

Sri Lankan Hospitality and Tourism

# Professional Business Coaching Course

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# TRAINER RESOURCES

Modules 1 - 15



## 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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### Contact Person

Farheen Khurum - Contract Representative  
Scope Global  
Level 5, 12 Pirie Street, Adelaide, SA, 5000, Australia  
Tel: +61 8 7082 1431  
[Farheen.Khurum@scopeglobal.com](mailto:Farheen.Khurum@scopeglobal.com)

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Trainer Resources

# Module 1

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**What Is Business Coaching?**

All resources are A4 size unless stated / Dotted line means to cut.

Activity M1-3b-1	Handout 1 - An article about the Sri Lankan economy (one copy per participant)
Activity M1-4d-1	Handout 1 - Who do business coaches work with? (one A3 copy per group)
Activity M1-4d-2	Handout 2 - Who are business coaches? (one A3 copy for one of three groups)
Activity M1-4d-3	Handout 3 - What should business coaches not do for their clients and do they need to be experts in their clients' businesses or industries? (one A3 copy for one of three groups)
Activity M1-5c-1	Handout 1 - Maria (one A3 copy for one-third of the groups)
Activity M1-5c-2	Handout 2 - Malaka (one A3 copy for one-third of the groups)
Activity M1-5c-3	Handout 3 - Asela (one A3 copy for one-third of the groups)
Activity M1-7a-1	Handout 1 - Suresh (one copy per participant)
Activity M1-7a-2	Handout 2 - Chameera (one copy per participant)
Activity M1-7b-1	Cut-ups with the stages of the Blended Coaching Model (one A3 set per group)
Activity M1-7c-1	Cut-ups with the stages of the TGROW Model (one A3 set per group)
Activity M1-8d-1	Handout 1 - Log (one copy per participant)

**Activity M1-3b-1: Handout 1 - Article about Sri Lanka's tourism and general economies**

The Sri Lanka tourism sector saw its peak in 2018, when it attracted 2.33 million visitors who brought in US \$4.4 billion in total receipts. India, China, and the UK are the largest markets.

In Sri Lanka 404,000 people directly rely on tourism income and a further 5 million are supported indirectly through tourism. However the COVID outbreak showed the vulnerability of the informal sector.

Now the tourism sector is at a critical point. Sri Lanka's economy is transitioning from a rural, crop-based economy to a manufacturing and services-oriented urban one. Currently the nation does not have enough skilled labour.

Today the challenge in tourism is to attract more high-yielding visitors. To do this we need to enhance our standards and add value.

The enterprises along the tourism value chain have to adapt. They need to reposition themselves as quality service providers, conscious of their client needs, respectful of their employees, protective of their natural environment, and efficient with their resources.



**Activity M1-4d-1: Handout 1 - Who do business coaches work with?**

Business coaches work with entrepreneurs, owners and decision makers in different ways to help them plan and improve their businesses. Ultimately, business coaching is about increasing productivity, profitability and effectiveness. Whether directly, for example by developing new products and strategic capability, or indirectly for example through improved interpersonal relationships.



**Activity M1-4d-2: Handout 2 - Who are business coaches?**

Business coaches are typically accomplished professionals who know what it takes to make a business successful. They work alongside their clients to help them define their vision for their business, identify goals and implement strategies that will help them achieve their objectives. The coach helps their client navigate problems and challenges in the most effective way possible.



● **Activity M1-4d-3:** Handout 3 - What should business coaches not do for clients, and do they need to be experts in their clients' businesses or industries?



As a business coach you do not take decisions for clients or solve their problems for them. The role of a coach is to facilitate ways in which clients can identify goals, overcome obstacles, improve their business performance and make correct business decisions.

As a business coach you do not need to be an expert in the business or industry of your client. You bring coaching expertise that enables the client to become more self-aware and supply supportive, discovery-based approaches and frameworks.



**Activity M1-5c-1: Handout 1 - 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.



**Activity M1-5c-2: Handout 2 - 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!



**Activity M1-5c-3: Handout 3 - 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?



**Activity M1-7a-1: Handout 1 - Suresh**

My business is called Suresh's Hotel and Tours. My wife complains about this name because she says it's confusing to customers. It covers two different things, the hotel and the tours. Yet at the same time the name doesn't cover everything we do!

