity to re-engage your client.

ACTIVITY 09

Body Language

Time: 45 minutes

Aim: By the end of this activity you will be able to distinguish between good and bad body language in terms of effective communication



Activity 9a: Preparation for Role-play - Mirroring and Body Language

You are going to take part in a role-play involving three people. This role-play revolves around Rukmani. You will remember that we have already studied Rukmani's problem in Module 4.

Again, read Rukmani's case:

The Client Rukmani

Rukmani owns a roadside stall on a main road selling tea, cold drinks, roti, buns and ribbon cakes. These days, she is getting more foreign customers. She has noticed they never finish their tea. They sometimes look like they are going to buy food, then change their minds.

Discuss these answers in your group:

1. What business does Rukmani own?
2. What is the difference that she has noticed?
3. What's the problem?
4. What does Rukmani want to do?
5. What ideas do you have about what Rukmani should do to improve her business?

Activity 9b: Roleplay - Mirroring and Body Language

This case involves Rukmani, Coach Damith and Coach Jeewana. Rukmani is having a business problem these days and she goes to talk to two coaches:

1. Coach Damith
2. Coach Jeewana

Which coach does Rukmani like better? Why?

Activity 9c: Do's and Don'ts of Body Language

Circle the good ideas:

- | | | |
|-------------------------------------|---------------------------------------------------------------------|------------------------------------------|
| Maintain eye contact | Purse your lips | Pay attention to your facial expressions |
| Cross your arms | Clench your jaw | Physically turn away |
| Smile often | Roll your eyes | Sit facing your client |
| Mirror your client's body language | Be aware of your unconscious habits | |
| Use hand gestures | Nod affirmatively and make small gestures to show you are listening | |
| Tap the table with your pen or foot | Frequently shift your position or fidget | |
| Yawn or let your eyes wander | Lean into the conversation to show engagement | |

Key points:

- Body language is not an exact science, so be careful of jumping to conclusions.
- Sitting with their arms crossed may not be a sign of defensiveness, it can also mean the client wants to feel more secure, needs to physically support themselves because they are tired, feels cold, or it may simply be their normal way of sitting.
- As a coach, you need to consider your own body language and pay attention to the signs your client may be receiving.
- Being aware of your client's non-verbal communication will help you become a better listener and enhance your coaching relationship.
- Go to <https://coachingandthejourney.wordpress.com> for more on mirroring

ACTIVITY 10**Questioning Skills****Time: 30 minutes**

Aim: By the end of this activity you will be able to distinguish between the different types of questions and their value in coaching.

Activity 10a: The Importance of Questions in Coaching

Discuss the answers to the following questions with your partner:

1. What is the difference between these two questions? Which one would bring about more information from the responder?
 - a. Did you have a good day today?
 - b. What was the best part of your day?
2. Why are questions important in coaching?

Activity 10b: Question Types

1. Work with your group to make a list of the different types of questions. Write them down in the space below:

2. Your trainer will give you some cut-ups of seven question types, their examples, their strengths and weaknesses. Organise them into categories of each question type.

3. Now that you have looked at the different types of questions, discuss in your groups the following questions:

- A. Which questions would be most valuable for a coach in a coaching scenario?
- B. Which questions should generally be used within limits?
- C. What are the typical traps that inexperienced coaches could fall into while doing the coaching exercise?

Key points:

- ✦ A key communication skill as a coach is asking the right questions.
- ✦ Sometimes you may ask a leading question unconsciously.
- ✦ But don't worry as you will develop more control over your words as your coaching practise advances.

ACTIVITY 11

Final Role-play

Time: 45 minutes

Aim: By the end of this activity participants will have practised their communication skills and questioning skills in a role-play.

You will work in groups of four A, B, C and D. There will be four role-plays: in each role-play, one person out of the A, B, C, D group will play the client. There will be four client characters that each person will play in each role-play. Your trainer will give you more information.



<p>Roleplay 1:</p> <p>A is Client Rukmani B is Coach C observes B on communication skills D observes B on questioning skills</p>	<p>Role Play 2:</p> <p>A is Coach B is Client Asela C observes A on questioning skills D observes A on communication skills</p>
<p>Role Play 3:</p> <p>A observes C on communication skills B observes C on questioning skills C is Coach D is Client Maria</p>	<p>Role Play 4:</p> <p>A observes D on questioning skills B observes D on communication skills C is Client Ajith D is Coach</p>

Module 7

Building Successful Relationships



5 hours 30 minutes



Module Aims: By the end of this module, you will be able to...

1. Identify the steps needed to develop a mutually beneficial coaching relationship.
2. Articulate the actions and behaviour needed to establish trust and create rapport with a client.
3. Recognise the importance of active listening in a coaching relationship and describe the appropriate language and behaviour needed to respond with empathy.
4. Recognise the importance of empathy in a coaching relationship and describe the appropriate language and behaviour needed to respond with empathy.
5. Specify the key content requirements of a coaching contract.
6. Define the roles and responsibilities of a client and a coach.

Module 7:

Building Successful Relationships

ACTIVITY 01

Putting Yourself in the Client's Shoes

Time: 25 minutes

By the end of this activity you will have thought about what the client might be expecting from your coaching session.

Activity 1a: The Situation

Read the situation and answer the following questions:

Your name is Ranjit. You are 40 years old and you live in Valaichennai, a town very close to the popular tourist destination of Pasikudah. You finished your O levels, then worked with your father in a bakery and now have started a new ice-cream shop. It was a success for a few years but recently you find that your customers have dwindled.

You are having problems growing your business and especially in attracting tourists to your shop.

You have been given an opportunity to work with a business coach to help you find ways of improving your business.

You think this is a very good chance and are hoping to get some good ideas and advice from this coach. But at the same time, you don't have too much time to waste as you have a business to run.

You are not familiar with the coaching mode of learning. Your learning has been mainly in the form of a local high school when you were young. The learner teacher relationship was very formal and distant where the teacher is the authority and gives necessary information and the student follows. Teachers are often worshipped to show respect. Asking questions and thinking out of the box has not been encouraged in your school and it can be seen as disrespect.

Questions to answer:

1. What and where is Ranjit's business?
2. What is his problem?
3. What is his educational background?



Activity 1b: The Client's Expectations of the Coach and the Coaching Process

If you were Ranjit, then what would your expectations be about this coaching session and of the coach? Discuss with your partner and fill in the second column. Don't look at the third column at this point. For example, what kind of coaching style would you expect the coach to have? Would you expect your coach to give you all the answers?

Elements of coaching	Your expectations	How will the coach manage these needs?
1. Length and time frame		
2. Ability and background of the coach		
3. Gender and age of the coach		
4. Style of delivery		
5. The coach's role and involvement		
6. Your involvement in the coaching session		
7. The process of coaching		

Key points:

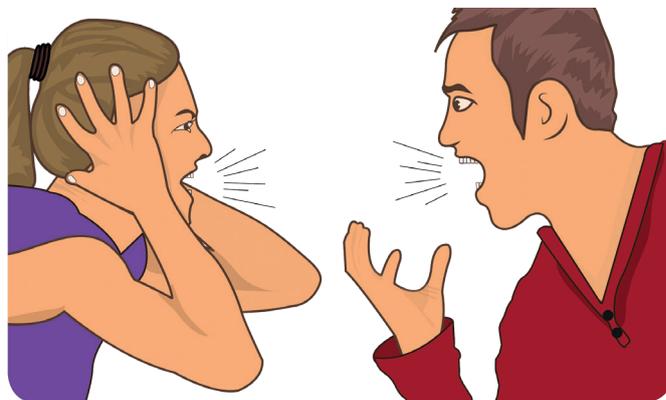
- ✦ Setting expectations involves finding out what the client expects, and letting them know exactly what you will (and won't) be providing.
- ✦ It is an opportunity to clear up any misunderstandings before you start and to avoid potentially having an unhappy client later on.
- ✦ Setting clear expectations doesn't stop you from over-delivering. You can always give the client more than they expect if you want to.
- ✦ But be sure not to agree to something that you cannot deliver.

ACTIVITY 02**Building Rapport****Time: 60 minutes**

By the end of this activity you will have been introduced to the concept of rapport building in coaching.

Activity 2a: What is Rapport?

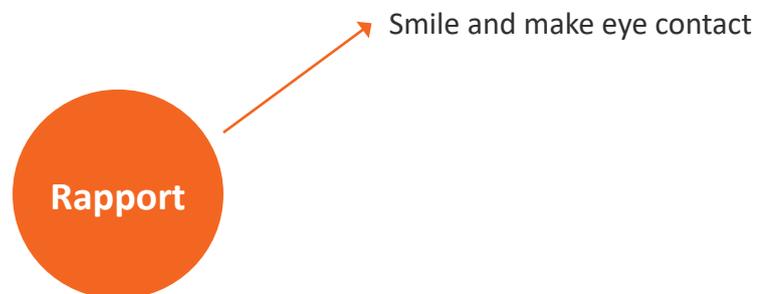
Look at the photos below. Which do you think are examples of good or bad connection between people?



How would you describe 'rapport'? Discuss in groups.

Activity 2b: Recall - Communication Skills and Building Rapport

Recall what you have already learnt in the previous module on communication skills and think of things a coach will need to do to create and build rapport with their client:



Activity 2c: Practising Rapport

This exercise is an opportunity for you to practise your rapport skills with any two people in your class. You will be working with a partner who will be observing you and giving you constructive feedback each time after you have finished talking. In the first round, you will talk for two minutes, then in the second round, you will be talking for five minutes. You will be talking about the topics which are given in the table below:

Speaker A Card 1	Speaker A Card 2	Speaker B Card 3	Speaker B Card 4
Your home / your hometown	Education	Hobbies	Your plans / aims and goals
2 minutes	5 minutes	2 minutes	5 minutes

Post Activity Reflection: Afterwards, reflect on the exercise. Did you find it harder to create conversation and maintain rapport as your turn became longer? Did you speak too much or too little? Did you get some feedback from your partner? If some participants found the task difficult, what advice would you give them? Discuss answers to these in your groups.

ACTIVITY 03

First-Day Steps

Time: 60 minutes

By the end of this activity you will have identified the coaching steps and behaviour needed for the first-day meeting with the client in order to develop a solid foundation for a mutually beneficial coaching relationship.



Activity 3a: Establishing Trust

The last activity focussed on creating rapport. Now we will think about developing and building trust. Discuss in your groups the answers to a and b:

1. What is trust?
2. Why is it important to build trust in client relationships? Why is it important for a coach?

Activity 3b: How to Build Trust

Here are some key behaviours to build trust in a relationship. Fill in the gaps:

1. Be sincere and h_____t
2. Be t____ to your words
3. Demonstrate c_____ce
4. C_____te effectively
5. Don't make pr _____ s you can't keep
6. Maintain con_____lity
7. Admit m_st____es

Activity 3c: First-Day Steps

Let's think about the steps which you may need to take as a coach on the first day in order to build rapport and create an atmosphere of trust and respect. Talk in your groups to discuss what steps will be needed.

Your trainer will give you some steps. In your groups work to arrange them into the most logical order.

Activity 3d: Managing Client Expectations

Go back to Activity 1b and fill in the third column. Work with a partner and write down some ideas about how a coach can manage those client expectations.



Key points:

The Client needs to trust:

1. That the information they provide will be treated with the strictest confidence
2. That the coach is competent and that they can follow their guidance

The Coach needs to trust:

1. That the client is serious about engaging with the coaching process
2. That the client is providing honest and accurate information
3. In their own coaching skills
4. In the coaching process

ACTIVITY 05

Demonstrating Empathy

Time: 1 hour 20 minutes

By the end of this activity you will have recognised the importance of empathy in a coaching relationship and identified the appropriate language and behaviour needed to respond with empathy.



Activity 5a: Role-Play

Work in a team of four to act out this short sketch or drama. Three of you can be the actors and one person can be in charge of directions for the short play. The script and situation are given below:

Situation: Keerthi is a fisherman in Talalla. It was 2004 and the Tsunami hit the coast of Tallalla and Keerthi had lost his boats. He had three fishing boats and a good business in catching fish. Now he has nothing. All three boats are gone. His favourite boat was Subhaa. Luckily his house has survived but is damaged and he has lost all his furniture and other household equipment. He has a wife, daughter and a son. All three survived as they ran up the nearby hill.

A week has passed and Keerthi meets his close friends, Laal and Chaminda who he often does fish business within Colombo. Laal and Chaminda both care about Keerthi. So they have come down to Talalla to visit Keerthi.

Script for Role-play

Three characters

- Keerthi:** The Fisherman from Talalla, in the South of SriLanka
- Laal:** Keerthi's business associate and good friend from Colombo
- Chaminda:** Keerthi's business associate and good friend from Colombo

Laal: Anay Machaan hope you are okay? How is the situation? I heard the Tsunami has hit you really bad!

(Lal wants to cheer Keerthi up, so he smiles and wants to appear upbeat so that Keerthi can get some relief by diverting his attention to something more cheerful. Laal feels that if he appears sad then Keerthi will feel worse. So he is trying to divert Keerthi's attention to something else)

Keerthi: Yeah Machaan, I have lost all my boats - I worked 20 years and then took a loan to buy these boats and now there is nothing. I really don't know what I have done wrong in this life.

Laal: "Anay Machaan, come on now.....don't feel so bad. At least you didn't lose your life. Look at you. You are okay and your wife and kids are okay. Try to stay positive. Look on the bright side of things. There's always a reason why things happen. Maybe there is something better which is meant for you. Be patient. Things will be fine. We can fix this together. There's a lot of help around. We will find a way out of this okay! Don't worry!"

Okay, come on Keerthi cheer up, look what I brought for you, your favourite dessert: Kalu Dodol. Come on, things will come around, we just have to take things one day at a time. We are here to help you. So, for now, let's just think of something else, how about this, there's a really nice movie going on at the cinema in Matara. Come on it'll take your mind off the problem for the moment. We can also go and eat at your favourite restaurant The Happy Lotus in Matara. Let's go and have an arrack and coke together. Let's not think about this now and come back to it tomorrow. Come on let's go!"

Keerthi: "Thanks Machaan. That's really nice of you to come down all the way from Colombo and to see me but I really don't feel like it". (Keerthi looks depressed, sad and looks down).

Laal: "Hey I know what you mean Machaan but think of it this way. At least the loss was only things..... At least you are not injured and at least your wife and kids are okay right. Come on cheer up now! Many people have had it worse. There are people who have lost their families also."

Keerthi: "Umm... Hmm...yeah I know ... I know .. what you mean."

(Chaminda looks at Keerthi who is so sad and is looking away into the sea. Chaminda sits next to Keerthi and mirrors Keerthi's body language and looks down and mirrors his tone of voice which expresses sadness and understanding)

Chaminda: "Keerthi Machaan, I'm so sorry about the Tsunami. I don't even know what to say. I mean ... It took away 20 years of your hard work in one shot. It took away all your dreams and everything you had worked so hard for."

Laal: "Chaminda what are you doing? What is wrong with you? ..ayyo Machaan, don't make him feel worse than he already does".

Chaminda looks at Laal and lowers his gaze again and says "I'm so sorry.... Machaan."

Keerthi: "Having my own boat was my dream. I would sail out to the sea in my own boat at the crack of dawn and there was no feeling like it."

Chaminda: "I bet you had great adventures on the sea on your boat and must have felt so proud to have achieved that."

Keerthi: "Yes, especially my first boat. I called it Subhaa, it's a hindi word for morning. I painted it in bright colours so that it would stand out from the others."

Chaminda: “Yeah I’m sure it stood out in the crowd. I bet the tourists admired it too.”

Keerthi: “Oh yes, my boat Subhaa was my pride. In the late mornings and afternoons, I used to take tourists on it for a snorkelling trip around the coastline. The tourists loved it. I have many pictures of it too.”

Chaminda: “Yeah I would like to see those pictures sometime. I know what you mean, it wasn’t just a business, Subhaa was more like a person to you. It’s so sad. I understand machaan. It can’t be easy.”
(Chaminda puts his hand on Keerthi’s knee to show understanding)

Keerthi starts to cry and leans on Chaminda. Then he wipes his tears quickly and says: “Thank you Machaan..... I’m okay I’m okay now. I feel better. Okay let’s go to the Happy Lotus and I’ll show you some pictures of Subhaa.

Activity 5b: Analysis Questions

Discuss in your groups the following questions:

1. Laal and Chaminda reacted differently to Keerthi’s situation? How did this make Keerthi feel? How do you think their reactions affected Keerthi?

2. Why doesn’t Keerthi want to eat Kalu Dodol and go to the cinema?

3. Which person was giving suggestions as to what should be done and how Keerthi should feel in this situation?

4. There is a saying in English that says “every cloud has a silver lining” which means that every negative situation has the potential to result in, or produce, something positive or beneficial. There is always a good reason why bad things happen. People often use this when something unfortunate happens. Which person was “silver lining” the cloud? What is silver-lining? How do you think it makes Keerthi feel? Is it a good technique to use with someone who is going through extreme pain?

5. Which person was displaying sympathy to Keerthi’s situation?

6. Which person was displaying empathy?

7. What makes empathy different from sympathy?

8. Do you think empathy can be conveyed in a happy situation as well or is it only for stressful situations?

Activity 5c: Empathy vs Sympathy

Fill in the gaps in the following descriptions of empathy and sympathy. Use E for empathy and S for sympathy:

1. _____ creates connection between people.
2. _____ expresses disconnection.
3. _____ requires putting yourself in the distressed person's shoes.
4. _____ is the ability to understand and share the feelings of another.
5. _____ says that you understand and feel sorry for the person but you don't connect with their pain.
6. _____ says that you feel and connect with the distressed person's pain.
7. _____ does not 'silverline' a bad situation.
8. A person who responds with _____ will withhold giving judgments or how to fix the situation advice.
9. A person who responds with _____ does not 'silver-line' the bad situation because that can seem like undermining someone's pain and ignoring it.

Activity 5d: Four Stages of Empathy

Put these four stages suggested by Dr Brene Brown in the right order:

- a. Staying out of judgement and listening
- b. Communicating that you can recognise that emotion
- c. Recognising emotion in the other person that maybe you have felt before
- d. Perspective-taking, or putting yourself in someone else's shoes

Activity 5e: Practising Empathy

Below are interactions between A and B. Can you improve on B's responses and make them more empathetic. You can consult the expressions in the box. Work in pairs:

Responding to Bad news	Responding to Good news
I can see how important this is for you	Hey, that's such great news...
I'm so sorry to hear that... I know this can be frustrating	Wow, fantastic!
I'm so sorry... I don't even know what to say.	Hey, excellent! I'm so glad to hear that!
I don't even know where to begin...	Wow! That's massive, you must be so excited!
I know this process can be confusing...	Fabulous! How do you feel about it?
Is there something I can do to help...	Super news... now you owe me a treat!
I'm so sorry to see you in this position...	
I'd like to help you if I can...	
This is so sad, I know what you mean...	
I understand how you feel...	
I know how you are feeling and you are not alone in this.	

Improve the responses to these situations

- A: I just lost 3 boats to the Tsunami
B: At least you are still alive
- A: I just had a miscarriage
B: Well, at least you know that you can get pregnant. You can try again.
- A: just lost my uncle to covid. He was 85.
B: Well, at least you know he lived a full life. Everybody has to die sometime.
- A: Because of the COVID situation, there are no tourists in the area and now I have to sell my hotel to pay off the loans.
B: Well, at least it's only your hotel and not your personal house.

5. A: My wife just left me. I am devastated.
B: Well at least you were married and at least you have children.
6. A: I feel dissatisfied in my work.
B: At least you have a job.
7. A: I'm so upset... I failed my exam.
B: Well I told you... you should have worked harder.
8. A: My company has shown a growth of 20% in net profits
B: Okay.
9. A: I just found out that I've won the national lottery, I won Rs. 2,000,000
B: Oh that's good.
10. A: The manager of my hotel stole all my money. I got swindled for Rs. 50,000,000
B: Oh no.. this is horrible news. How do you feel?