We started with a small restaurant – a café really – providing breakfast, lunch and dinner to local and foreign tourists. My wife prepared the food and, at some point, she started offering lessons to foreign tourists in Sri Lankan cooking. Also, we converted part of our house into guestrooms and started providing accommodation as well as meals for tourists. Hence, the 'hotel' part of our name. Meanwhile, because some foreign tourists complained about the unreliability of local tuk-tuks and vans, I started using my own vehicle to drive people around. Gradually, I started taking them on tours and some local hotels have even passed guests onto me, for day trips. Hence, the 'tours' part of our name.

Some areas of our business make more money than others, and some areas may even be losing money. I'm just too busy doing different things to investigate! Another problem is staffing. I draw on members of my extended family to help me, whenever they're available, and sometimes we have too many people working on the premises and at other times we don't have enough.

That's why I'd like to work with a business coach. I felt my business is a disorganised mess at a moment and perhaps he or she could examine it and tell me what I need to do to improve.



**Activity M1-7a-1: Handout 2 - Chameera**

I grew up in a mountainous part of Sri Lanka, started taking foreign tourists on trekking tours in those mountains, and have owned my own trekking business for nearly 10 years now. I employ 16 people, including six experienced guides, plus drivers and support staff. We organise three types of trekking tours according to levels of difficulty – easy, mild and challenging – and offer tours from one to four days. We do bird-watching tours too and can put together other tours according to request. Last year, for example, we created a trekking tour for a British historian who wanted to go around the old tea plantations.

There are two things I'd like my business coach to work on. First, with the 2019 Easter bombings and the 2020-21 coronavirus pandemic, I lost a lot of foreign customers and I realise I need to redesign my business for a more Sri Lankan market. This will mean making the tours more 'family-friendly', with less walking and more driving between beauty spots and viewpoints. I may also have to change some of my guides. They're rough, rugged guys – great company for an adventurous foreign backpacker, but maybe not for a wealthy family from Colombo!

The other thing is this. I have bought a house in a remote mountain village that would make a great eating and stopping-off place for people during walks and treks. They could have breakfast there at the start of treks and have lunch or tea there in the middle of treks. Other trekking companies could use it too – paying me a fee, of course. But that will mean hiring new staff to cook and serve food and installing new catering facilities, which I haven't had experience of before.



**Activity M1-7b-1: Cut-ups - The stages of the Blended Coaching Model**

**a.** Conducting regular coaching sessions with Suresh. These will help him to use the new skills and knowledge that are needed for the implementation of the action and skills plan. The coaching sessions might involve monitoring performances and giving feedback, identifying gaps in skills, helping Suresh to access useful business development services, etc.

**b.** Creating an action and skills plan with Suresh. This will help to monitor his business's progress and achieve results that you and he have specified.

**c.** Conducting an operational performance evaluation. In this, you will help Suresh to identify which stage of development his business is at just now, to understand the challenges his business faces, to identify key areas to improve in, and to establish targets and goals.



**Activity M1-7c-1: Cut-ups - The stages of the TGROW Model**

**a.** Determining what the reality is for Chameera's business at the moment, which means collecting information about it and measuring its performance.

**b.** Making sure the goals for Chameera's business have been thought out in appropriate detail. Are they relevant to his business and are they possible? When will they be achieved and how will their success be measured?

**c.** Based on all the information gathered, deciding what the way forward is for Chameera's business so that it can achieve its goals.

**d.** Making sure you both have a full understanding of the topic – the business context Chameera works in (tourist trekking tours) and the wider environment (the tourism and hospitality industry in upland Sri Lanka).

**e.** Deciding what factors are options for the development of Chameera's business and what factors are possible obstacles to it. These can help or hinder his business in achieving its goals.



**Activity M1-8d-1: Handout 1 - Self-reflection learning log**

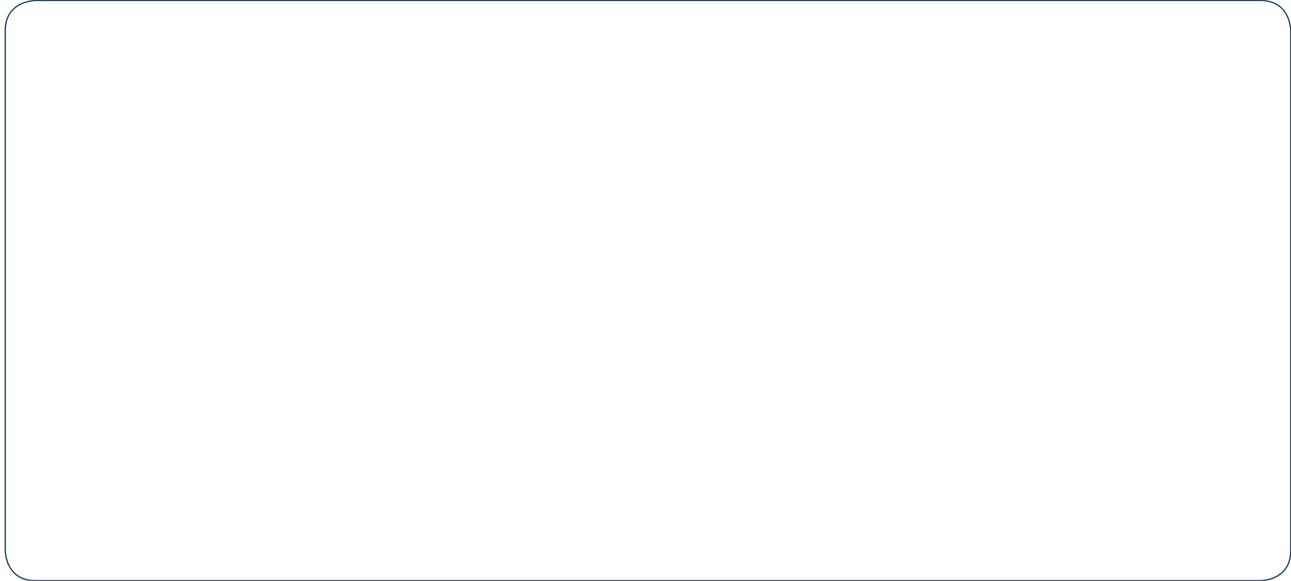
<b>Name:</b>		<b>Module number:</b>	
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*Please download and type your responses into the boxes (which will expand as you type). Then print off and include in your portfolio. Do not forget to include your name and the module number (above). You should write c. 125-200 words in each sections 1, 2 & 3. Section 4 is for you to use as you like, and record any things you want to remember/thoughts you have had.....*

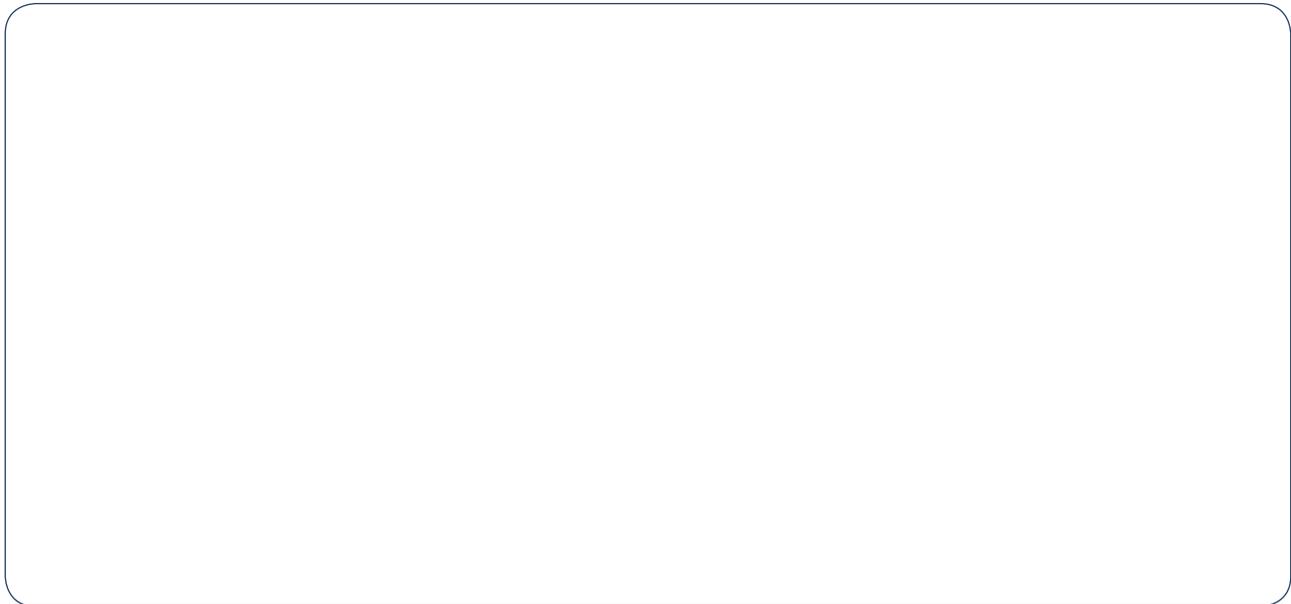
1. What were your main learning points from this module? (You may use bullet points, but do not just bullet point a list of learning points. Explain briefly what you have learnt about each one).