Activity 5f: Coaching and Empathy

1. Discuss what is the importance of empathy in the workplace?
2. Why do coaches need this skill?

Key points:

- ✦ Empathy is a central part of emotional intelligence.
- ✦ Empathy is an important skill to nurture if you want to connect deeply with your clients, and people in general.
- ✦ Some people are naturally more empathetic than others, but empathy is a skill you can learn and improve through practice.

ACTIVITY 06

The Coaching Agreement

Time: 25 minutes

By the end of this activity, you will be able to specify the key content requirements of a coaching contract.

Activity 6a: Analysis of Coaching Agreements

Your trainer will give you four samples of coaching agreements. Go through the four agreements and complete the table below:

	A	B	C	D
1. Confidentiality and privacy clause				
2. Exceptions to confidentiality				
3. Description of coaching and the coaching relationship				
4. The specifications of the coaching procedure				
5. Session cancellation procedure				
6. Termination clause				
7. Coaching Fees				
8. Specifications of the role and responsibilities of the client and the coach				
9. Details of professional practice				
10. Description of the coaching commitment.				

Activity 6b: Discussion - Coaching Agreements

Discuss with your partner the answers to the following questions:

A. Why do you think a coaching agreement is needed?

B. Do you think all coaches use the same standard agreements?

C. Why may one agreement be different from another?

D. What are the important sections which you think must be included in a coaching agreement?

Key points:

Setting clear expectations:

- ✦ Involves finding out what the client expects.
- ✦ Involves letting them know exactly what you will (and won't) be providing.
- ✦ Allows you to clear up any misunderstandings before you start.
- ✦ Helps to avoid potentially unhappy clients later on.
- ✦ Doesn't stop you from over delivering - you can always give the client more than they expect if you want to. But be sure not to agree to something that you cannot deliver.

ACTIVITY 07

Role Play - First Meeting With the Client

Time: 60 minutes

By the end of this activity you will have used the information from the previous activities to practice your first-day meeting with your client.

Activity 7a: The Situation

Participant A and C. Read your profile:

Name of your business	Maala's Rest
Type of business	Guest House
No. of years in operation	Five years
No. of employees	Two cleaners and her two children
Problem	<p>Maala started her business in December 2017 based on her own interest to earn additional money to support her family. Her husband is a tourist guide in Anuradhapura and both her children and husband helped her set up her Guest House. Her husband provided her with the basic knowledge of the tourism industry and that helped to get an understanding of how to run her Guest House. She has five AC rooms under the name of Maala Rest and solely depends on the online booking portals for reservations and she earns an average income of 50,000 LKR per month.</p> <p>Maala realises that she is not going to develop or sustain her Guest House with the way things are and she is looking for ways to improve her business. She feels that her guest house is located in the outskirts of a well-known city, Anuradhapura, but she is finding it difficult to promote her guest house to tourists. She feels that she doesn't feel very confident when speaking with tourists or foreigners.</p>
Goals	<p>She would like to build her skills in customer service and also would like to find ways in which she can offer something unique to her customers. She also feels she can improve in marketing her guesthouse to attract foreign tourists.</p>

Activity 7b: Preparation for Coaching

Work with your assigned partner to prepare for your first-day coaching session:

- ✦ A work with C
- ✦ B work with D

Go through the steps outlined in Activity 3 and think about the questions you would like to ask the client. Think about what you will say to the client to make them comfortable, develop rapport and trust on the first day of your coaching. Keep in mind the stages and process of the Blended Coaching Model which you have looked at before. You will need to explain to the client how it will work. Have a look at the profile of your client because this will help you to design your questions:

- ✦ A and C look at Mary's Beauty Salon
- ✦ B and D look at Maala's Rest

Practice delivering the session with your partner.

Activity 7c: First Day Role-Play

After you are finished practising, your trainer will put you into new groups:

- ✦ A work with B
- ✦ C work with D

There will be two role plays:

First Role-play:

- ✦ A is the coach and B is Mary, the client who runs Mary's Beauty Salon.
- ✦ C and D will act as observers and use the Observer Tick Box Tool given below to observe the coach. They will use this observer's tool to help give feedback to A, the coach after the role-play is over.

Second Role-play:

- ◊ D is the coach and C is Maala, the owner of Maala's Rest.
- ◊ A and B will act as observers and use the Observer Tick Box Tool given below to observe the coach. They will use this observer's tool to help give feedback to D, the coach after the role-play is over.

Observer Tick Box Tool

Did the Coach:	✘ / ✔	Comments
1. Seem warm, friendly, and approachable.		
2. Display correct body signals that suggested interest eg. leaning the body forward at an angle to show interest.		
3. Smile when required.		
4. Nod the head in acknowledgement.		
5. Convey interest through facial expressions.		
6. Back-channel (non-verbal) to the speaker to signal comprehension, eg. umm.. hmm, aaahaa, etc.		
7. Back-channel (verbal) to the speaker to signal comprehension, eg. I see, oh no, okay, so then, next, alright, etc.		
8. Ask questions to clarify the message.		
9. Ask questions about the conversation to elicit more information.		
10. Paraphrase what the speaker said in other words in order to check if they have understood the message.		
11. Use warm and consistent eye contact with the client.		
12. Use mirroring.		
13. Explain clearly the process and steps of coaching, using the blended coaching model.		
14. Did the coach ask questions to make sure the client is understood.		
15. Explain the roles of the coach and client as part of the agreement.		

Did the Coach:	✘ / ✔	Comments
16. Talk about confidentiality.		
17. Explain the agreement and what it entails.		
18. Work with the client to come to an agreement on the specific terms of the agreement.		
Did the Client:		
1. Appear comfortable.		
2. Seems to engage with the coach and ask questions etc.		
3. Demonstrate understanding the process and stages of the blended coaching model.		

Key points:

Setting clear expectations:

- ✦ As you progress in your coaching career, regularly reassess your boundaries.
- ✦ New experiences may cause you to reconsider certain aspects.
- ✦ Look at your client relationship and consider what is not working.
- ✦ Then create new boundaries where needed - you can choose to add these into your agreement or not.
- ✦ Remember to share what these are with your clients.

Module 8

Key Performance Indicators



3 hours 05 minutes



Module Aims: By the end of this module, participants will be able to...

1. Select and adapt from a selection of existing KPIs.
2. Create new KPIs suited to analysing and monitoring the needs of their clients.

Module 8:

Key Performance Indicators

ACTIVITY 01

Acronyms (or 'Letter Soup')

Time: 15 minutes

By the end of this activity you will have revised the meaning of some important acronyms used in this module.

What do the letters BBC mean? British Broadcasting Corporation. What about CEB, or SLT? These are acronyms.

The trainer will put you in groups and give each group a handout, with acronyms from this course. What do they mean? Write your answers, and see which group gets all the answers correct first; they are the winners. (They only win the honour of being first.)

ACTIVITY 02

Adapting KPIs

Time: 30 minutes

By the end of this activity you will have practised adapting KPIs.

In Module 3 - The Coaching Model, you were introduced to KPIs developed by S4IG for tourism and hospitality.

These are divided into Operational Performance Indicators (OPIs), connected to product, premises, systems, services and marketing, and Business and Employment Indicators (BEIs), which cover business aspects such as having a bank account or not, and levels of activity and income, and employment aspects, such as staff numbers, and diversity among staff.

These Indicators are available at <http://bit.ly/S4IG-kpis>. As a coach you could use them:

- ◊ As they are, if any of them you find to be a good fit to your client's business.
- ◊ After adaptation, so that they better fit the exact needs of your client's business.
- ◊ For inspiration. Just browse through to consider areas that could benefit from the analysis provided by Indicators.

In this activity we will have further practice in adapting pre-existing KPIs to a client’s needs. In the next activities we will spend much more time working with tailored KPIs.

Consider the following two KPIs, both taken from the ‘hospitality’ set, and the description of your client’s business. Discuss in your group how the KPIs could be adapted to better suit your client’s needs.

1. This is an OPI concerned with premises (which, in accommodation, is part of the product).

OPI6	Facilities are accessible for persons with disabilities. The site, buildings, rooms and bathrooms are accessible for a person in a wheelchair.			
1. Basic	2. Progressive	3. Standard	4. Good	5. Very Good
no accessibility awareness	no accessibility consideration	main building and toilet are accessible but not rooms	main building and toilet are accessible and some rooms and bathrooms	fully accessible

Your client has just bought a two-storey hotel. There is no lift access to the upstairs floor, only stairs. The client is aware of the issue and has made one of the ground floor toilets wheelchair accessible, and one of the four bedrooms downstairs. The site is hard to access, though, mainly due to the state of the pavement outside, and the steps into the building.

Do you need to adapt this OPI? Where would you place the hotel currently (on this scale or your adapted one), and what grading can the client realistically aim to achieve?

2. This is a BEI concerned with business performance:

BEI12: Average room occupancy ratio for last quarter.

Your client is the same hotel owner. His hotel is near Trincomalee, and although there are business travellers all year round, the tourist market is important to this business but highly seasonal. Quarter 1 (Jan-March) is always his quietest quarter. Comparing a quarter to the one before or the one after doesn’t give a useful picture as it does not compare like with like. Would it be better to adapt this BEI, or leave it unchanged?

Key points:

- Don’t reinvent the wheel! Do look to see if there is a wheel that fits, and consider the KPIs already developed for the industry.
- Do be prepared to adapt these to the particular needs of your client. Don’t think that ‘one size fits all’.

ACTIVITY 03**The Purpose of KPIs****Time: 20 minutes**

By the end of the activity you will have cemented your understanding of KPIs.

You have studied KPIs in Module 3 - The Coaching Model, as well as further study today in this module. We are going to move to some case studies, with data, where you will be working out KPIs; new ones, not ones based on OPIs or BEIs. Before we do this, we will make sure we all have a firm understanding of what KPIs are, and what they are for. In groups of three, work through these questions:

1. What does the acronym KPI stand for?

2. What, fundamentally, is a KPI?

3. What areas of business activity can be measured by use of KPIs?

4. Why is it useful to measure change with KPIs?

5. Do you have to use the same KPIs over a long period?

ACTIVITY 04**Case Studies****Time: 40 minutes**

By the end of the activity you will have considered a case study, and have initial thoughts as to what aspect of business performance should be measured.

There are three case studies. Your trainer will put you in three groups and give one case study to each group. Read your case study and make some notes in the box below it in answer to the question in the final paragraph. Make your notes in the box below the text.

Case Study 1: Jagarth

Jagarth, your client, is a safari jeep driver in a small park near Pottuvil. Jagarth is also a keen surfer and spends his free time in the season doing this. He knows just how many tourists come to and from Arugam Bay, but how few of them come to the park for a safari trip. This is a great shame as there are always elephants to see, and lots of crocodiles, and eagles. He is quite an expert on birds, too, loving the pied kingfisher above all others.



The problem is that the park is not well known, like Yala or Udawalawe, and does not have a great reputation. There aren't many safari jeeps, but the number is still too many for current demand. As a result, the drivers compete too openly, driving the price down, and therefore hurrying round the park in only two hours, maximum. Reviews on the internet reflect this, as the park fees themselves are high, so customers feel they are not getting value for money or being treated well. From October to April there is almost no business anyway, as everyone surfs on the south coast.

Jagarth has a vision. He is trying to start a drivers' collective. He would like to see standard pricing, a standard drive time, and an experience and marketing very much aimed at surfers. In this vision, a portion of the payment for each safari trip will be set aside in a pot to be used for two things; marketing the collective to surfers in 'A Bay' and providing some income to the drivers in the quiet months.

Another concern of Kapila's is the pricing. As is fairly standard there is differential pricing, with low season (\$500 per villa per night), mid-season (\$600 per villa per night) and peak season (\$750 per villa per night). But Laurie also pushes for last-minute deals to bring more business in, especially in the low season. He has asked Kapila to offer the villas for as little as \$150 per night in last-minute deal offers.

Kapila worries that letting at such low rates may actually lose money. After all, the food and beverages do not really contribute, as the villas are not licensed and meals are done at cost of ingredients plus 10% to cover the cost of cooking.

What do you think Kapila should investigate? What data will he need to do this?

Case Study 3: Gajnan and Lakshana

Gajnan and Lakshana (your clients) run a homestay business near Ampara. Gajnan works as a mechanic, so it is his wife, Lakshana, who does most of the business, with help from a neighbour if needed. They have built three cabanas in their garden for visitors. This has taken up about 50% of the garden. Each cabana has a veranda in front, where meals are served. There is no common space for guests to meet, and no information about activities, though Gajnan has binoculars he is happy to lend. There are national parks (including Gal Oya) and bird sanctuaries, and some interesting old temples (including Rajagala) in their area; plenty to occupy a few days for the unhurried visitor.



ACTIVITY 04**Using Data to Measure Performance with KPIs****Time: 50 minutes**

By the end of the activity you will have used data to track performance overtime in one of the case studies already considered and use the resulting Key Performance Indicators to understand trends in business performance.



Your trainer will divide the class into three groups, and give each group a paper with information, and questions. One group will be looking at Jagarth's safari business, one group will be looking at one of the villas that Kapila manages, and the third group will be looking at Gajnan and Lakshana's homestay business. You have 25 minutes to answer the questions.

Then your trainer will give you a second set of information and questions, for a year later (in the case of Kapila and of Gajnan and Lakshana) or the following four week period (in Kapila's case). This time you have 20 minutes.

ACTIVITY 05

KPI Summary

Time: 30 minutes

By the end of the activity you will have compared your work on KPIs with members of the other groups, and come to conclusions about the usefulness of KPIs.

Now you will form new groups, and each new group will have someone who studied Jagarth's situation, someone who studied Kapila's situation and someone who studied Gajnan and Lakshana's situation.

In the new groups, briefly (only 10 minutes) summarise what KPIs you have worked on, and how these have been relevant to helping your client.

Then, with your group mates, make a poster under the title 'The Usefulness of KPIs'. You could use bullet points, or a mind map, or some other form of presentation. Be quick, you only have 10 minutes.

Display your poster, and study those of the other groups.

Key points:

- › A well designed KPI gives useful management information that really helps understand business performance.
- › KPIs can be used in any business area, not only finance. They could be to do with customer feedback, for example, or customer loyalty (e.g. levels of repeat business for a salon)

Module 9

Business Coaching in Practice



5 hours 30 mins



Module Aims: By the end of this module, you will be able to...

1. Use a set of forms for business coaching appropriately to guide your clients through a structured and transparent process.
2. Use KPIs to monitor a business' progress.
3. Include training and exposure visits in the development of a business.
4. Use the fishbone analysis to understand and advance business development.

Module 9:

Business Coaching in Practice

ACTIVITY 01

The Coaching Journey and Blended Coaching, a Reminder

Time: 20 minutes

By the end of this activity you will have recalled the Coaching Journey and the Blended Coaching model and considered the differences between them.

Question 1

Work in groups. The trainer will give you a set of cards to put in order. This will revise the Coaching Journey that was covered in Module Two. We will be going through various stages of this journey today.

Question 2

In your groups, double-check you have the ten steps of the Coaching Journey in the correct order. Number the steps 1-10 correctly.

Below is a basic outline of the Blended Coaching model that was covered in Module Three. A 'before' stage and an 'after' stage have been added. Discuss with your group-members where the stages of the Coaching Journey might correspond with the stages of the Blended Coaching model.

Write the numbers of the relevant Coaching Journey stages in the column on the right. If you think some stages apply to more than one part of the Blended Coaching model, you can write their numbers in more than one place.

The Blended Coaching Model		
Stage	What the coach does at this stage	Corresponding stages of the Coaching Journey?
Before		
Stage 1	Conduct operational performance evaluation to understand the client's business	
Stage 2	Agree goals and measurement tools	
	Create an action plan	
Stage 3	Carry out ongoing performance monitoring	
	Give ongoing feedback	
After		

ACTIVITY 02

The Basic Information Form and Researching Your Client

Time: 50 minutes

By the end of this activity you will have understood the use of research in learning about your clients' businesses, and will have learnt how to capture this information on a form.

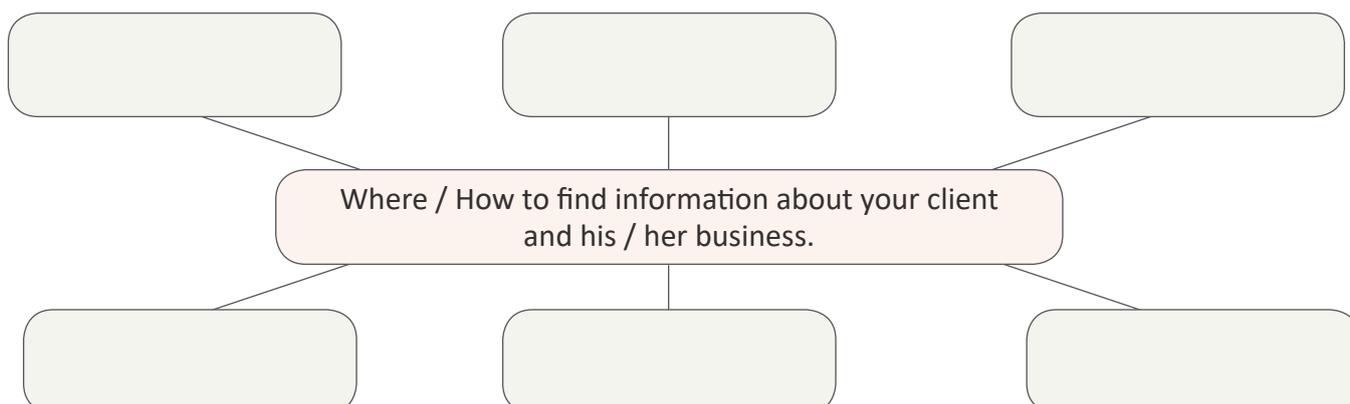


Activity 2a: Researching a Client

Question 1

The main source of information about your client will be from your client, him or herself, naturally. We will look at this in Activity 3.

But, apart from your client, what could be your sources of information about the client and his/her business? In groups, brainstorm and build up a mind map with as much detail as possible.



ACTIVITY 03

The Client's Basic Information

Time: 45 minutes

By the end of this activity you will have become familiar with and practised using the Basic Information Form and, through this, further practised relationship building.

Activity 3a: Familiarisation with the Form

You have looked at Part Two of the Basic Information Form. Now it's time for Part One. Remember, the two parts can be done in either order, but if you start with the research, hopefully you'll have some positive things to say to the client, to help get the relationship off to a positive start.

This is an exercise in collecting very basic information, and so it is probably not worth a trip to do face to face. It is best done, usually, over the phone or, better perhaps, by video link (Zoom / WhatsApp / Messenger / Skype, etc).

Look at the form your trainer gives you, with your partner, and fill in the information that you already know. Please note, the form is designed to be typed into, so the information boxes will of course expand as you write more. Please also note that the original form has a little more information on training received, which we are not going to think about just yet.

Activity 3b: Preparation for First Direct Contact

Half the class will keep the form, and prepare for the first direct contact with Kannan of Singing Fish. You have 10 minutes to prepare. Think about (and make notes):

1. How will you start the meeting, to set a friendly yet productive relationship?
2. What can you say to show that you are batting on the same side as the client?
3. Will you mention any of the problems/issues that you have come across on the internet?
4. If Kannan is reluctant to give any details in any area, will you push him to open up?
5. Do you expect to get a full understanding of the business from this call?
6. How will you end the call?

Half the class will be Kannan. The trainer will give you a role card, with information about Kannan and his business. Think about (and make notes):

1. How do you feel about this meeting? How will this come out in your manner on the call?
2. How do you, as Kannan, feel about your business, the Singing Fish? How will this make you behave in the call?
3. Is there any information here that you would not feel so comfortable talking about?
4. Are you worried about any questions the coach may ask?
5. Is there any information you are especially anxious to communicate?
6. What is it you hope to get out of the coaching relationship?

Question 3

Now you will have the call. The trainer will match up pairs, one coach with one Kannan. You have only 10 minutes, so you will not be able to cover the whole form. Focus on establishing the relationship as you work together to fill the form. When your trainer tells you to sign off, imagine that you have got all the information needed, and so it is time to end the call.

Key points:

- ✦ Your going prepared for your first visit will give your client more confidence.
- ✦ Do internet research, and find things to praise your client about.
- ✦ Get more information, basic information, through a phone or video call so the ice is broken before you actually meet.

ACTIVITY 04**The Baseline Profile Form**

Time: 1 hour 15 minutes

By the end of the activity you will have practised using OPIs (with their scales) & BEIs through a role play activity.

Activity 4a: Introduction to Baseline Profile Form

The Baseline Profile Form is a tool to help you and the client understand just where the business is at the start of the coaching. By looking at all aspects of the business you will be able to see, together, which aspects could be worked on to make an overall improvement. And, at the end of the coaching relationship, you can use the form again to see just how far the business has progressed. If it is a long relationship, say two years, you may like to use it at the end of each year.

Your Trainer will now introduce you to the form. As this happens, record what the six categories for OPIs are:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Each OPI is scored on a scale from 0 to 5. You came across these in Module 3; can you remember them?

0. not applicable..... 1. _____ 2. _____
3. _____ 4. _____ 5. _____

Now look at the sample OPIs and see if you were right.

N.B. All the forms, OPIs, scales for scoring OPIs, and BEIs for various tourism/hospitality activities are available at <http://bit.ly/S4IG-kpis>

Activity 4b: Preparing for the First Visit Role Play



Your trainer will give you a role card. Half of you will be yourselves, i.e. the coach in the role play. The other half will be Kannan. Read the role card and follow the instructions to prepare for the role play.

Activity 4c: Role Play

Your trainer will match you in pairs. Spend 5 minutes setting the tone and laying the foundation. Then quickly move to business, focusing on the areas you have been preparing for. Discuss the issues, agree on the scoring on the Baseline Profile Form for these areas, and fill that in.

After the role play, join another pair and compare your outcomes.

ACTIVITY 05

Tracking KPIs

Time: 30 minutes

By the end of this activity, you will have recalled that KPIs can measure performance in any area of business and will be able to use the KPI Tracking Form accordingly.

Activity 5a: Identifying KPIs

We have in previous units looked at OPIs (mostly on a 0 - 6 scale) and BEIs (some are Yes / No, some ask for a raw number, and some a percentage or ranking). We have looked at using the ones available at <http://bit.ly/S4IG-kpis> as they are, or adapting them. We have also looked at writing new, client-specific KPIs.

Here are the same six areas we have seen in the Baseline Profile Form:

1. Product (including building and site)	
2. Marketing	
3. Operations / Systems	
4. Human Resources Management	
5. Environmental Sustainability	
6. Other	

Key points:

- ✦ If your client's business is very informal, it may be more difficult to collate the information needed for the KPIs.
- ✦ They may not have access to the information, or the resources (manpower, money or time) to gather it.
- ✦ In the short term, you can adapt the KPIs you track to take into account the lower accuracy / availability of information. This could involve combining several individual KPIs into a broader topic, or using less accurate information than you would ideally choose to.
- ✦ While this is okay as a short term solution, you should encourage your clients to improve their record keeping and connect them with support services who can help them, for example by training them on financial planning and accounting.
- ✦ Enabling and educating your client on what data to collect and how, is part of the role of business coach.

ACTIVITY 06

The Action and Skills Development Plan

Time: 45 minutes

By the end of the activity, you will have been introduced to the Fishbone Analysis as a tool for understanding causes of problems, and practised using it in context in setting SMART objectives.

Activity 6a: Fishbone Analysis

The Fishbone Analysis is a technique to identify the root cause(s) of a problem, as a prelude to fixing it. It is called fishbone because it looks like this:

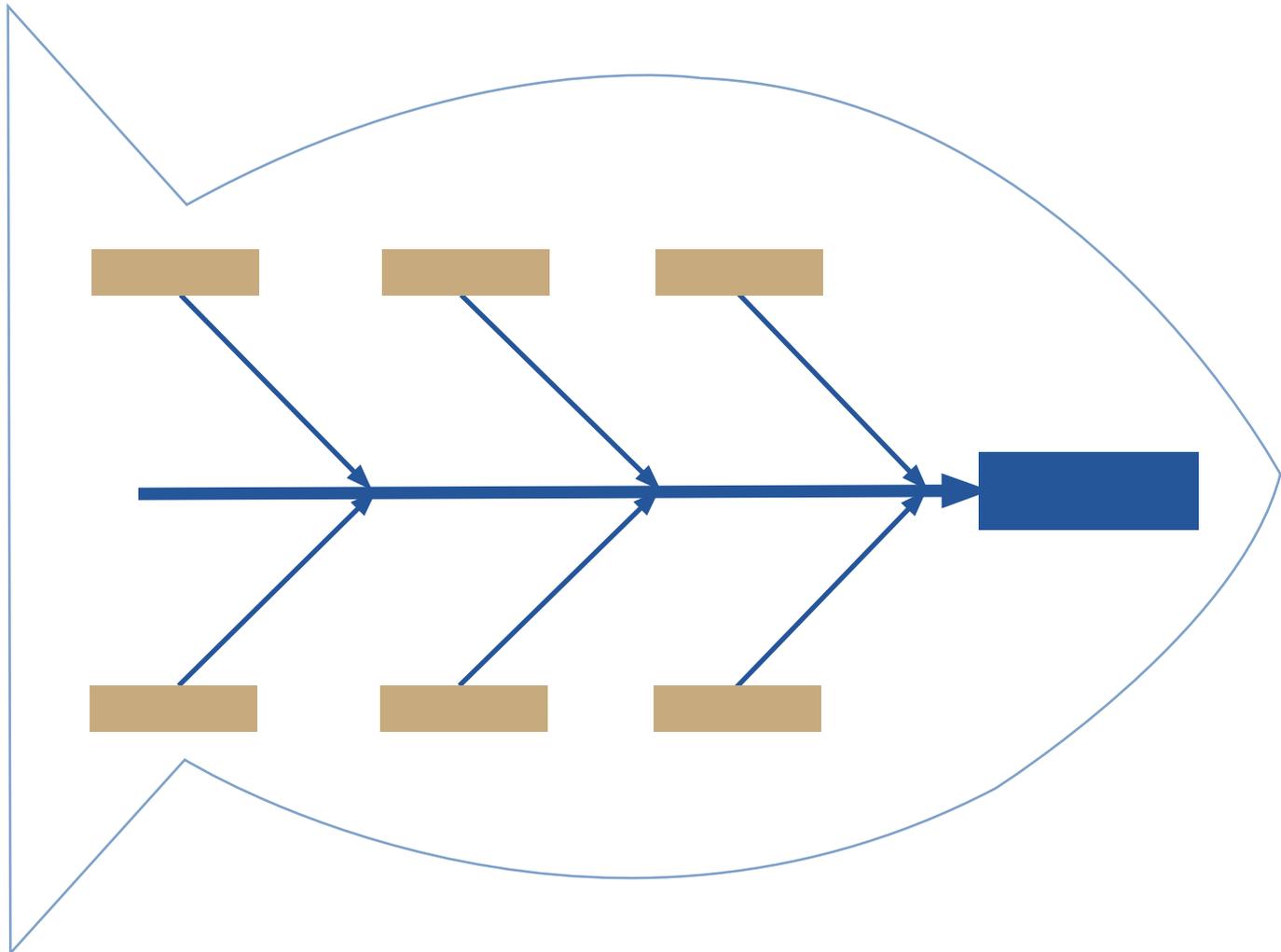


Diagram 09 - 6a: The Fishbone Diagram

These are the steps to conduct a Fishbone Analysis. Each has a missing word. What do you think it is?

Step 1: Define the _____. Usually in the form of a question.

Step 2: _____ the categories you will use in the brainstorming.

Step 3: Brainstorm each category. Dig deep to uncover the _____ root cause

Step 4: Analyse the results. Evaluate and prioritise them and take _____.

Question 2

Step 1: We are going to analyse the problem in the Singing Fish Guesthouse of the poor ranking for cleanliness. How can we define this problem as a question? Write it in the 'head' of the fish.

Step 2: What categories will we use for brainstorming? The trainer will lead a discussion about this.

Step 3: We need some more information, first. The cleaning is done by Kannan's daughter, Nadanam. She also makes breakfast, which Kannan serves. She is generally finished by 10 am, which only gives her an hour before she has to go to her job. She is very long sighted, and has a problem seeing things too close, but she doesn't like wearing glasses when cleaning, as the glasses are loose and fall off. Kannan's wife, Harathi, does the shopping, but hates, really hates, cleaning. Now, dig deep in each category (you can invent more likely factors if you like).

Step 4: Analyse the result; what action would you suggest?

Activity 6b: Action and Skills Development Plan

Look at the Action and Skills Development Plan your Trainer gives you. Please note it is very easy to add more lines if you have two actions to record under 'Product' for example. Simply highlight the whole line, right-click on it, and select 'add extra line above' (or 'below').

With your partner, answer the following questions:

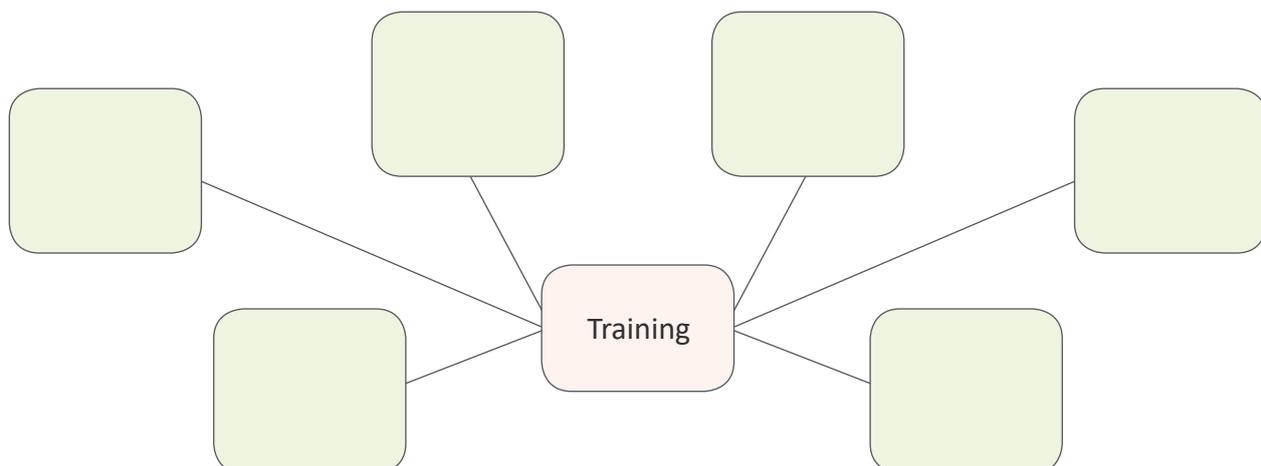
1. Which heading on the form should the issue with cleanliness come under?
2. Under 'Areas Of Focus for Action' you can record 'Cleanliness'. What will you record under 'What to do'? You can have more than one objective, but remember to make it / them SMART!
3. What resources will be necessary to do this?
4. If you have any SMART objectives about training (which we will look at in the next activity), which section of the form would you record them under?
5. In the remaining time for this activity, what further SMART objectives can you think of from what you currently know about Singing Fish?

ACTIVITY 07**Training Interventions and Skills Development****Time: 35 minutes**

By the end of this activity, you will have brainstormed possible training needs and training providers and will have written SMART objectives for this field.

Activity 7a: Training**Question 1**

Sometimes you will want to recommend training for the client or the client's staff. In groups build up a mind map below of areas / subjects that clients in the tourism and hospitality sectors may need training in.



Question 2

Now consider each area on your mind map where they may be able to access this training. Consider government and private institutions, and online providers.

Activity 7b: Adding Skills Development to the Action Plan

You probably have already thought of some likely skills gaps in the Singing Fish Guesthouse, gaps between what people can do, and what they should be able to do. In groups of three, discuss:

1. What training may be appropriate to include in the Skills Development and Action Plan for the Singing Fish?
2. Write at least two SMART objectives concerned with training to include in the plan.
3. They may concern provision of training or investigation of training options. It would not be unusual to have a SMART objective concerned with investigating provision, and when that is completed, a new SMART objective about attending training. Write your objectives below:

Objective 1: _____

Objective 2: _____

ACTIVITY 08

The Coaching Activity Report

Time: 30 minutes

By the end of the activity you will have become familiar with the objectives of the Coaching Activity Report, and seen how exposure visits can be included in it, and as objectives in the Action and Skills Development Plan.

Activity 8a: Exposure Visits

Sometimes it is difficult to understand what is possible, what could be done if you have not had exposure to how it is done better elsewhere. A visit can open a client's eyes to possibilities.

Question 1

Consider these clients. Where may you recommend they make an exposure visit? You will need to think of a specific place. A good exposure visit will not be 'industrial espionage' (spying); it will be set up with the host's agreement, by appointment. Especially if a journey is involved, it will not be to look at / consider a very narrow area, but to be broader, even if it was a narrow area that provoked the visit. It will involve discussion, two business people sharing ideas and discussing the market, trends, possible future developments and ways to exploit them. It will be 'win-win'. Also, a 'visit' could be virtual, but that would probably lessen the impact.

1. Anthony is a member of a tuktuk association you are working with. He loves to decorate his tuktuk, and has heard of tuktuks on the south coast painted and equipped specially for the tourist market. He is aware, though, that if he overdoes this he may lose local custom.
2. Aisha has a homestay business. She has a sizable garden and grows a lot of vegetables. But the garden is also used as something of a junkyard, the beds are productive (tomatoes, aubergines, ladies fingers, chillies, etc) but not really tidy, there are some flowering bushes but they are rather wild, and there is no sitting area. For Aisha a garden is just somewhere you grow food. She doesn't believe it can be an attraction.
3. Wasanthi has a restaurant near one of the outlying sites in Polonnaruwa. A lot of visitors come out there, and some have lunch, but many just have a cold drink. She makes delicious Sri Lankan food, with organic ingredients. She is vegetarian, but usually has fish or chicken curry for her customers. The restaurant is very plain, with bright plastic furniture, plain plastic plates and metal cups. You think that if she used a lot more local materials she could really make it a featured restaurant, but Wasanthi says 'why do I want my grandmother's house? It's not modern!'

Activity 8b: Coaching Activity Report

The Coaching Activity Report has a table at the top for recording who you have visited, when, where, etc. It then has eight questions, each has a box under it for typing in, which will expand as you type. The boxes are cut out from here. Note that this report is just for you, and will act as a reminder of where you have got to for your next visit.

Here are the eight questions. Most have an explanation, but all or part of the question has been removed to the box at the bottom. Can you match them?

1. _____
(What was the main focus of the coaching session, any specific emphasis)

2. _____
(Bullet point summary of client achievements or difficulties)

3. _____
(Identify changes and progress with implementation action plans and provide supporting evidence)

4. _____
(Barriers to progress such as logistics, resources, timing)

5. _____
(Subjects / topics where the client needs assistance or areas where staff need improvement. Areas where the client could be helped through other business development services like exposure visits or training. Could include business planning, systems, employment best practices etc.)

6. _____ / areas to revisit in next coaching session

7. Any other comments / _____

8. _____ What pleased you, and how do you think this session could have been conducted even better? (If you are also filling a log, feel free to copy and paste between it and this question.)

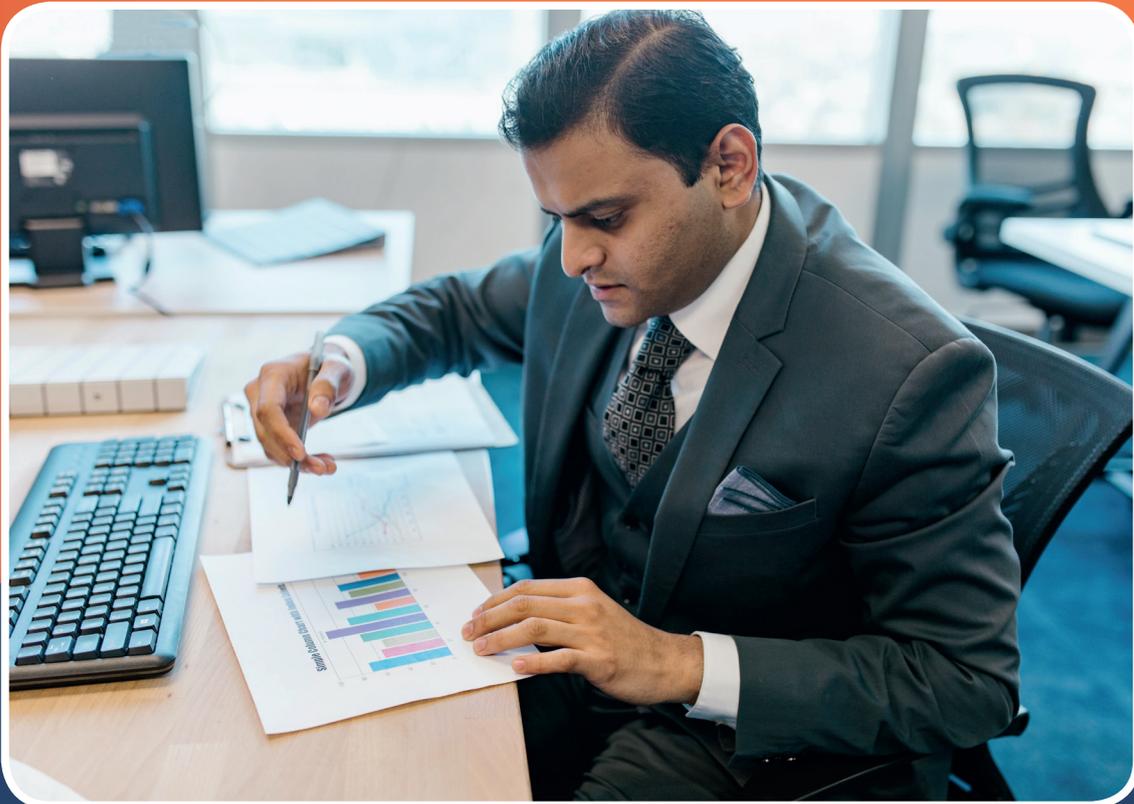
A. Significant issues or problems encountered	B. Feedback on the client
C. Activities and key achievements identified with the client	D. Objective of the session
E. How do you feel you performed as a coach?	F. Skills gaps or needs identified
G. Follow up points	H. Progress in achieving Action and Skill Development Plan activities

Module 10

Giving Feedback



5 hours 25 mins



Module Aims: By the end of this module, you will be able to...

1. Articulate qualities and techniques for giving feedback to clients that help monitor and evaluate the coaching process.
2. Describe approaches for implementing formal and informal feedback with clients.
3. Identify what is needed in a final session with a client so that the client is ready for their 'post-coaching' career and the coach receives feedback on their own effectiveness.

Module 10: Giving Feedback

ACTIVITY 01

Providing Effective Feedback

Time: 50 minutes

By the end of this activity you will have considered rules and useful qualities for providing effective feedback and applied these to your own experiences of receiving feedback.



Activity 1a: Basic Statements About Feedback

Read the statements about feedback in the following table. How much do you agree with each statement? Give each statement a score by ticking one of the five right-hand columns next to each statement.