2. What was covered in the module that you need to find out more about? When and where will you improve your knowledge and skills concerning this? If you feel less sure about it, is it something that you can use in your coaching, or not yet?

3. What from the module are you most excited about, and looking forward to putting into practice?  
How will you set about this?



4. Anything else?



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# Module 2

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**Basics of Business Coaching**

All resources are A4 size unless stated / Dotted line means to cut.

Activity M2-1-1	Handout 1 with the titles of the ten steps of the coaching journey (Three sets of strips - ten strips per set).
Activity M2-1-2	Handout 2 with the descriptions of the ten steps of the coaching journey (Three sets of strips - ten strips per set ).
Activity M2-2d-1	Handout 1 – Case Study Maria (one copy per participant).
Activity M2-2d-2	Handout 2 – Case Study Malaka (one copy per participant).
Activity M2-2d-3	Handout 3 – Case Study Asela (one copy per participant).
Activity M2–4b-1	Five balls - preferably bouncing, large and lightweight.
Activity M2-6a-1	Handout 1 - Internationally Accepted Principles of Coaching – titles (Three sets of strips - eight strips per set).
Activity M2-6a-2	Handout 2 - Internationally Accepted Principles of Coaching – descriptions (Three sets of strips (eight strips per set).
Activity M2-6a-3	Handout 3 - Internationally Accepted Principles of Coaching (one copy per participant).

**Activity M2-1-1:** Handout 1 - Titles of the ten steps of the coaching journey



**Prepare and Plan**

**Negotiate, Agree and Sign a Coaching Contract**

**Look for Options**

**Set SMART goals**

**Follow Up and Review**

**Final evaluation**

**Set the Tone**

**Lay the Foundation**

**Assess the client's current business situation**

**Ascertain desired goals**



**Activity M2-1-2:** Handout 2 - Descriptions of the ten steps of the coaching journey

Plan for your coaching process and research your client and their business sector.

Plan for your coaching process and research your client and their business sector.

Explain your credentials, how the process of coaching works, the roles of coach and client.

Agree on the terms of operation, set boundaries, responsibilities, times of meetings, action points, number of goals etc.

You may need to use different business analytical tools to ascertain the situation.

**Activity M2-1-2:** Handout 2 - Descriptions of the ten steps of the coaching journey

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.

Evaluate the advantages and disadvantages of the number of options available

Work with clients to set SMART goals with clear action points. Set realistic actions with achievable time frames for them.

Meet the client to review action points. If they haven't been achieved, support the client to reach them or revise action points.

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'.

**Activity M2-2d-1: Handout 1 - Case Study Maria****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 she is nervous of foreigners because she cannot always understand what they are saying – though she can speak English quite well as she learned it from her children.

She is used to her husband, who has had a better education, always telling her what to do and making all the decisions. Although she is probably more intelligent than him she finds it easier, when there are any difficulties, to just do what he says – even if she disagrees.



**Activity M2-2d-2: Handout 2 - Case Study Malaka****Malaka**

Malaka is 21 and grew up in a coastal resort and became skilled at kitesurfing. He has 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! He just has the dream but has no idea how to get there. He can be quite wild at times – like many young people he likes to party and drink with people of his own age. He finds older people boring but if he is going to succeed in any business, he needs a guiding hand.