Then work in pairs. Tell your partner about the score you gave each statement and why. Did your partner give each statement a similar score?

Statement	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1. We all need people who will give us feedback. That's how we improve.					
2. Almost by definition, a client who seeks business coaching wants feedback.					
3. When giving feedback, the coach acts as both a role model and an agent of change.					
4. Feedback is about changing behaviour, by helping others understand and improve their performance.					
5. Feedback is about comparing performances, by helping others understand where they are in relation to peers or their own performance in the past.					
6. Feedback is about celebrating success and motivating clients.					

Activity 1b: Making Your Feedback Effective

Here are five rules for giving effective feedback to your clients. Work in pairs. Complete the gaps in the rules using these words: specific / impact / body / permission / judgmental

When giving feedback to your client:

1. Ask for _____ first
2. Be _____
3. Be non-_____
4. Be mindful of your _____ language
5. Explain the _____

Activity 1c: Ten Important Qualities for Feedback

Now get into groups. Here is a more detailed diagram showing and explaining ten qualities that you need to have to make your feedback effective. In your group, fill the nine gaps in the table using the qualities and explanations listed after it. The first one has been done for you.

	Quality	Description
1	Timely	Give the feedback as soon as possible after the event, when it is important, relevant and fresh
2	(1)	Not a single event / conversation that is not spoken of again
3	Sincere	(2)
4	(3)	Give the feedback in a straightforward manner
5	Honest	(4)
6	(5)	Avoid giving a lecture to your client. Ask their views and engage your client in self reflection
7	Non-judgmental	(6)
8	(7)	Identifies an area or goal work working on, not 'nit-picking' unimportant things
9	Supported	(8)
10	(9)	The feedback you give should be meaningful to the client in terms of their intended goals and outcomes

A. Two-sided

B. Direct

C. Valuable

D. Ongoing

E. Important

F. Based on facts and behaviors, not on personal factors

G. Supports the individual without taking away their responsibility

H. Mean what you say and say it with care and respect. Avoid cliches and "yes, but" messages that dilute the sincerity of the intended message.

I. Offer a description of what you saw or experienced, rather than a judgement.

ACTIVITY 02**Types of Feedback****Time: 50 minutes**

By the end of this activity you will have identified some characteristics of positive and negative feedback, explored feedback approaches and applied what you have learnt so far to giving feedback to two different clients.



Activity 2a: Defining Positive and Negative Feedback

The trainer will divide your class in half and then divide each half into small groups. The groups in one half should discuss **positive** feedback and the groups in the other half should discuss **negative** feedback.

During your discussions, think about:

- ◊ What do the clients hear in this feedback?
- ◊ What things does the feedback focus on?
- ◊ What is often the result of the feedback?

Activity 2b: Exploring Two Types of Feedback

Remain in your groups. Now the trainer will assign you a common type of feedback to discuss. The groups in one half of the class should discuss and complete the table for **collaborative feedback**. The groups in the other half should discuss and complete the table for **guided** feedback.

The collaborative approach:

Read the information in the table and decide where these steps should go in the last four rows.

- ◊ Check for understanding using open ended questions.
- ◊ Describe the effect on the coaching relationship, or on the client's business or personal life.
- ◊ Identify the behaviour to be improved or reinforced. Be specific.
- ◊ Ask how the behaviour could be changed, improved or continued.

	The collaborative approach
Useful for	Promoting autonomy. Encourages the clients to think like a coach
Style	Conversational
Step 1	
Step 2	
Step 3	
Step 4	

The guided approach:

Read the information in the table and decide where these steps should go in the last four rows.

- ◊ Describe the unproductive consequences they will move away from. “And it will help you avoid ...”
- ◊ Describe the benefit or gain that they will move towards. “This will help you ...”
- ◊ Describe the specific behaviour. Use the phrase, “when you”
- ◊ Describe your suggested alternative behaviour. “You might consider doing this ...”

	The guided approach
Useful for	When the clients cannot provide their own solution. Leads them away from repeating unproductive behaviours.
Style	Descriptive.
Step 1	
Step 2	
Step 3	
Step 4	

When your group has completed the task and has checked the answers with the trainer, work in pairs with somebody who looked at the other feedback approach. Tell your partner about the approach your group discussed.

When your partner tells you about the approach that his or her group discussed, complete the table about it above.

Activity 2c: Tailoring Your Feedback

Return to the groups you were in for Activities 2a and 2b. Now the trainer will assign you a profile of a client. In your groups, discuss what sort of feedback might be suitable for this client. Think about:

- ▶ Which of the two approaches in Activity 2b might be appropriate? Why?
- ▶ Which qualities in Activity 1c might be necessary? Why?
- ▶ Are there any other suggestions you would make for giving this person feedback?

Client A: Sharon

Sharon was a senior employee in a retailing company selling clothes, textiles, fabrics and crafts to tourists. Later, she opened her own shop and sold similar goods. She hired you as a coach because she has started a new tourist-orientated business, a café-restaurant with a private art gallery and a party venue for hire. She is unfamiliar with these fields and she thought it would be useful to have someone to observe her and give her advice. You feel she is very professional and efficient, but she has strong, firm views about how to do things and can sometimes be harsh and undiplomatic with her staff and customers.

Client B: Ravi

Ravi is a boat owner, sailor and fisherman who has started an aquatic tour company taking tourists on whale-watching and deep-sea fishing trips. He is still early in his business career and this is the first time he has started his own business venture. You feel he is a good learner and can pick up new skills quickly, but he is lacking in confidence. Also, he is nervous because the stakes are high for his new venture. If it fails, he will lose a great deal of money.

After your group has discussed the client, go back to the partner you worked with at the end of Activity 2b. This time, tell your partner about your client, what approaches and qualities you would use in your feedback with him or her, and why.

ACTIVITY 03**Barriers to Feedback****Time: 45 minutes**

By the end of this activity you will have identified barriers to giving effective feedback that come from both the coach and client and discussed ways of overcoming these barriers.

**Activity 3a: Reacting to a Feedback Role-play**

The trainer will perform a role-play. In the role-play, a coach gives feedback to a client about a business presentation about marketing techniques that the client gave recently. Watch the role-play and think about these questions.

- › How does the client feel during the feedback?
- › What does the coach do that makes the client feel like that?
- › Are there any other problems with how the feedback is conducted?

Afterwards, read what the coach and client said during the feedback and think about the questions in more detail.

COACH: We'll use the canteen for this. It's a bit noisy here, but I think we can manage. Now then, I'd like to give you feedback about that presentation you gave last month.

CLIENT: Which one was that? The one at the Ideas Market Forum?

COACH: No, the presentation you gave in these premises, about marketing techniques.

CLIENT: That was three weeks ago. I'm not sure if I remember it very well...

COACH: I know, I'm sorry, but I've been busy with commitments to other clients. I just haven't had time to talk to you sooner about it. Anyway, It wasn't very successful, was it?

CLIENT: Well, I remember being disappointed. I thought the audience would show more interest than they did...

COACH: I'm not surprised they didn't show interest. It was a very flat presentation.

CLIENT: I'm sorry, I can't hear you. The people at the next table are making too much noise.

COACH (*very loudly*): I said, it was a very flat presentation!

CLIENT: Flat?

COACH (*still loudly*): Flat! Flat because of how you talked. I've told you before to use your voice in a more interesting way. Be assertive for a start. Speak up so that people can hear you clearly. Use intonation. Make your voice rise and fall so that you aren't speaking in a monotone. And pause after sentences – you rushed through it. No wonder they didn't pick up most of the information!

(The client is looking around, embarrassed. People at other tables in the canteen must have heard the coach and are looking at them.)

CLIENT: I'm sorry. I'm not really an outgoing person. Giving presentations makes me feel so shy and nervous...

COACH (*ignoring the client's words*): But your body language made it worse. No eye contact with the audience because you were too busy reading from your script. At one point you scratched your nose, which looked terrible. And this obsession with your hair –

CLIENT: My hair?

(The coach plays with his / her own hair, to show the client what he / she was doing.)

COACH: Yes! All through the presentation, while you spoke, you touched and played with your hair, like this. How can you expect the audience to take you seriously when you're behaving like a vain schoolgirl?

CLIENT: I'm sorry...

COACH: I'm so disappointed. I've spent a lot of time telling you these things so that you make your presentations better, but you won't listen. Well, please listen this time. When you give presentations, be assertive. Speak up so everyone can hear you, though don't shout at them of course. Vary your intonation so you sound interesting. Use pauses so the audience has time to take in the information. Think about your body language. Look at the audience as much as you can. Don't have your head bowed over the script all the time. And avoid touching things like your nose or hair. That's so distracting for the audience! Have you got that?

CLIENT: I think so...

COACH: Good!

Now work in pairs. Discuss your answers with a partner.

Activity 3b: Listing Feedback Dos and Don'ts

You have already identified some dos and don'ts for giving feedback with your classmates and trainer. Now work in groups. The trainer will give you a sheet of paper and a marker pen. Divide the sheet into two columns, head one column 'dos' and head the other 'don'ts'. Brainstorm other dos and don'ts for giving feedback. List them in the appropriate columns.

While you brainstorm, think about these factors:

- ✦ Objectives
- ✦ Clarity
- ✦ Frequency
- ✦ Duration
- ✦ Tone
- ✦ What you do before the feedback

When you have completed your list, stick it on the wall. In your group, walk around, read and discuss other groups' lists. Did they have dos and don'ts that your group didn't think of?

Activity 3c: Dealing With Inflexible, Defensive or Sensitive Clients

Sometimes feedback is difficult not because of the coach, but because of the client. People don't like feeling that they are doing something wrong. Even if the coach gives feedback using the right approaches and showing the right qualities, the client may react negatively. He or she may reject the feedback outright or may become defensive and immediately try to justify his or her actions. People are particularly sensitive to feedback when:

- ✦ The stakes are high and the matter they are getting feedback on is important to them.
- ✦ They have low self-confidence.
- ✦ They have a fixed mindset and believe that change is not possible.
- ✦ They feel they are being judged or criticised.

Here are some strategies for giving feedback to inflexible, defensive or sensitive clients. Work in the same groups you were in for Activity 3b. Discuss each strategy and decide what its possible advantages and disadvantages are.

Strategy	Possible advantages	Possible disadvantages
A. Remind them that the feedback is just information. It is not a judgement of their worth as a business owner or entrepreneur.		
B. Explain that rejecting feedback generally means rejecting change. If they don't want to change, what do they hope to get out of business coaching?		
C. State that they don't appear to see the feedback as helpful and ask them how they would like to proceed.		
D. If feelings and emotions become too strong, take a break from the conversation. Resume once you have both gathered your thoughts and are able to be cooperative.		
E. Always remember to remain calm, professional and to communicate clearly.		

Key points:

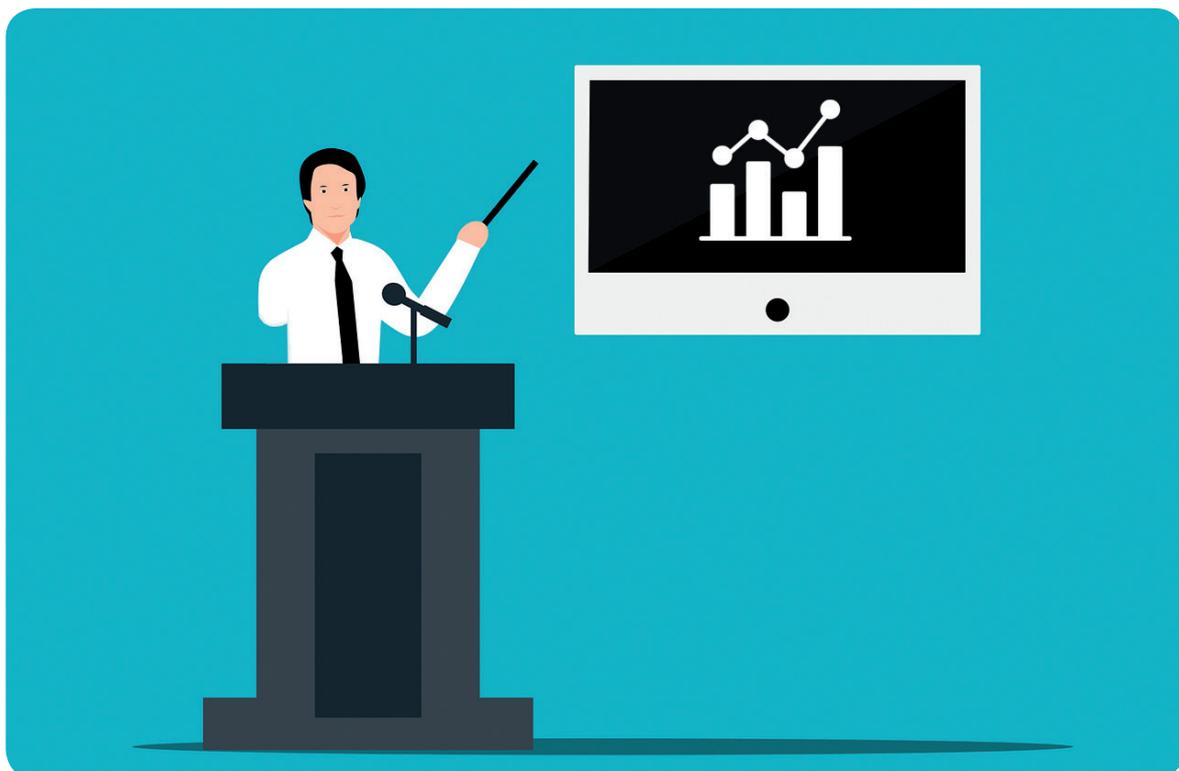
- ✦ When giving feedback, coaches should be calm, polite and professional and not judgemental or critical. Feedback should be given soon after the event and in a private setting.
- ✦ A number of important factors need to be considered when giving feedback, including objectives, clarity, frequency, duration, tone and what happens before it.
- ✦ Clients are particularly sensitive to feedback when the stakes are high and what they are getting feedback on is important to them, when they have low self-confidence, when they have a fixed mindset or when they feel they are being judged or criticised.
- ✦ There are various strategies for giving feedback to inflexible, defensive or sensitive clients, for example, reminding them that feedback is information rather than a judgement, or explaining that rejecting feedback means rejecting change.

ACTIVITY 04

Ways of Guiding Your Clients

Time: 45 minutes

By the end of this activity you will have planned a role-play of a feedback or post-feedback session where a coach guides a client using questions, explanations or demonstrations.



Activity 4a: Prompting Feedback With Questions

Clients will engage more with solutions they have thought of themselves rather than solutions that are just 'given' to them by their coaches. Asking the right questions will help a client to clarify issues, confront problems and develop a clearer plan for improvement.

Look at the following questions. Which of these questions would you ask:

1. Earlier in the feedback session, so that the client 'provides their own feedback' about what they have done?
2. Later in the feedback, to encourage the client to think about how they can change and improve?
 - A. What went well?
 - B. Has any of this feedback surprised you? Why?
 - C. What changes would you like to make next time?
 - D. May I tell you what I liked?

Now discuss these questions with a partner and put them in the correct columns in this table:

Questions to ask earlier in the feedback session to make clients think about what they have done	Questions to ask later in the feedback session to make clients think about how they can change and improve

Finally, in pairs, think of more questions that you could write in each column.

Activity 4b: Explaining and Demonstrating

We need to follow up feedback by encouraging the client to change and improve. Two ways of encouraging change and improvement are by **explanations** and **demonstrations**.

- ◊ Explanations help the coach to transfer knowledge from the coach to the client. They make clear the causes, context and consequences of a particular situation or a particular set of facts. They help the client to understand the link between cause and effect and problem and solution.
- ◊ Demonstrations show the client, step by step, how to perform a task and, if necessary, repeat those steps. Demonstration offers a visual pathway to learning. It teaches theory along with practice.

Stay in the pairs you were in for Activity 4a. Discuss and complete this table about explanations and demonstrations. The missing items are listed below. They can be added to the columns in any order.

Explanations	Demonstrations
Keep it lively and engaging	
Check understanding by asking questions	Check understanding by asking questions

A. Ensure you can be clearly seen and heard.

B. If possible, do it in the same location that your client would use.

C. Plan what to say in advance.

D. Repeat it as necessary.

E. Keep what you say clear, simple and brief.

F. Use non-verbal communication too.

G. Keep what you do simple and focus on one or two key points.

One more question. After the coach has explained and demonstrated, what does the client need to do?

Activity 4c: Preparing a Role-play

Work in three groups, A, B and C.

First, the trainer will act out a presentation. Imagine the presenter is the client who appeared in the role-play in Activity 3a and the presentation is what made the coach so angry in that role-play. Imagine **you** are the client's coach. You will speak to him or her after watching the presentation.

Prepare a role-play between the client and the business coach. Unlike the coach in Activity 3a, the coach should be a good one who wants to engage and motivate the client and improve his or her performance!

- ✦ Group A: In your role-play, show a feedback session where the coach uses questions to help the client think about what he or she did in the presentation and identify ways to improve in the future.
- ✦ Group B: In your role-play, show a post-feedback session where the coach uses explanations to help the client prepare for future presentations.
- ✦ Group C: In your role-play, show a post-feedback session where the coach uses demonstrations to help the client prepare for future presentations.

You can look at the script in Activity 3a as an example of what **not** to do!

When you are finished, present your role-plays to your classmates.

Key points:

- ✦ Asking the right questions during feedback will help clients themselves to clarify issues, confront problems and develop a clearer plan for improvement. Some questions should be asked earlier in the feedback session so that clients provide their own feedback about what they have done. Other questions should be asked later to encourage clients to think about what they can change and improve.
- ✦ Explanations help coaches to transfer knowledge to clients. They make clear the causes, context and consequences of particular situations or sets of facts. They help clients to understand the link between cause and effect and problem and solution.
- ✦ Demonstrations show clients, step by step, how to perform a task and, if necessary, repeat those steps. Demonstration offers a visual pathway to learning and teaches theory along with practice.

ACTIVITY 05

More Feedback Practice

Time: 45 minutes

By the end of this activity you will have participated in, observed and offered 'feedback' on a feedback session.



Activity 5a: Evaluating a Business Email

Imagine that this is a business email that your client has sent to a potential customer. Read it and then work with a partner. Discuss how you would feel if you received this email. Would you be impressed? Would you think the writer was professional? If not, make a list of its problems. Also, does it have any positive features?

Activity 5b: Giving Feedback on the Email

Now, with the same partner, discuss what you would say to the client if you gave feedback to him about the email.

Think about which of these qualities you would use and how you would use them during feedback:

	Quality	To think about
1	Sincere	How will you say what you mean, but with care and respect?
2	Direct	How will you give feedback in a straightforward manner?
3	Honest	Can you base feedback on facts, not on personal factors?
4	Two-sided	Can you avoid giving your client a lecture? Can you ask their views and engage your client in self-reflection?
5	Non-judgmental	Can you offer your client descriptions rather than judgements?
6	Important	Can you identify an area or goal to work on and not 'nit-pick' unimportant things?
7	Supported	Can you support the individual without taking away their responsibility?
8	Valuable	Will feedback be meaningful to the client in terms of their intended goals and outcomes?

Also, think about how you could use these things in your feedback:

- ◊ Questions
- ◊ Explanations
- ◊ Demonstrations (Are demonstrations possible when you give feedback on business emails?)

Activity 5c: Setting Up and Conducting a Role-play

The trainer will now give each pair a letter, A or B, and each person in each pair a number, 1 or 2. Then you will receive a role-play card according to your letter and number: A1, A2, B1 or B2.

Read the card and put yourself in the person's position. Imagine how they would feel when they are involved in feedback. Think about this especially if you have the role of a client!

Now the trainer will join your pair with another pair. Each pair 'A' works with a pair 'B'. Conduct two role-plays:

- ◊ A1, the coach, gives feedback to B2, the client.
- ◊ B1, the coach, gives feedback to A2, the client.

During each role-play, the two participants who aren't taking part should act as observers. They should watch and listen to the coach and fill in this observation task about his or her feedback performance.

Observation Task – The Coach's Feedback

Which of these qualities does the coach show? Tick each one you see or hear. If possible, describe or give an example of it.

Quality	Tick (✓)	Description / Example
Sincere		
Direct		
Honest		
Two-sided		
Non-judgmental		
Important		
Supported		
Valuable		

Are any of these things used? Again, tick each one you see or hear and, if possible, describe or give examples.

Item	Tick (✓)	Description / Example
Questions		
Explanations		
Demonstrations		
Anything else? (e.g. body language)		

Give a summary of things you liked most about the feedback and any suggestions you have for improving it.

What you liked most about this feedback	
Suggestions you have for improving it	

Activity 5d: Giving Feedback to the Feedback

In your groups of four, give the coaches in the role-plays some 'feedback' on their feedback. Each time:

- ◆ The two observers should tell the coach what they observed and thought about the feedback session. Use the comments they made in the observation task above.
- ◆ Also, the person playing the client should tell the coach how they felt during the feedback session.

Key points:

- As was stated in Activity 1, there are many qualities of good feedback: for example, being timely; ongoing; sincere; direct; honest; two-sided; important; supported; and valuable. This should have been reinforced by Activity 5's role-play.
- As was stated in Activity 4, coaches can employ questions, explanations and demonstrations during feedback. This should have been reinforced by Activity 5's role-play.
- There are a number of conventions that should be followed when writing business emails. These include: appropriate use of lower and upper-case letters; appropriate opening and closing terms; avoidance of text-style acronyms; accurate spelling; accurate grammar; and use of formal, polite (but also readable) language. Business emails should be sent from work addresses rather than personal ones.

ACTIVITY 06**Avoiding Coaching Challenges****Time: 45 minutes**

By the end of this activity you will have discussed five common challenges to coaching and formulated ways of avoiding or overcoming these.



Activity 6a: Have You Had Problems Coaching Someone?

Think of a time you coached, advised or gave feedback to someone – unsuccessfully. You didn't have the desired effect and the person's behaviour or performance didn't improve, or it got worse, afterwards. The situation doesn't have to be a business one. It could be coaching, advice or feedback given in any situation. Think about what went wrong. Was it your fault, or the fault of the person receiving the coaching? Or was it because of both of you? What happened or didn't happen?

Now work in pairs. Tell a partner about your experience.

In this activity we will look at some typical examples of challenges to coaching, and how these can be avoided or overcome.

Activity 6b: Identifying Challenges to Coaching

The trainer will divide you into four groups, A, B, C and D. Each group should read and discuss the corresponding statement in the boxes below.

Each time, think about these questions.

1. Is the attitude of the coach or client a problem for the coach-client relationship?
2. If so, what is the problem?
3. Can you describe in detail **why** this is a challenge for the coach-client relationship?

Group A's statement (made by a coach)

"In my opinion, my client has very little business experience, knowledge or self-confidence. I really don't think he's capable of running his business properly. Therefore, I feel it's my job to tell him what to do. This means I spend a lot of time giving him instructions, which can be exhausting. However, at least I'm stopping him from making stupid mistakes – which he would do if I wasn't there!"

Group B's statement (made by a client)

"I've been working with a business coach for a few months now. Occasionally, I've found it helpful. But to be honest, most of the time, I don't know why I'm doing this. Sometimes the coach tells me things that I already know, and sometimes she gives me information that isn't relevant to my business. Most of the time, our relationship just 'wanders' along, not helping me very much."

Group C's statement (made by a client)

"I'm so lucky to have a business coach as experienced as my coach. She knows a lot. In fact, I've persuaded her to take responsibility for parts of my job, make decisions for me and even handle some of my tasks. She isn't happy that she has to do this, but she should be proud. It shows how good she is!"

Group D's statement (made by a coach)

"Dealing with this guy is such a headache! I try to determine what exactly he wants or needs from our coaching relationship, but he's rarely clear – I don't understand what he's talking about. Or he tells me he wants one thing from my coaching, but then the next day he contradicts himself and says he wants something completely different."

After your discussion, describe the challenge to your trainer and your other classmates.

Activity 6c: Finding Solutions to Coaching Challenges

Remain in your groups from activity 6b. However, now, you have to find a solution to one of the other groups' challenges.

- ◆ Group A: Discuss the 'lack of direction' challenge (Group B's statement above).
- ◆ Group B: Discuss the 'spoon-feeding' challenge (Group A's statement above).
- ◆ Group C: Discuss the 'ineffective communication' challenge (Group D's statement above).
- ◆ Group D: Discuss the 'dependency' challenge (Group C's statement above).

Think about who has to take the initiative to solve the problem – the coach, the client or both. What do they need to do?

Afterwards, the trainer will pair you with someone who identified the challenge in activity 6b. Tell your partner what you would do to solve it. Does your partner think your solution would work?

Activity 6d: What To Do About a Lack of Commitment?

Read this statement by one more, unhappy coach. What is the challenge here and what is the solution? Discuss with your partner from activity 6c.

“My client took me on as a coach because his business partner suggested it. He did it to keep the partner happy. But he isn’t really interested. He finds reasons not to work with me – often he says he’s ‘too busy’. When I do talk to him, it’s obvious he isn’t listening.”

Key points:

- One challenge to the coach-client relationship is when clients become too dependent on their coaches. To avoid dependency, coaches should set expectations and make clear to clients what the coach / client relationship is.
- Another challenge is when coaches ‘spoon-feed’ their clients. To avoid spoon-feeding, coaches should share several possible solutions, with their pros and cons, and encourage clients to decide on what action to take.
- Another challenge is lack of direction. To create direction, coaches should take the lead to create a structure for success, for example, by using a coaching model such as TGROW and using open-ended questions to elicit from their clients.
- Another challenge is ineffective communication. To improve communication, coaches need to understand which communication style and approach will work for each client and tailor their coaching accordingly.
- A final challenge to the coach / client relationship is lack of commitment by clients. In these cases, coaches should be frank and honest with clients and stress that their commitment is essential for the relationship to work. If clients still can’t give commitment, it would be better to end the relationship since clients aren’t benefitting from it and coaches are wasting their time. Coaches should remain professional, helpful, confidential, punctual, etc., even if clients don’t appreciate this.

ACTIVITY 07**Final Session****Time: 45 minutes**

By the end of this activity you will have brainstormed things to do and questions to ask during the final session in a coach-client relationship and considered reasons for keeping in contact with clients afterwards.

**Activity 7a: Ending a Business Relationship**

Think about a long business relationship you once had with somebody – a client, a colleague, a partner, a consultant, etc. What happened when you had your last professional meeting or session, or last working day, with that person? Think about these questions:

- › What things did you do with the person during this last professional contact?
- › Did you celebrate anything? What? Why?
- › Did you reflect on anything? What? Why?
- › Did you ask any questions? About what? Why?
- › How did you feel?
- › Was it really your last professional contact with the person? If not, why not?

Now work in pairs and tell your partner about it.

Activity 7b: Things To Do During the Final Session

The session you have at the end of the coaching cycle will have a different format from the rest of your sessions. Therefore, it is usually seen as a separate step in the coaching process. The purpose of the final session is to review and solidify what the client gained from their coaching experience and to set them up for life 'post-coaching'.

In your pairs, think about the things you should encourage your client to do during the final coaching session. Use these cues to help you:

- ◊ Reflect on...
- ◊ Ask any...
- ◊ Celebrate...
- ◊ Identify...
- ◊ Consider...
- ◊ Evaluate their...
- ◊ Evaluate your...

In addition, is there anything else you can think of?

Activity 7c: Questions To Ask During the Final Session

Once again, to make this final session successful, it is important that you ask appropriate questions.

Now work in groups. Your trainer will give you a sheet of paper and a marker pen. Brainstorm a list of questions you would ask a client during the final session and list them on the sheet.

When you have finished brainstorming, consider this situation. Due to unforeseen circumstances (a family illness, a severe weather warning, a sudden announcement of a COVID-19 lockdown, etc.), you and your client will have to cut your final session short. You will only have time to ask four of the questions on your list. Discuss in your groups – what are the **four** most important questions you have listed? Put a line through all the other questions, so that there are only four questions left on your sheet.

Quickly, present your choice of four questions to the other groups. Why did you pick them? Why do you think they are most important?

Module 11

Business Leadership Skills



6 hours



Module Aims: By the end of this module you will be able to...

1. Explain what leadership is.
2. Help clients make decisions.
3. Identify which leadership attributes your clients need to develop.
4. Help your clients adopt different leadership styles for different situations.
5. Increase your clients' ability to get their staff to work with energy.
6. Help your clients to become Resolute Leaders.

Module 11:

Business Leadership Skills

ACTIVITY 01

What Is Leadership?

Time: 1 hour 40 minutes

By the end of this activity, you will be able to explain to your clients what leadership is.

Activity 1a: Find the Leaders

Your trainer will give you Handout 1. Follow the task instructions on the handout.

Activity 1b: Leaders or Managers?

Your trainer will give you Handout 2 with task instructions.

Key points:

- ✦ Great managers sometimes need to be great leaders – and sometimes they don't: it depends on what and who they are managing. For example, the manager of a bank may not need to be a great leader: the manager of a football team certainly does!
- ✦ Not all managers are great leaders: and not all leaders are great managers!
- ✦ One of the most important roles of a leader is to look far ahead – 'the vision thing' – think strategy – persuade and inspire others to follow – and take full responsibility for success or failure.
- ✦ Natural leaders can cope with 'ambiguity' – they are the ones who give a sense of direction in uncertain situations.

ACTIVITY 02**Leaders and Decision Making****Time: 40 minutes**

By the end of this activity, you will be able to help clients make decisions.

Your trainer will give you a handout. What are four methods a leader with a team can use to make decisions?

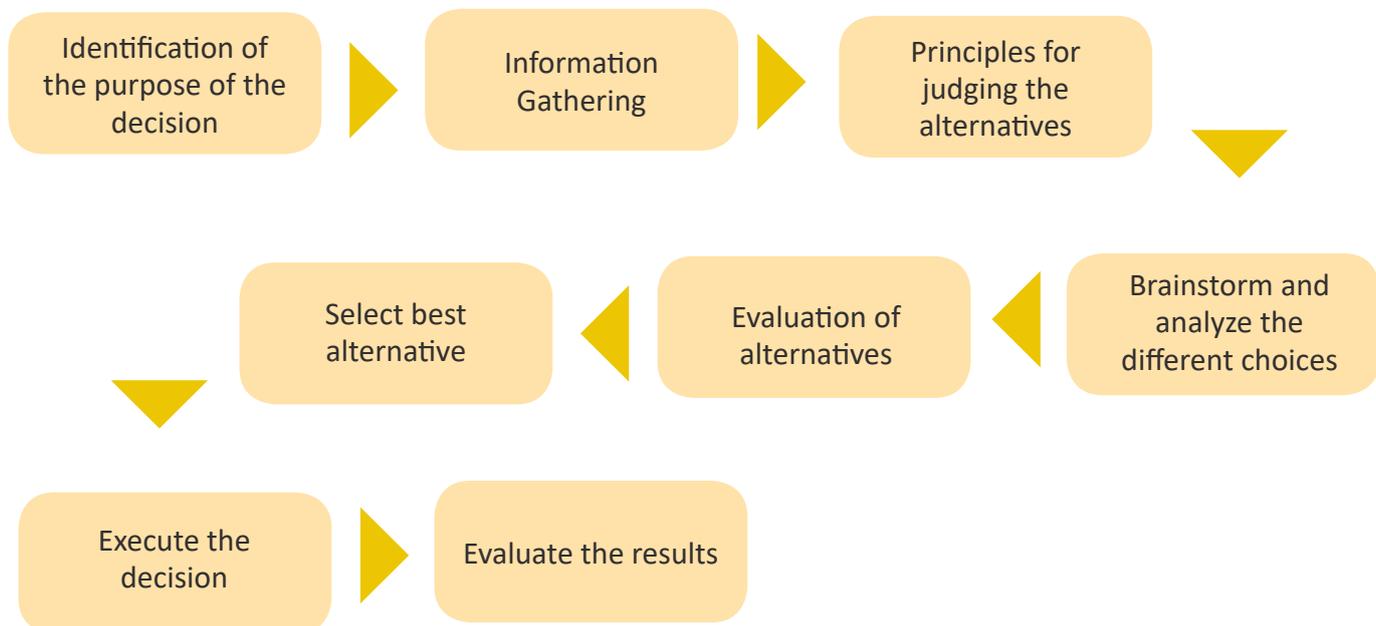


Diagram 11 - 2: Steps for making a decision

Key points:

- ✦ Leaders need to make important decisions, and they need to know **how** to make such decisions.
- ✦ They need to decide **how** to decide.
- ✦ Who else should be involved in making the decision and how?
- ✦ The better the decision-making process – the better the decision.

ACTIVITY 03**Leadership Attributes**

Time: 1 hour 10 minutes

By the end of this activity, you will be able to identify which leadership attributes your clients need to develop.

Activity 3a: Prioritising Leadership Attributes

Your trainer will give you a handout with task instructions.

Activity 3b: Coaching Leadership

Your trainer will give you a Handout with task instructions.

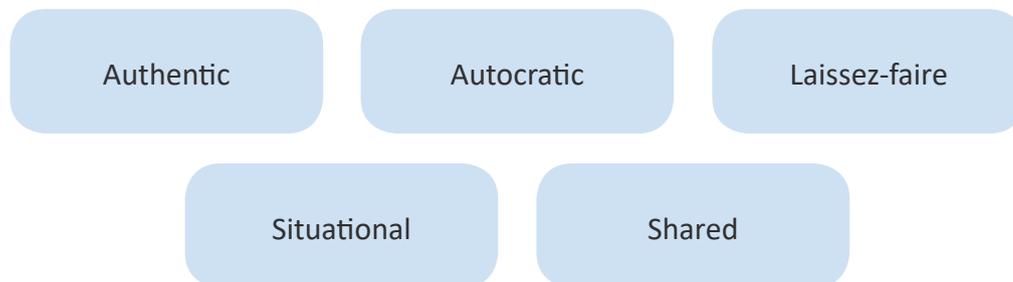


ACTIVITY 04**Leadership Styles****Time: 30 minutes**

By the end of this activity you will be able to help your clients use different leadership styles to deal with different situations.

Activity 4a: Match Up

Your trainer will give you a handout with task instructions.

**A.**

Power is not with one person. The employees can plan and think for themselves and this motivates them to work hard. The leader doesn't need to be everywhere because others are trusted to do what needs to be done.

B.

A leader with this style lets others use their own initiatives and ideas. In a business with talented and creative people, this works well. Employees can innovate which lets the company grow faster.

C.

With this leadership style there is no collaboration. The boss has all the power. This can work well for businesses where decisions have often to be made quickly. This style also often requires strict supervision of employees.

D.

A leader with this style is open with their feelings and ready to listen and learn from others. They are easy going, understand the people they work with, are always truthful, and never gossip.

E.

The focus is on the employees' abilities to do their jobs. This leader knows what the staff are good at and what they are not so good at. This means work deadlines and targets are much more realistic.

Business	Leadership Style
Small guest house with seasonal staff.	
Large hotel with fifty bedrooms.	
International corporation.	
Tour guide with part time staff.	
Restaurant with a dozen staff.	
Beautician shop owner working with two other beauticians.	
Hairdresser with two premises, each with a dozen staff.	
Chef with a dozen staff.	

Activity 4b: What's Your Style?

Do you prefer to focus on getting the job done, or building relationships? Think of someone you find it difficult to work with. Ring one number on each dimension to show how you perceive this person.

Pleasant 8 7 6 5 4 3 2 1 *Unpleasant*

Supportive 8 7 6 5 4 3 2 1 *Hostile*

Positive 8 7 6 5 4 3 2 1 *Negative*

Relaxed 8 7 6 5 4 3 2 1 *Tense*

Close 8 7 6 5 4 3 2 1 *Distant*

<i>Warm</i>	8	7	6	5	4	3	2	1	<i>Cold</i>
<i>Co-operative</i>	8	7	6	5	4	3	2	1	<i>Un-cooperative</i>
<i>Interesting</i>	8	7	6	5	4	3	2	1	<i>Boring</i>
<i>Open</i>	8	7	6	5	4	3	2	1	<i>Guarded</i>

Rating your leadership style:

Add up the numbers you have ringed. Then check your score and leadership style

9 - 18 = your leadership style is very task focused.

19 - 30 = your leadership style is mainly task focused.

31 - 41 = you are nearly balanced between the 2 leadership styles

36 = you are balanced between the two leadership styles

42 - 54 = your leadership style is mainly relationship focused.

55 - 72 = your leadership style is very relationship focused

Leadership Styles:

Task-focused leadership style:

- ◊ Is **directive**: you prefer to tell people what to do and how to do it.
- ◊ You prefer to be distant from your staff, (eg you like to sit in big chairs behind big desks).
- ◊ Your top priority is to **get results**.

Relationship-focused leadership style:

- ◊ You prefer to be **non-directive**: you like to delegate and consult.
- ◊ You prefer to be **supportive**: you like to motivate your staff.
- ◊ Your top priority is building good staff morale.

Neither style of leadership is "right" or "wrong"

A leader should change from one to the other according to the **task** and the **people**.

For example:

- ◊ In urgent difficult situations, a task-focused leadership is often best
- ◊ In daily routine work, relationship-focused leadership may be best.
- ◊ With skilled workers adopt a relationship focus, with unskilled a task based focus
- ◊ With good performers adopt a relationship focus, poor performers a task based focus.

A leader should adapt her / his leadership style to different tasks, different people and different situations. Like a chameleon.



Key points:

- Great leaders need to adapt the way they lead to fit who they lead – and the situation in which they lead.
- Well educated and reliable professionals may not want a directive leader – except perhaps in a crisis; they would prefer a relationship-focused leader.
- Staff who are not so confident about their work or what needs to be done may look for firm direction. They might feel more confident if their leader is task-focused.
- A great leader will be able to change style at a moment's notice if necessary.

ACTIVITY 05**Motivating Your team**

Time: 40 minutes

By the end of this activity, you will be able to increase your clients' ability to get their staff to work hard.

Activity 5a: Motivating Your Team

Learn the enablers that you can share to increase your clients' ability to get their staff to work hard.

Activity 5b: Team Task

In this task you will learn about types of motivation and which are intrinsic or extrinsic. Your trainer will give you handouts with task instructions.



Key points:

- › Which is the stronger motivator – success or money? Intrinsic or extrinsic?
- › Many intrinsic motivators – being ‘recognized’ or praised - do not cost anything; most extrinsic – fringe benefits, holidays – do.
- › Most intrinsic motivators are ‘Satisfiers’ - things motivate people to work harder.
- › Most extrinsic motivators are ‘Dissatisfiers’ - people feel dissatisfied if they do not have these things, but if you give these things, it will not motivate people to work harder.

ACTIVITY 06**Resolute Leaders**

Time: 55 minutes

By the end of this activity, you will be able to help your clients stand up against opposition to their plans and proposals.

Activity 6a: Case Study

Your trainer will give you a handout with task instructions. What should the manager, who is a Resolute Leader, do?



Module 12

Growth Mindset



4 hours 15 mins



Module Aims: By the end of this module, you will be able to...

1. Identify the characteristics of a Growth Mindset, identify its advantages over a Fixed Mindset and promote those advantages among clients where necessary.
2. Realistically appraise your own values, self-awareness and preferred modes of learning as business coaches and share these where appropriate with clients.