**Activity M2-2d-3: Handout 3 - Case Study Asela**

### 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 has just set up his own business, offering trekking and walking trips that allow customers to see nature - with special arrangements made for tourists with disabilities - but he has only had three customers so far. One of them complained that the trek was very badly organised and refused to pay. He is still very upset about that and is not sure he wants to continue. He is knowledgeable about wildlife and plants and, having been in different companies, reckons he has a 'good head' for business and although he knows where he wants his new business to be in 5 years, has no idea how to get there. He knows that marketing is really important and wants to find someone who is good and experienced in it. How can he let potential customers in other countries know about his business?



● **Activity M2-6a-1:** Handout 1 - Internationally Accepted Principles of Coaching – Titles



**Reputation**

**Continuous Improvement**

**Competence**

**Integrity**

**Awareness**

**Respect**

**Equality**

**Confidentiality**



**Activity M2-6a-2:** Handout 2 - Internationally Accepted Principles of Coaching – Descriptions



**Coaches will act positively and maintain the highest standards in a way that reflects well on the individual coach and the profession at large.**

**Coaches will commit to developing and improving their experience, knowledge, ability and professional skills.**

**Coaches will maintain high standards of expertise in their work.**

**Coaches will represent themselves in an honest and fair manner, including being knowledgeable about their particular competencies and personal limitations.**

**Coaches will understand how their own belief systems, values, needs, and limitations affect the way they work.**

**Coaches will honor their client and understand cultural differences, their own cultural background and biases, and the client's right to autonomy, privacy, and confidentiality.**

**Coaches will avoid discrimination by maintaining fairness and equal rights in all activities will not take part in unfair or discriminatory practices. This includes discrimination about age, race, gender, ethnicity, religion, sexual orientation, disability, language or socio-economic status.**

**Coaches will not pass on any information about their clients to anyone else unless the client explicitly allows it.**



● **Activity M2-6a-3:** Handout 3 - Internationally Accepted Principles of Coaching

<b>Principle</b>	<b>Description</b>
<b>Reputation</b>	Coaches will act positively and uphold the highest standards in a manner that reflects well on the individual coach and the profession at large.
<b>Continuous Improvement</b>	Coaches will commit to continuous learning and enhancing their experience, knowledge, capability and professional skills
<b>Competence</b>	Coaches will maintain high standards of competence in their work
<b>Integrity</b>	Coaches will represent themselves in an honest and fair manner, including being knowledgeable about their particular competencies and personal limitations.
<b>Awareness</b>	Coaches strive to be aware of their own belief systems, values, needs, and limitations and the effect of these on their work.
<b>Respect</b>	Coaches will treat clients with dignity and respect, being aware of cultural differences, their own cultural background and biases, and the client's right to autonomy, privacy, and confidentiality.
<b>Inclusivity</b>	Coaches will avoid discrimination by maintaining fairness and equality in all activities will not knowingly participate in unfair or discriminatory practices. This includes, but is not limited to, discrimination on the basis of age, race, gender, ethnicity, religion, sexual orientation, disability, language or socio-economic status.
<b>Confidentiality</b>	Coaches will maintain the strictest levels of confidentiality with all parties as agreed upon.



Trainer Resources

# Module 3

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## The Coaching Model

All resources are A4 size unless stated.

Activity M3-6b-1	Handout 1 – A table for a categorisation task (one A3 copy per group)
Activity M3-6b-2	Handout 2 – The Basic Information Form (one copy per participant)
Activity M3-7b-1	Handout 1 – Action and Skills Development Plan with blanked-out titles (one copy per participant)

**Activity M3-6b-1: Handout 1 – Categorisation Task**

In the four categories, arrange your ideas for the basic pieces of information to collect about a business.