Module 12:

Growth Mindset

ACTIVITY 01

Personal and Professional Development

Time: 45 minutes

By the end of this activity you will be able to explain the difference between personal and professional development by giving examples.



Activity 1a: Match Up

What's the difference between personal and professional development? Working on your own, complete the beginnings of the statements with the ends of the statements in the boxes.

1. Professional development is
2. Personal development is ...
3. Professional development of skills in relation to your job makes you ...
4. Personal development can be...

...focused on the workplace.
...more effective in a particular workplace.
...nothing to do with your job.
...focused on communications, time management, and things such as leadership training.

Then check your answers with a partner. Also, discuss these questions. Can you give examples of personal and professional development? And which is more important for you and why?

Activity 1b: Statements About You and a Growth Mindset

Do you have a growth mindset? Working with a partner, look at the statements below and tick the box if it applies to you and your partner. Also, tick the statements that you think reflect a growth mindset.

	Me	Partner	Growth Mindset?
I try to work on my weaknesses.			
I prefer to stick with doing what I'm able to do.			
I actively seek out opportunities to grow and improve.			
I stop learning when I know what I need to know.			
I don't waste time on things that I am not any good at.			
I believe that people who value learning are more likely to succeed.			
I always feel I can do things better, no matter how well I do them.			
I studied at school and college and I occasionally do training courses. I don't feel I need to learn anything else outside of those things.			

Activity 1c: Seeking Opportunities for Development

Working with your partner, share some examples of how you could actively seek out opportunities to grow and develop. Also, how can developing oneself benefit a business?

Activity 1d: What Would You Say?

Part of your role as a coach is to encourage a growth mindset in your clients. Working with your partner, imagine what you might say to these clients.

1. Your client explains they have 20 years experience. Therefore, they don't need to learn or develop.
2. One of your clients says there is nothing they need to learn.
3. Your client is too busy for personal development but they agree to professional development.
4. Your client asks you to tell them what to learn.

Key points:

- Professional development is focused on the workplace. Professional development of skills in relation to your job makes you more effective in a particular workplace.
- Personal development is focused on communications, time management and things such as leadership skills. However, it may have nothing to do with your job.
- A person with a growth mindset tries to work on his or her weaknesses, seeks out opportunities to grow and improve, and believes that people who value learning are more likely to succeed.

ACTIVITY 02

Growth Mindset versus Fixed Mindset

Time: 50 minutes

By the end of this activity you will be able to explain the difference between a growth mindset and a fixed mindset and will have practice in encouraging a person with a fixed mindset to embrace change.



Activity 2a: Definitions of the Two Mindsets

Look at the following definitions. Which is a definition of a growth mindset and which is a definition of a fixed mindset?

The belief that innate abilities are static and cannot be developed. It leads to a desire to look smart, a tendency to avoid challenges, give up easily and see efforts as fruitless.

The belief that personal success is due to hard work and learning. It leads to a desire to learn, a tendency to embrace challenges and learn from criticism and ultimately, greater success!

Check your answers with a partner.

Activity 2b: Characteristics of the Two Mindsets

Now study the following table. It shows the characteristics of a growth mindset and a fixed mindset in relation to success, failure, getting feedback, being challenged and attitudes.

In pairs, complete the missing parts of the table using the list of statements that follows.

	Growth mindset	Fixed mindset
Success is:	Stretching themselves to become smarter	1.
Failure is:	2.	A setback, like getting fired, or failing a test
Feedback:	Pays attention to feedback and areas for improvement. 3.	Likes to hear positive feedback but ignores areas for improvement. 4.
When challenged:	Sees areas for learning	5.
Might say:	“If I put in enough effort, I can succeed” 6. “That didn’t go well. What can I learn from it?”	“I do badly, no matter how much effort I put in” 7. “That didn’t go well. I’m a failure”

- a. Welcomes discussion of all answers, right and wrong
- b. “I can’t get any better at marketing, it’s not possible”
- c. Not growing. Staying the same
- d. “What I learn will help me improve my business”
- e. Being viewed as smart and superior, having existing abilities confirmed
- f. Sees success and failure
- g. Not interested in discovering the ‘right’ answer when they get things wrong

Activity 2c: Growth Mindset and Fixed Mindset Reactions

Now read the first half of a case study about two business people, Shamila and Kumudu, who both run beauty salons in Mirissa.

Case Study



Shamila and Kumudu each run a beauty salon in Mirissa. They used to have lots of business from tourists, but since the pandemic, this business has stopped. Before, they didn't need to market their business because foreigners would walk past and find them. Now, business is very slow.

Both have heard that there are still many foreigners who live in the area. They also know a local pizza restaurant that has been successfully marketing themselves via Instagram.

However, Shamila has a **growth mindset** while Kumudu has a **fixed mindset**.

Work in small groups. Fill out the following table about how Shamila and Kumudu will probably react to the idea of using Instagram marketing to help their businesses.

	Do they decide to give Instagram marketing a go?	How do they feel about using Instagram marketing?	If they decide to use Instagram marketing, how do they prepare?
Shamila			
Kumudu			

The trainer will now give you a handout with the second half of the case study. Read it and find out if your predictions about Shamila and Kumudu were accurate.

Activity 2d: Responding to Someone with a Fixed Mindset

Remain in your groups. The trainer will give you a sheet of flipchart paper and a marker pen.

Imagine you are Kumudu's business coach. In your groups, brainstorm and write on the paper some comments you could say to her, to encourage her to embrace the opportunities presented by Instagram marketing. (Really, you are encouraging her to adopt more of a growth mindset.)

Now, the trainer will rearrange you into pairs. In your pairs, act out a roleplay between Kumudu and her business coach discussing the use of Instagram to market Kumudu's beauty salon.

When you have finished, swap around the roles of Kumudu and her business coach and have a second discussion

Key points:

- A fixed mindset is a belief that innate abilities are static and cannot be developed. This leads to a desire to look smart, a tendency to avoid challenges, give up easily and see efforts as fruitless.
- A growth mindset is a belief that personal success is due to hard work and learning. This leads to a desire to learn, a tendency to embrace challenges and learn from criticism and ultimately, greater success.

ACTIVITY 03**Self-Awareness****Time: 40 minutes**

By the end of this activity you will be able to give examples of how self-awareness affects behaviour.

**Activity 3a: How Self-Aware Are You?**

Someone who is self-aware knows their inner world of thoughts, feelings, emotions and beliefs. In difficult situations, a self-aware person chooses how to react while the unaware person reacts automatically.

With a partner, look at the situations below. Give two reactions to each situation, an automatic reaction and a self-aware one.

1. Every day you get stuck in a traffic jam going to work for an hour. You have no choice but to travel this way. You feel so angry.
2. A colleague criticises your coaching style. You feel that it is unfair because you are a better coach.
3. After you travel many hours for a meeting with a new client, the first thing they tell you is that they think coaching is a waste of time. You feel frustrated.

Activity 3b: Reflect on These Topics

Working with a partner, share your reflections about these topics:

1. My feelings about being a coach.
2. My blind spot.
3. Who are you most careful with talking to because of the impact of your words?

Activity 3c: The Client Who Lacks Self-Awareness

Imagine you have a client who lacks self-awareness. What would the answers to the questions be?

- ✦ Does the client get on well with others?
- ✦ Is the client aware of the impact of their actions?
- ✦ Does the client understand why they act the way they act?
- ✦ Is the client very confident because they are unaware of their limitations?

In what ways might a client like this be a problem for the business they run?

Also, what are the problems if a coach lacks self-awareness?

Activity 3d: Developing Your Self-Awareness

There are many ways to develop your self-awareness as a coach. Three are listed below. For you personally, which is the most effective and why? Tell a partner.

- ✦ Method One - Using my Learning Log or a journal to reflect on my inner world.
- ✦ Method Two - Get feedback from colleagues, mentors and clients.
- ✦ Method Three - Consider “Why?” and regularly ask myself why I did what I did.

Key points:

- ✦ A person who is self-aware understands their inner world of thoughts, feelings, emotions and beliefs. In difficult situations, this sort of person chooses how to react.
- ✦ A person who lacks self-awareness tends to react automatically in difficult situations.
- ✦ There are many ways of developing your self-awareness as a business coach, for example, using a learning log or journal for reflection, getting feedback from colleagues, mentors and clients, and constantly asking yourself questions (especially “Why?” ones).

ACTIVITY 04

Values

Time: 50 minutes

By the end of this activity you will be able to identify two or more of your key values.



Activity 4a: Values

Values are the principles, qualities and standards that guide us in our life. Can you immediately say what your values are? Probably not. This is not something we stop to consider in our day-to-day lives. But values are important. They directly influence our effectiveness and impact as a person – professionally and personally.

Look at the list of some values in the word montage. Are your values there?



Diagram 12 - 4a: Values

Activity 4b: Why Are Values Important?

In the examples below, the person's values are not aligned with the work they are doing. Working with a partner, fill in the blanks with the correct values from the following list.

- ◊ Independence
- ◊ Collaboration
- ◊ Authenticity

- a. Somy values _____. However, at work, Somy has a negative outlook because in his workplace he does not feel he can be himself.
- b. Hiruni values _____. However, Hiruni lacks motivation because she is micromanaged by her boss.
- c. Lahiru values _____. However, Lahiru is not very productive because he works alone in his workplace without any colleagues or employees to interact with.

For each case, what are the undesirable impacts of the people's values not being aligned with their work?

Activity 4c: Reflecting on Your Values

To understand your values, you must practise self-reflection. Select two values that you consider to be most important from the word montage in Activity 4a. For each value ask:

- Do I follow this value both at home and at work?
- What steps can I take to align my actions and goals more closely with this value?
- How can this value help my work as a coach?
- How has this value changed for me since I was younger? Will it change in the future?

Then work with a partner. Tell him or her your answers for the two values.

Activity 4d: Coaching With Values

As a coach, it is important to understand your core values. Living in alignment with them will feel more fulfilling and make you more effective as a coach.

Again working with a partner, develop a strategy to help you uncover your new client's core values. Also, if necessary, think of how you might help the client to adapt their values.

Here are some ideas and concepts to help you devise a strategy:

- Questions
- Observations
- Sharing
- Goals

Activity 4e: Problem Situations

In groups, discuss what would be the best thing to do in the following situations.

- a. Your client values tradition, but their hairdressing business is about new fashions. What do you suggest?
- b. Your client values a work-life balance but the guest rooms in their home mean that they are always at work. What do you suggest?
- c. Your client values harmony in the workplace but their employees are always arguing. What do you suggest?
- d. Your client values risk-taking but is afraid to make mistakes. What do you suggest?

There are no single correct answers. What happens next depends on you and your client.

Key points:

- Values are the principles, qualities and standards that guide us in our life. To understand our values, we must practise self-reflection.
- As coaches, it is important to understand our core values. Living in alignment with them will feel more fulfilling and make us more effective as coaches. Also, it's important that we understand our clients' core values and we may need to develop strategies to find out what they are.
- In a business context, problems often arise when a person's values are not aligned with the work they are doing.

ACTIVITY 05

Modes of Learning

Time: 40 minutes

By the end of this activity you will be able to compare two different modes of learning.



Activity 5a: How Do You Learn?

Work in pairs. What would be your preferred way to learn the following things? Share your preferences with your partner.

1. A new language
2. How to do something technical
3. Something mathematical
4. A new dance
5. A recipe

Activity 5b: Different Modes

Work in groups. Study the eight modes of learning listed in the table below. Discuss the learning styles described for them in the second column. Make sure you understand what each mode of learning involves.

Then discuss what the benefits are for each of the learning modes. Write your ideas in the third column.

Mode of learning	Learning style	Benefits
1. Independent	Learn individually	
2. Discussion	Learn through talking	
3. Collaboration	Learn with others	
4. Feedback and reflection	Learn about learning	
5. Explicit	Learn from an expert	
6. Guided	Learn with an expert	
7. Demonstration	Learning by being present and watching	
8. Experiential	Learning by making, investigating, exploring	

Activity 5c: Helping Your Client Learn

It is part of your job as a coach to help your client learn what they need to learn.

After reflecting on how you learn, go through the same steps thinking about your client. In your Learning Log, you might want to note any learning challenges that your client is facing.

Here are some problematic situations. In the groups you were in for Activity 5b, discuss – what would you as the coach recommend?

1. Your client owns a small hotel. With a friend, he is trying to learn how to use the Microsoft Excel programme. But he is making no progress. You have observed that he gets easily distracted.
2. Your client is a tour guide and for that reason, she wants to improve her language skills. She is working hard at this by herself. However, she doesn't seem to be making much progress. You have observed that she works best in a group.
3. Your client owns a small hotel and he is trying to give his employees coaching and training. He has read some books about how to do this, but he finds it very hard. What technique would you recommend?

There are no single, right or wrong answers, but you should be able to give reasons for the answers you come up with.

Key points:

- ✦ Learning occurs in different ways. Different people prefer listening, note-taking, discussing, watching demonstrations, etc. As a coach, you need to consider the ways in which your clients learn best and tailor your coaching practices to suit those.
- ✦ Learning can be independent, collaborative, explicit, guided or experiential, or involve discussion, demonstration or feedback and reflection. Each mode has different benefits and is suited to learning in particular contexts with particular goals.
- ✦ Part of your job as a coach is to help your client learn what they need to learn. Reflect on how you learn and go through the same steps thinking about how your client learns.

ACTIVITY 06

Your Client's Learning and Growth Needs

Time: 30 minutes

By the end of this activity you will be able to identify your client's learning and growth needs and give reasons for their importance.



Activity 6a: True or False?

Why is ongoing learning important for clients? Work with a partner and decide whether these statements about ongoing learning are true or false.

	True	False
A. Effective coaching should inspire a willingness to learn and try new things.		
B. Self-development only helps a client in their personal life.		
C. Effective coaching should help clients to see new opportunities and gain greater self-awareness.		
D. It is often impossible for a coach to encourage a growth mindset in clients.		
E. Encouraging your clients to engage with continued learning will help them develop as leaders and business professionals.		
F. Ongoing learning is unimportant for entrepreneurs and small business owners because they are not part of a large organisation.		
G. Entrepreneurs often don't understand what their learning and growth needs are. As a coach, you can help them fill this gap.		

Module 13

Advancing as a Business Coach



3 hours



Module Aims: By the end of this module you will be able to...

1. Limit misunderstandings between yourself and your clients.
2. Identify potential areas of conflict in order to reduce and manage them.
3. Encourage reluctant clients
4. Monitor and evaluate your progress on the coaching journey.

Module 13:

Advancing as a Business Coach

ACTIVITY 01

Limiting Misunderstanding

Time: 30 minutes

By the end of this activity you will be able to limit any misunderstandings between yourself and clients.

Activity 1a: What is Communication and What is Misunderstanding?

Remembering what you studied in the Communication Skills module your group should agree on and write a definition of the word 'communication' here.

Activity 1b: Say It or Write It? The Medium of Communication.

Below you will see the advantages of writing, e.g. emails, to communicate with clients, on the one hand, and the advantages of talking with clients face-to-face or by phone, on the other.

Your group should identify and write any disadvantages that could cause **misunderstanding** from written communications and the same for spoken communications.

Advantages of written communications	Disadvantages that could lead to misunderstanding
There is a written record of what is communicated.	
Complicated information can be given and understood better.	
Better for making sure the right words are used.	
Information can be corrected by re-writing.	

Advantages of written communications	Disadvantages that could lead to misunderstanding
Emails can be sent and read at any time and maybe less inconvenient than phone or face-to-face communication. It may be quicker than a meeting.	
May be quicker than a meeting.	
Immediate - no delay.	
More 'human' and 'sociable.'	
Can be more persuasive.	
Immediate feedback can be given and received.	
Misunderstanding can be corrected at the time.	
Useful discussion possible.	
Good new ideas can come during discussions.	
Body language helps the speakers understand each other.	
You can ask for clarification.	

Key points:

- ✦ Causes of misunderstandings include the choice of words, the tone, our perception of the speaker / writer or their intentions, the wrong medium.
- ✦ Some things are best communicated by speaking, especially if they are sensitive, others in writing, especially if care needs to be taken over the words used.
- ✦ The client can misjudge which medium to use – the coach should not.

ACTIVITY 02**Managing Conflict****Time: 30 minutes**

By the end of this activity you will be able to identify potential areas of conflict between yourself and your clients in order to reduce and manage them.

Activity 2a: Proactively Foreseeing Potential Areas of Conflict.

Imagine that the coach is an experienced businessperson from Colombo 7 and the client is the owner of a B&B or guest-house or small hotel in a rural town in the south such as Ambalantota or Tissamaharama. Looking at the Coaching Journey below, can you identify two steps in which the coach and client might disagree? What might they disagree about?

1. Prepare and Plan:

Plan for your coaching process and research your client and their business sector.

(Good research into the specific business and the general context saves time and makes you look knowledgeable / well prepared, which will increase the client's confidence)

2. Set the Tone:

During your first meeting, get to know your client, create good rapport and win your client's trust.

(This also sets boundaries and makes the relationship clear. This will save time and avoid uncertainty)

3. Lay the Foundation:

Explain your credentials, how the process of coaching works, the style of delivery, roles of coach and client.

(This also helps save time. It means you can concentrate on work, without dancing around each other)

4. Negotiate, Agree and Sign a Coaching Contract:

Agree on the terms of operation, set boundaries, responsibilities, times of meetings, action points, number of goals, etc.

(While you need to allow flexibility, this will keep your work with the client focussed, which is to his / her benefit)

5. Assess the Client's Current Business Situation:

You may need to use different business analytical tools to ascertain the situation.

(This needs to be collaborative, which shows you are not a dictator. You want to help the client see through the trees)

6. Decide on Goals:

Find out from the client what they are hoping to get from this coaching and where they would like to be at the end of the coaching.

(So that there is clear purpose)

7. Look for Options:

Evaluate the advantages and disadvantages of the number of options available.

Don't just grab at the first ideas. Explore options fully with the client. We want what is best for the client, and the first option isn't necessarily the best)

8. Set SMART Goals:

Work with the client to set SMART goals with clear action points. Set realistic actions with achievable time frames for them.

(They need to be SMART, so it is clear if they have been achieved or not)

9. Follow Up and Review:

Meet the client to review action points. If they haven't been achieved, support the client to reach them or revise action points. This may take a number of sessions which may be used monitoring, performance updates, tackling new problems that arise, with the objective of moving closer to your client's goals.

(It is an ongoing process, and the coach needs to show responsiveness to changing circumstances while keeping an eye on the big picture)

10. Final Evaluation:

This is a wrap-up session at the end of the coaching process to review and solidify what the client gained from their coaching experience and to set them up for life 'post-coaching'

(So that the client can move on to the next [unsupported] stage, and recognise what has been accomplished)

Activity 2b: Managing Conflicts

Here is a list of Dos and Don'ts when handling conflicts or disagreements in any culture.

✔ Do	✘ Don'ts
Put yourself in the other person's shoes. Be kind.	Stop communicating.
Communicate clearly and professionally. Actively listen.	Lecture.
Confront the situation, not the person. Stay calm.	Blame.
Take a break to let people clear their heads.	Allow your emotions to make the situation worse.
See both sides of the argument.	Threaten.

Now imagine the Sri Lankan businessperson from Colombo 7 is going to meet their Sri Lankan client in the town in the deep south to resolve one of the disagreements you identified in 2a. The businessperson has come to ask your advice on how to make sure the meeting is a success. What advice would you give?

Key points:

- Coaches talk to clients about complex issues and help them make important decisions, so disagreements may well arise during the coaching journey.
- But conflict can be an opportunity for both client and coach to learn and develop.
- That is why being able to handle conflict effectively is such an important coaching skill.

ACTIVITY 03**Reluctant Clients****Time: 60 minutes**

By the end of this activity you will be able to encourage reluctant clients.

Activity 3a: Non Engaged Clients

A non-engaged client is one who seems to be losing interest in the coaching and not completing tasks. Your job as a coach is to get the client fully involved in the coaching again

Use this **Three-Step Process** to do this:

- ✦ **Step 1:** Identify the causes of the non-engagement
- ✦ **Step 2:** Challenge these causes sensitively
- ✦ **Step 3:** Agree a solution – “What can we do to get you committed to the coaching again?”

You will practise this process in a Role-play One. The trainer will give you instructions.

Activity 3b: Clients With Limiting Beliefs



Limiting beliefs are opinions that we cannot achieve our goals. They are too difficult, we are not good enough, there's not enough time, not enough money and various other reasons.

Your job as a coach is to overcome these beliefs using the **Three-Step Process**:

- ▶ **Step 1:** Identify why the client has these beliefs
- ▶ **Step 2:** Challenge the beliefs sensitively
- ▶ **Step 3:** Agree a solution – “What can we do to get you to achieve your goals?”

You will practise this process in another Role-play Two. The trainer will give you instructions.

Key points:

- ▶ During the coaching journey, some clients may start to engage less and want to avoid meeting their coaches.
- ▶ If this happens the coach cannot ignore it but must find out why interest is weakening.
- ▶ Clients need to be held accountable for taking agreed actions.
- ▶ Similarly, if clients start talking about why they can't achieve agreed targets, it's the coach's job to find out why they have developed limiting beliefs and turn negative mindsets into positive ones.

ACTIVITY 04

Evaluating Your Coaching

Time: 60 minutes

By the end of this activity you will have identified ways to monitor your progress during the coaching journey.

Activity 4a: Self-Evaluation

As a coach you must continually improve in order to give the best service to your clients. This includes self-reflection after each coaching session

- › Identify your strengths and weaknesses
- › Identify areas for improvement
- › Track and monitor your performance
- › Plan your coaching sessions better
- › Motivate yourself, as you see how you are improving over time

Practise by evaluating this training session and yourself as a participant.

Today's session	Your evaluation
Which activity worked well for me in this session?	
Which activity worked less well for me?	
One thing I did really well as a participant during this session was...	
What could I do better or differently as a participant in future sessions?	

Activity 4b: Asking Your Client for Evaluation

Asking your client for evaluation gives you useful information for improving your services.

How satisfied are you with.....?

How useful was

How much have I helped you.....?

Multiple choice method:

How satisfied are you with my help so far?

(Five choices)

- ⦿ Very satisfied
- ⦿ Satisfied
- ⦿ Neither satisfied nor dissatisfied
- ⦿ Dissatisfied
- ⦿ Very dissatisfied

(Four choices)

- ⦿ Very satisfied
- ⦿ Satisfied
- ⦿ Dissatisfied
- ⦿ Very Dissatisfied

How useful has my coaching been so far?

(Five choices)

- ⦿ Very useful
- ⦿ useful
- ⦿ Not sure
- ⦿ Not very useful
- ⦿ Not at all useful

(Four choices)

- ⦿ Very useful
- ⦿ Useful
- ⦿ Not very useful
- ⦿ Not at all useful

Rating scale method:

How satisfied are you with my help so far? (Five choices)

5 4 3 2 1 (Five choices)

Satisfied - Dissatisfied

How useful has my coaching been so far? (Five choices)

4 3 2 1 (Four choices)

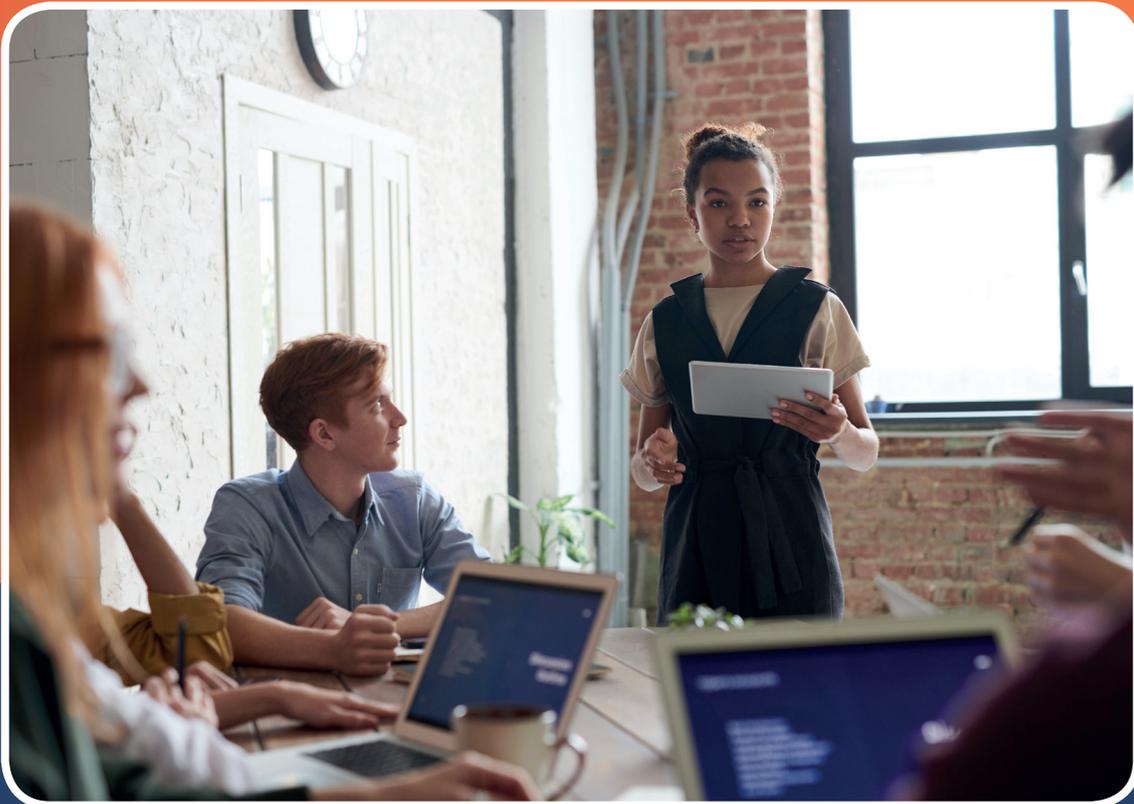
Useful - Not useful

Module 14

Developing Your Coaching Practice



5 hours 40 minutes



Module Aims: By the end of this module, you will be able to...

1. Plan to set yourself up as a coaching business.
2. Make decisions on how to brand your business.
3. Make decisions on how to price your services.
4. Plan how to market your services.
5. Identify networking forums to market your services.
6. Carry out continuous professional development

Module 14:

Developing Your Coaching Practice

ACTIVITY 01

Setting Up as a Coaching Business

Time: 1 hour 15 minutes

By the end of this activity you will be able to make decisions about how to establish your coaching business.

Activity 1a: Partnership

An early decision will be whether to establish the business alone, or in partnership with one or more other coaches.

In your three teams – the Blue Team – the Green Team and the All Blacks - write down what would be the advantages and disadvantages of partnership?

Advantages	Disadvantages

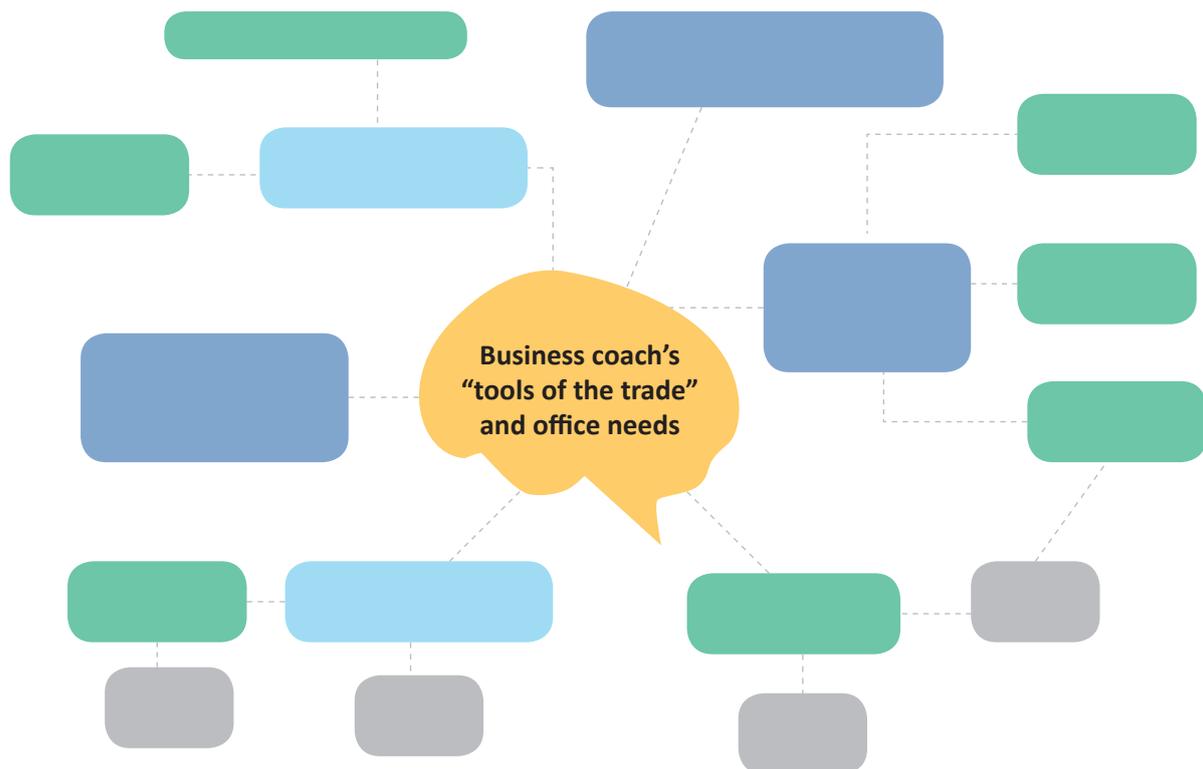
Activity 1b: Tools of the Trade

Question 1

A carpenter has a fairly well-known set of tools? What are these? Give suggestions to your trainer.

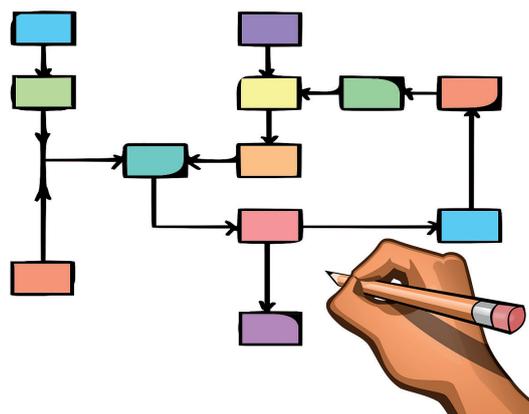
Question 2

And what about a business coach? In your three teams, create a mind map on the flip chart your trainer will give you. In the middle of the mind-map write the words Business coach's "tools of the trade" and office needs



Activity 1c: The Steps of Setting Up Your Business

In your three teams, brainstorm what are the steps of setting up a coaching business. Think of the tools of the trade, as well as a bank account, registrations, possible partnerships and everything else that you think you need to do. Put the steps in order in a flowchart. Display them on a flip chart.



Key points:

- ✦ A coach must have the tools and software needed to manage several coaching programs at the same time.
- ✦ A reliable calendar management and reminder system must also be set up.
- ✦ There needs to be a structure for tracking information on your clients.
Not least, make sure you have a reliable system for receiving payments – on and off-line.
- ✦ Not least, make sure you have a reliable system for receiving payments – on and off-line.

ACTIVITY 02**Building Your Brand****Time: 5 hours 5 minutes**

By the end of this activity you will be able to make decisions on how to brand your business.

Activity 2a: What Makes a Strong Brand?

You can see the names of those seven steps below, listed A - F. In the table below you can see the descriptions of the seven steps.

First connect the right names with the right steps – put (A) to (F) against the Descriptions (two have been done for you to get you going). Then put the steps into a logical order, which is the first step, which is the second (one has been done for you)...

Names of the seven steps	Step number (which is 1st, 2nd , etc.)
A. Get organised	
B. Identify who your ideal coaching client is	
C. Become visible	
D. Identify what you do as a coach	
E. Start pitching	
F. Identify who you are as a coach	1
G. Build your website	

Names of the seven steps	Step number
Set up social media profiles for your business coaching. Increase your visibility by connecting with people who could become clients. LinkedIn is a good place for this and facebook is very popular in Sri Lanka. Look also for sites and networks specific to the sector or area that you will be coaching in.	
Gather the tools and software you need to run your business. Get a strong calendar management and reminder systems in place. Have a system for tracking information on your clients. If you will receive payments online, set this up.	A
Find your USP (unique selling proposition). How does your experience, expertise and skills make you different from others? Focus on helping clients in businesses in sectors you know well. As you gain skills and experience you may choose to continue this, or to diversify.	F
Your site should give people an idea of who you are, what you offer, why you offer it and who you help. Ask yourself: Who is my target audience? What are their problems? What solutions do I offer? What questions do they have, and how can I answer them? A website doesn't need to be expensive. There are many providers that charge minimal fees to create and host a site.	
Identify who you help and what you help them with: what areas can you support your clients in? What areas can you not support clients in? Be clear on the areas where you cannot help clients, and exclude these from your offerings accordingly. Don't try to cover it all.	
Perfect your 'elevator pitch' - a concise description of who you are and what you do that hooks people in. Network and connect with people who may be interested in your coaching services. Post about your services on social media and your blog (if applicable). Set up a monthly email newsletter that shares testimonials and case study success stories. Consider other ways to generate a buzz about your services, such interviews or hosting a podcast.	
Who do you want your number one client group to be – your best coaching client? You may also like to identify a secondary group that you would also like to help. For example, your primary group may be large hospitality businesses, while your secondary could be family run homestays who can't afford your normal fees. Create a targeted brand statement for your ideal client is and what you can do for them	

Activity 2b: Promoting Your Offer

Question 1

Look at these two fliers sent to hotels advertising coaching. In your teams, discuss what is the problem with each?

BUSINESS COACHING
Better Call Paul!



'BUSINESS COACHING!
Better Call Paul!

Better Call Paul for all your needs in managing and/or improving and/or setting up your business in any field in tourism and hospitality! Do you want coaching on finance and/or premises and/or human resources and/or systems and/or food and beverages and/or anything else! Paul has been in this business for 35 years and can help you so much!



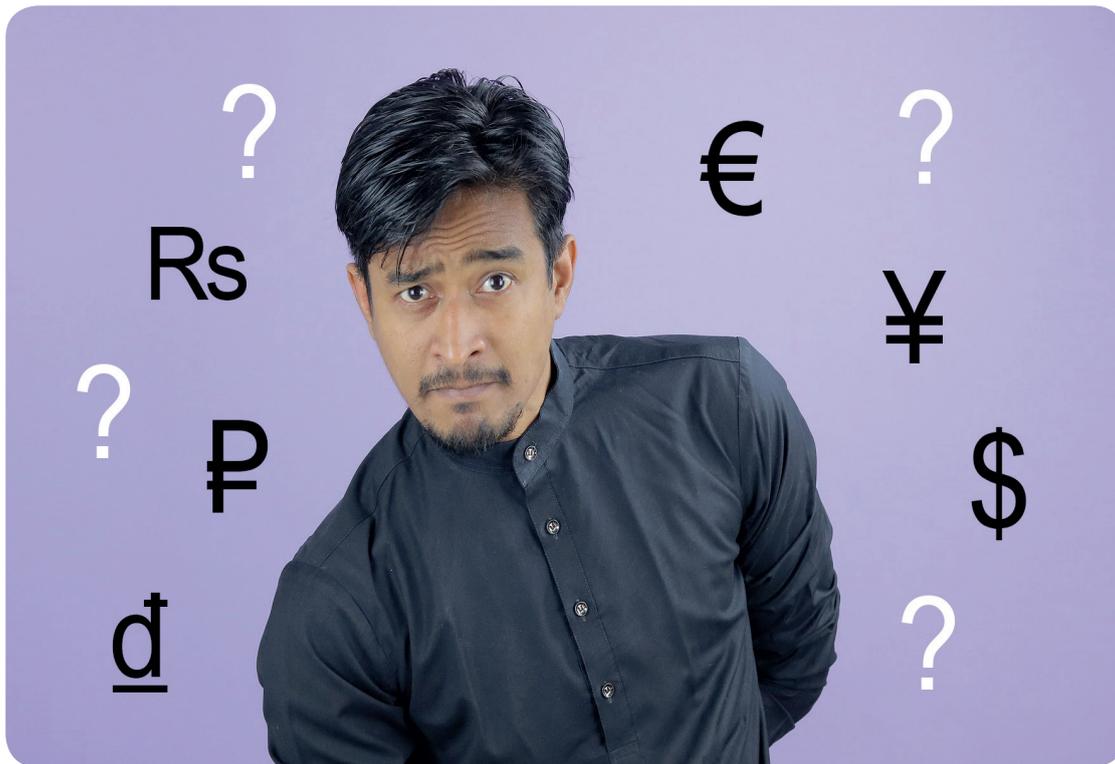
Question 2

In one of the fliers we looked at the coach seems to be promising the earth. You are a coach, not an expert in every field in the tourism and hospitality field. Consider the following clients. Can you solve their problems? If not, what can you suggest? Discuss in your teams.

1. Client A has a homestay. There is a large garden, but no shady area. Guests have commented that they would like somewhere cool to sit outside. Client A asks you what to do.
2. Client B has a spice garden. She is thinking of making and selling products (jams, chutneys, biscuits, etc.) made with some of the spices she grows. She wants to know what she should make.
3. Client C arranges tours, including bird watching tours. His guides don't know the names of all the birds, and certainly not in English. Can you teach them, he asks.

ACTIVITY 03**Pricing****Time: 50 minutes**

By the end of this activity you will be able to make decisions on how to price your services.

**Activity 3a: Competitor Analysis**

One way to decide on price is to ask 'what do other people charge'? Discuss these three questions in pairs.

1. How can you find this out?
2. What useful information does this give you?
3. What are the drawbacks of this focus on competitors?

Activity 3b: Approaches to Pricing

Here are passages about different approaches to pricing, with words missing. In pairs, can you fill the blanks with words from the box at the end? One word per blank.

- A. (1) _____ billing. This is the simplest way to bill clients. It can be useful if you have no idea how (2) _____ a project will take. It's very simple to calculate, but you need to have very good (3) _____ keeping. Your pay is capped by the number of hours you (4) _____ and the focus is put on process rather than (5) _____. It is usually best to move on from this kind of pricing fairly early, but it can work for small 'taster' pieces of work as you build up your (6) _____.
- B. Retainer agreements. This can be suitable when you have built up (7) _____ with a client. The client pays you a flat (8) _____ every month. This gives predictability about your (9) _____, but you have to be careful not to let the client (10) _____ too much! You have to be (11) _____ about who can contact you, when, and how. You also need to be clear about what will be covered.
- C. Productised services. This can be suitable if you have a (12) _____ set of products to offer, 'popular offerings', because then you can offer standardised (13) _____. Because the basic format is the same, the time and (14) _____ involved are also known. This could cover an hour or two, or be a longer (15) _____, say six months plus.
- D. Pay for (16) _____. This can be high risk, as if your client doesn't see improvements, you get nothing! But if you succeed, and have calculated well, you can have a great payday! You need to be able to (17) _____ results of course, so (18) _____ objectives are VERY important.

business / reputation	work / spend	Trust
rate / amount / fee	Income	Results
Long	Hourly	Record
clear / specific	demand / take	effort / work
pricing / fees	outcomes / products	SMART
period / time / commitment	Standard	measure/calculate

Activity 3c: Covering Costs and Generating a Profit

To decide your price you need to make sure all your costs are covered, and you are making some profit. So, what are your costs?