<b>Category</b>	<b>Pieces of information needed</b>
<b>Details of client</b>	
<b>Basic information of business</b>	
<b>Business profile</b>	
<b>Staffing and skills data</b>	



**Activity M3-6b-2: Handout 2 - The Basic Information Form**

**A. Details of Client**

1. Full name of the client												
2. Designation	Owner		Manager		Other (please specify)							
3. Email												
4. Mobile Number												
5. Landline												
6. NIC No												

**B. Basic Information of Business**

7. Name of the business:				
8. Address:				
9. Legal status:	Registered		Not registered	
10. Details of registration	<b>Institution</b>	<b>√ or X</b>	<b>Location</b>	<b>Registration No.</b>
	Divisional Secretariat Office			
	Pradeshiya Sabha (Trade licence)			
	Sri Lanka Tourism Development Authority (SLTDA)			
	Registrar of companies			

**Activity M3-6b-2: Handout 2 - The Basic Information Form**
**C. Business Profile**

11. Type of business (brief description of business type and activity, and period of operation)

12. Size of business (multiple locations? Number of units such as rooms, jeeps? Turnover?)

13. Customer profile (local / overseas / mixture? Numbers per week / month / year?)

**D. Staffing and Skills Data**

14. How many people are currently employed? (enter numbers)

Family members				Full time staff				Part time staff			
Male		Female		Male		Female		Male		Female	

15. Is this the normal staffing level, or are there more / fewer staff at different times of year?

**Activity M3-6b-2: Handout 2 - The Basic Information Form**

16. Does the business employ any people with disabilities?

Yes		No	
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If yes, provide details below

17. Do employees come from a variety of communities? (Sinhalese, Tamil, Muslim, Burgher)

18. Have the employees participated in any skills development training in the last four years?

Yes		No	
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19. Has the client him / herself participated in any skill development training in the last four years?

Yes		No	
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**Activity M3-7b-1:**

**Handout 1- Action and Skills Development Plan**

Areas of Focus for Action	What to do - SMART 1. _____	2. _____	Resources/ 3. _____ Required	4. _____
Product				
Marketing				
Operations/ 5. _____				
Human Resource 6. _____				
Environmental 7. _____				
Business Activity				
Other 8. _____				



Trainer Resources

# Module 4

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## Managing Change

All resources are A4 size unless stated / Dotted line means to cut.

Activity M4-2b-1	Handout 1 - Helping People Through Resistance (one copy per participant)
Activity M4-2b-2	Handout 2- Six Change Approaches - Matching Exercise (one A3 copy per group, cut up)
Activity M4-2b-3	Handout 3 - Six Change Approaches - Participant Record (one copy per participant)
Activity M4-3-1	Handout 1 - Case Studies (one copy per participant, cut up)

● **Activity M4-2b-1: Handout 1 - Helping People Through Resistance**

Actions the change manager (usually the client) can take to help people with the four stages of resistance.

<p><b>Stage 1 - Deny</b></p> <p>We want to help people understand what is really true. So...</p> <ol style="list-style-type: none"> <li>1. Clearly communicate reasons for the change.</li> <li>2. Also communicate the negative implications of not changing.</li> <li>3. Ask for alternative suggestions, and take these seriously!</li> <li>4. Make sure they fully understand what is expected of them (and what is not).</li> <li>5. Ask what they know about the change, and fill any gaps.</li> <li>6. Talk to them about how they feel about the change.</li> </ol>	<p><b>Stage 4 - Commit</b></p> <p>We want to encourage everybody to contribute. So...</p> <ol style="list-style-type: none"> <li>1. Ask how they will know that the change has succeeded (and them with it!)</li> <li>2. Congratulate them!</li> <li>3. Explore how rewarding it feels to be part of this success, and encourage them to take pleasure in this.</li> <li>4. Encourage them to think of further opportunities for themselves and the business.</li> </ol>
<p><b>Stage 2 - Resist</b></p> <p>We want to help move beyond blame and negativity. So...</p> <ol style="list-style-type: none"> <li>1. Acknowledge the genuineness of feelings. Never be dismissive.</li> <li>2. Ask what steps they can take to help manage and own the change.</li> <li>3. Help them to take these steps. This may involve training or changed work patterns.</li> <li>4. Encourage doubters to talk to those who think it a good change.</li> </ol>	<p><b>Stage 3 - Explore</b></p> <p>We want to encourage people to try things out and look to the future. So...</p> <ol style="list-style-type: none"> <li>1. Ask how they can make a difference towards the change.</li> <li>2. Ask what they would like to create from this change. Can you accommodate that?</li> <li>3. Ask them how the future looks, for the business and for them personally.</li> <li>4. Ask them if they can see future opportunities from this change.</li> </ol>



### Activity M4-2b-2: Handout 2 - Six Change Approaches - Matching Exercise

Make a copy of this activity for each group of 4 or so participants. Cut along the dotted lines so each set has 12 pieces.