Now make a very rough calculation of your total costs – at home and work - per month or year.

Add up your daily costs – your utility bills – taxes – school fees – clothes – insurance etc. Don't worry about getting this accurate – make it all up if you like!

Costs

When you have calculated your costs, you need to work out what is the minimum hourly rate you must charge your clients to just cover them.

Imagine you will spend 40 hours in one week on a coaching project but let's say only **10** of those will be '**billable**' – in other words the ten hours that you have actually spent with your client: the 'contact' hours. (The rest may be on preparation, travel, etc.)

First, work out your **costs per week**: _____

Then divide your costs per week by the 10 billable hours: _____
(That is the lowest rate you can charge your clients to cover your costs.)

From this you can work out retainers or packages. Now discuss in pairs what your pricing policy might be – referring to the three approaches to pricing in 3b.

Key points:

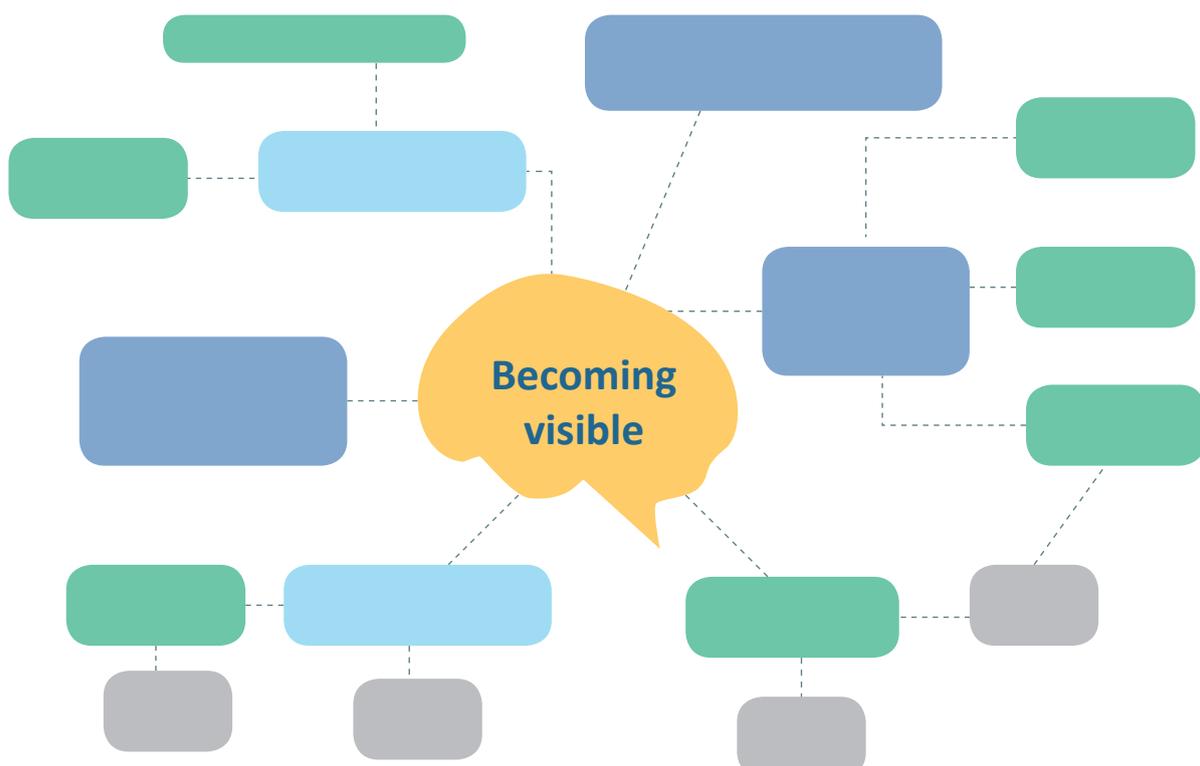
- › Setting your fees for business coaching is not scientific, it is down to your personal approach.
- › As you gain experience, it will become easier for you to decide how much to charge.
- › In coaching, it is more common to set your price based on the value you provide, rather than for the time taken.
- › And the bottom line is - it depends on what the client is willing to pay.

ACTIVITY 04**Marketing****Time: 50 minutes**

By the end of this activity you will be able to plan how to market your services.

Activity 4a: Becoming Visible

In your teams, brainstorm and write a mind map on a flip chart of all the possible ways that you could use to make yourself visible to potential clients. Start it with the words 'Becoming Visible' in the centre of the mind map.



ACTIVITY 05

Networking

Time: 1 hour 10 minutes

By the end of this activity you will have identified suitable networking forums to market your services.

Activity 5a: Networking Forums

Networking is important to keep you visible to your clients. There are online and offline (face to face) networking opportunities.

In your teams, fill in the table with two or three online and two or three face to face forums. What opportunities could you gain from each?

Online	Benefits
Offline	Benefits

Which online forum offers the best opportunities, do you think? And what face to face networking events would it be worth your while to tap into?

Activity 5b: LinkedIn



LinkedIn can be great for learning, and for selling. Firstly, get yourself a great 'headline', short and descriptive. Be active in groups, not just your group. Use analytics to better define your audience, and what attracts them. And post content. This can include video content.

Question 1

Think of a film you have seen and enjoyed, or not enjoyed, of someone telling you how to do something. It could be cooking, or building a wall, or fishing, or knitting, or writing a business plan.

You could have seen it on YouTube, or the TV, or in a club or society, or at work, or on a training course.

1. What was the film about? Who made it? When and where did you see it?
2. Did you like the film? – why / why not? Did you learn from the film? - why / why not?
3. Is there a lesson there for any film or short video clip you may post?

Question 2

Your team should now make a two minute video. Use phones or tablets to do this.

First you have 15 minutes to plan, script and practise the video. The content is up to you; it could be a coach talking to a camera. Or it could be a scene of a coach talking to a client. It could be very straightforward and serious, or it could be jokey in style. What would be likely to attract new customers?

Then you have 15 minutes to make the video, which includes making it, watching it, remaking it, watching it again.

Be ready to play it back on a lap-top for the whole class so the other teams can watch it (which means you need a good video!).

Key points:

- ◊ Use organic marketing to grow your business through your website and social media pages instead of paying for advertising.
- ◊ Social media marketing is the digital space way to attract loyal followers and potential clients.
- ◊ Organic marketing will not give immediate results, like a paid advert on facebook, but it is a very effective way to reach clients and create lasting brand awareness.

ACTIVITY 06

Continual Professional Development

Time: 40 minutes

By the end of this activity you will be able to plan and prepare for continuous professional development.

Activity 6a: On the Job Learning

Read through the following points and questions, making notes as you go:

1. Note down two or three things that you have learned on the job from your previous work experience. What did you learn and how did you learn it?

2. Now identify two or three things you want to develop as a coach by learning on the job; things that you know you will learn best through work experience.

3. Sharing experience and asking someone else 'what would you have done?' or 'how do you think I should handle that?' is useful, especially when support is mutual. How can you get this sort of peer support?

Now, with a partner, compare your thoughts.

Activity 6b: The Continual Professional Development Cycle.

The diagram below shows the CPD cycle

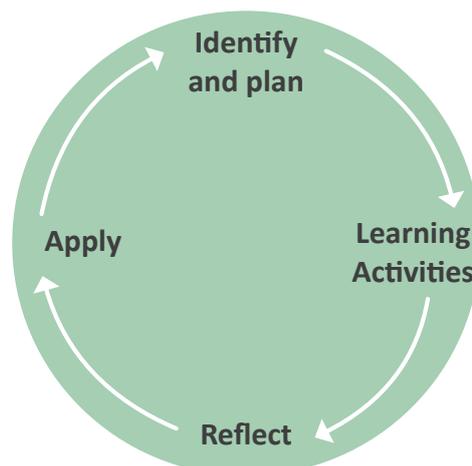


Diagram 14 - 6b:
The Continual Professional
Development (CPD) Cycle

1. Identify gaps and plan:

Identify any gaps in your skills or knowledge that you need to fill by learning off the job. Then decide how you can learn or develop those skills.

What activities are there to develop that skill? They could be formal, such as taking a course, or informal, such as reading up on a subject you wish to know more about. The internet offers many innovative and excellent ways to learn, access materials, and take online courses, even for free.

Make notes here and then discuss with a partner.

2. Carry out learning activities

Implement your plan.

3. Reflect on your learning

Evaluate the learning experience – the training or coaching or reading – did it succeed in filling the gap? Do you need to do more to fill this gap?

Reflect on this coaching training that you are doing now. Discuss with your partner how much it has helped you develop coaching skills? Is it going to be enough? What else should you do to become even better as a coach?

4. Apply your new learning

Knowing is one thing, but putting it into action is what counts. Practice is fundamental to improvement.

Discuss with your partners **one** specific skill or knowledge you have learned on this course that you will apply in your coaching work. What is this skill or knowledge and how exactly will you apply it?

Key points:

- ✦ A coach needs to keep up to date on the latest techniques in order to deliver relevant and valuable coaching in a way that better serves their clients.
- ✦ Professional development takes commitment: it is something you are always investing in and dedicating time to.
- ✦ CPD takes many forms – attending workshops, formal training courses, observations, reading articles, books, blogs, listening to podcasts, on the job learning – but it should be self-motivated and self-directed.

Module 15

End of Course Simulation, Reflection and Assessment



5 hours 30 minutes



Module Aims: By the end of this module, you will be able to demonstrate you meet the following assessment criteria:

1. Display genuine interest in the client, and are respectful and empathetic and strive to reach a mutual understanding.
2. Demonstrate the required level of knowledge of business coaching in tourism sectors.
3. Utilise the requisite foundation level coaching skills to operate effectively under coaching supervision.
4. Demonstrate good practice by internalizing the values as set out in the Code of Ethics and seek ways to support equality, diversity and inclusion for clients.

Module 15: End of Course Simulation, Reflection and Assessment

ACTIVITY 01

Introduction and Review of Learning Logs

Time: 35 minutes

By the end of this activity you will have an overview of the activities in today's module and will have identified the best lessons recorded in their learning logs.



Activity 1a: Introduction to the Module

Today you will be:

- ◊ Reflecting on what you have written on your learning log sheets.
- ◊ Preparing and giving a group presentation based on a case study.
- ◊ Taking part in a role-play using the same case study (though at a later point in the coach-client relationship).
- ◊ Doing a short, end-of-course test.
- ◊ Doing some more reflecting on what you have learned in the course.
- ◊ Offering feedback to the trainers about the course.
- ◊ Looking forward to the practical part of the course.

Do you have any questions about what is coming up today? If so, you can ask the trainers now.

Activity 1b: Complete the Sentences

For this first task, you need to consult the self-reflection learning log sheets you have completed during the course.

In your learning log sheets, find an observation you have made or an example you have described that allows you to complete each of the following sentences. Based on each entry, write an ending to each sentence about what you have learned or about what you have asked yourself.

1. This taught me that it's good to _____

2. This taught me that it's unwise to _____

3. This made me ask myself if _____

When you have completed the three sentences, work with a partner. With your partner, compare what you have written.

Each time, quickly describe the entry you picked from the learning log and tell your partner about what it has taught you or what it has made you ask yourself.

Activity 1c: Mingle and Describe Your Biggest Lesson

Now choose from the three sentences you wrote for Activity 1b the one that describes the biggest lesson that, in your opinion, you have learned during the course.

Stand up, move around the room and mingle with the other course participants. Each time you speak to another person, do the following things:

- ◆ Tell the person your sentence about your most important lesson.
- ◆ Answer any questions the other person might have about that lesson.

ACTIVITY 02

Group Presentations

Time: 2 hours

By the end of this activity you will have studied and discussed case studies of possible new clients, analysed and evaluated the clients and drawn up action plans for their coaching journeys, presented your action plans and received feedback on them.



Activity 2a: Case Studies

The trainers will divide you into groups of four. Each member of each group will receive a handout, which contains a case study.

Read your case study and think about it individually. Then discuss your first impressions of the client and business described in the case study with the rest of their group-members.

Activity 2b: An Initial Evaluation and Analysis

The trainers will now give each group an initial evaluation / analysis form to fill in about the client and business described in the case study. It covers both business-related factors:

- ◇ Possible SMART objectives
- ◇ Possible ways to measure performance (KPIs, maybe OPIs or BEIs)
- ◇ Possible data collection and data analysis methods

Also, it covers personality-related factors regarding the client:

- ◇ Possible ethical considerations
- ◇ Appropriate leadership styles
- ◇ Possible challenges
- ◇ Growth mindset considerations

Discuss and complete the form as a group. You have a strict **20-minute** time limit for this.

Activity 2c: An Action Plan

After your group has completed the initial evaluation / analysis form, the trainers will give you a second form to fill in about the case-study client and business. This is an action plan where your group must come up with initial proposals for what to do, by when, and skills, investment and other resources that might be needed.

Again, there is a strict **20-minute** time limit for this.

Activity 2d: Prepare Your Presentation

Now, in your group, using the case studies, the initial analysis / evaluation forms and the action-plan forms, prepare a short presentation. In the presentation you must introduce the client, give an evaluation of their current situation and say what you plan to do with this client during the coaching journey and why.

The trainers will give you a sheet of flipchart paper, a marker pen and some Blu-tack to prepare the presentation with.

For this task, there is a strict **15-minute** time limit.

Activity 2e: Deliver Your Presentation

Now, in your group, deliver your presentation to another group.

The other group has prepared a presentation about a **different** case study and they will also give their presentation to you. Listen to it carefully and ask some questions to the group afterwards.

Activity 2f: Prepare Feedback for Another Group

Now the trainers will give your group the initial evaluation / analysis form and action-plan form from a different group. This group completed the forms about the **same** case study that your group did.

In your group, assess the other group's materials. Also, individually, make some notes about the materials in the following table. What good observations did the other group make about the client? What good ideas did the group have for action to take? Were there any things that your own group didn't think of? On the other hand, what suggestions would you make to the other group about observations and ideas that they missed?

	Good points	Suggestions for improvement
Evaluation / analysis form		
Action plan form		

Activity 2g:

Now the trainers will pair you off with a participant from the group whose materials you have just assessed.

For five minutes, give your partner feedback on their group's observations and ideas. Your partner will also spend five minutes giving you feedback on your group's materials.

ACTIVITY 03

Role-plays

Time: 1 hour 30 minutes

By the end of this activity you will have played a coach in a role-play, been assessed and given feedback on your performance.



Activity 3a: Prepare for a Role-Play

Remain in the same groups that you were in during Activity 2.

Each group has four members – A, B, C and D. For this task, each member receives a different handout. On each handout are two role-play descriptions, one for a coach and one for a client.

Imagine that the coach and client, whom you discussed, analysed and made plans for in Activity 2, have now begun their professional relationship. However, things are not going according to plan; not yet, anyway.

In your roleplay description for the **coach**, you will see that the client's business has, so far, not reached the standards expected of it.

In your roleplay description for the **client**, you will see reasons why some expected standards have not been reached. These are reasons that the coach is not yet aware of.

From these cards, prepare what you will say at your next coaching meeting – as the coach in one meeting and as the client in another meeting.

When you play the coach, you will be observed. Therefore, it's a good idea to make some notes about what you will say as the coach.

Activity 3b: Take Part in Two Role-Plays

The trainers will set up four role-plays for each group.

However, before that, you will receive two copies of an observation form. During the two role-plays in your group that you do **not** take part in, you should observe the role-play and fill out the form about the person in the role of the coach.

For a minute, read what's in the observation form.

Now conduct the following role-plays, with two group-members observing how the coach behaves each time.

- 1. Group-member A** (the coach) speaks with Group-member B (the client).
Group-members C and D observe.
- 2. Group-member C** (the coach) speaks with Group-member D (the client).
Group-members A and B observe.
- 3. Group-member B** (the coach) speaks with Group-member C (the client).
Group-members A and D observe.
- 4. Group-member D** (the coach) speaks with Group-member A (the client).
Group-members B and C observe.

Each role-play should last for about **10 minutes**.

ACTIVITY 04**End-of-Course Test****Time: 35 minutes**

By the end of this activity you will have completed a multiple-choice test about input delivered during the course.



Make sure you are sitting apart from the other participants and have a pen.

The trainers will give you a handout containing a short test. This consists of some questions and multiple-choice answers. You should circle what you think is the correct answer each time.

You have **30 minutes** to do the test.

ACTIVITY 05**Reflection****Time: 20 minutes**

By the end of this activity you will have reflected on your learning journey during the course.



The trainers will divide you into two groups and arrange you so that each person in one group is facing one person in the other group.

One of the trainers will read out a question about the course you have just done. For three minutes, discuss the question with the person you are facing in the other group.

After three minutes, you will be moved so that you are facing another person in the other group. The trainer will read out another question about the course. Again, for three questions, discuss this new question with the new person you are facing.

Keep doing this until you have discussed five questions with five different people.

ACTIVITY 06

Feedback on the Course

Time: 30 minutes

By the end of this activity you will have provided written feedback on the course you have just completed.



Participant Workbook

References

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Module 2: Basics of Business Coaching	
IAC ethical principles	https://certifiedcoach.org/about/ethics
Module 4: Managing Change	
Change model - Scott & Jaffe	https://expertprogrammanagement.com/2018/05/scott-and-jaffe-change-model/
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Module 5: Diversity and Inclusion	
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Identifying social inclusion and exclusion	https://www.un.org/esa/socdev/rwss/2016/chapter1.pdf

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The business case	Accenture, Getting to Equal: The Disability Inclusion Advantage, https://www.accenture.com/t20181029T185446Z_w_us-en/_acnmedia/PDF-89/Accenture-Disability-Inclusion-Research-Report.pdf
Resistance	VicHealth (En)countering resistance https://www.vichealth.vic.gov.au/-/media/ResourceCentre/PublicationsandResources/PVAW/Encountering-Resistance-Gender-Equality.pdf

Topic	Reference
Module 6: Communication Skills	
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Pie-chart - time spent communicating	<i>Based on the research of: Adler, R., Rosenfeld, L. and Proctor, R. (2001) Interplay: the process of interpersonal communication (8th edn), Fort Worth, TX: Harcourt.</i>
Body language	https://coachingandthejourney.wordpress.com
Module 7: Building Successful Relationships	
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Module 8: Key Performance Indicators	
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Module 12: Growth Mindset	
Learning how to Learn	https://www.coursera.org/learn/learning-how-to-learn
Fixed vs. Growth: The Two Basic Mindsets That Shape Our Lives	https://www.brainpickings.org/2014/01/29/carol-dweck-mindset/
The strongest predictor for success Angela Lee Duckworth	https://www.youtube.com/watch?v=GfF2e0vyGM4

International Coaching Associations

International Coaching Federation (ICF)

<https://coachingfederation.org>

Association for Coaching (AFC)

<https://www.associationforcoaching.com>

European Mentoring & Coaching Council (EMCC)

<https://www.emccglobal.org>

Worldwide Association of Business Coaches (WABC)

<https://wabccoaches.com>

International Association of Coaching (IAC)

<https://certifiedcoach.org/>

Skills for Inclusive Growth (S4IG) reports

One Step at a Time, Creating Systemic Change	https://inclusivegrowth.com.lk/wp-content/uploads/2020/02/One-Step-At-a-Time-Report.pdf
Skills that Matter! Life Changing Experiences	https://inclusivegrowth.com.lk/wp-content/uploads/2020/04/Skills-that-matters-lifechanging-Life-changing-experiences-.pdf
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Extra reading

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<https://www.universalclass.com/articles/business/basics-of-a-career-as-a-business-coach.htm>