<p>Education &amp; Communication</p>	<p>Do this before you start the change, to help with understanding of why the change is proposed. It's better to over-communicate than under-communicate! Vary methods; one-to-one meetings, team meetings, etc. √ Greater understanding gets people involved × Can be very time-consuming, depending on numbers</p>
<p>Participation &amp; Involvement</p>	<p>Include people in the design of the change, the timing, the way it will be implemented. This will give people a greater sense of buy in or ownership. You can get commitment, rather than just compliance. √ Buy in of potential resisters, and possible problems foreseen. × Need to make sure no inappropriate change designed!</p>
<p>Facilitation &amp; Support</p>	<p>Carry people through the change to mitigate resistance. This can mean training/education and/or emotional support. It is suitable when people resist through fear/anxiety. √ Stop fear and anxiety spreading any further! × Can be time-consuming and expensive, and may not work!</p>
<p>Negotiation &amp; Agreement</p>	<p>Come to an arrangement with (potential) resisters. This may involve offering an incentive, financial or other. Get it in writing, though! Can be suitable for someone who stands to lose from change. √ Can be a quick and easy to head off resistance. × Can lead to resentment in others if seen as unfair.</p>
<p>Manipulation &amp; Co-optation</p>	<p>The first word means using information selectively, usually hiding some aspects for now. The second means giving a role in implementation to an individual, especially if he/she is a leader who can bring others along. Often an ethically grey area √ Quick and inexpensive. × If people feel you are playing them they may resist even more!</p>
<p>Explicit &amp; Implicit Coercion</p>	<p>Basically, you are threatening. A person may lose her/his job, be demoted, be moved to another function. You may make this clear or just suggest it. Can be suitable if speed of change is important. √ Quick. Concentrates minds. × Can backfire if people feel ill-used.</p>



### ActivityM4-2b-3: Handout 3 - Six Change Approaches - Participant Record

These are the 6 approaches suggested by Kotter & Schlesinger as ways to help handle resistance to change.

<p>1. Education &amp; Communication</p>	<p>Do this before you start the change, to help with understanding of why the change is proposed.          It's better to over-communicate than under-communicate!          Vary methods; one-to-one meetings, team meetings, etc.          ✓ Greater understanding gets people involved          × Can be very time-consuming, depending on numbers</p>
<p>2. Participation &amp; Involvement</p>	<p>Include people in the design of the change, the timing, the way it will be implemented. This will give people a greater sense of buy in or ownership.          You can get commitment, rather than just compliance.          ✓ Buy in of potential resisters, and possible problems foreseen.          × Need to make sure no inappropriate change designed!</p>
<p>3. Facilitation &amp; Support</p>	<p>Carry people through the change to mitigate resistance. This can mean training/education and/or emotional support.          It is suitable when people resist through fear/anxiety.          ✓ Stop fear and anxiety spreading any further!          × Can be time-consuming and expensive, and may not work!</p>
<p>4. Negotiation &amp; Agreement</p>	<p>Come to an arrangement with (potential) resisters. This may involve offering an incentive, financial or other. Get it in writing, though!          Can be suitable for someone who stands to lose from change.          ✓ Can be a quick and easy to head off resistance          × Can lead to resentment in others if seen as unfair.</p>
<p>5. Manipulation &amp; Co-optation</p>	<p>The first word means using information selectively, usually hiding some aspects for now. The second means giving a role in implementation to an individual, especially if he/she is a leader who can bring others along. Often an ethically grey area.          ✓ Quick and inexpensive.          × If people feel you are playing them they may resist even more!</p>
<p>6. Explicit &amp; Implicit Coercion</p>	<p>Basically, you are threatening. A person may lose her/his job, be demoted, be moved to another function. You may make this clear or just suggest it.          Can be suitable if speed of change is important.          ✓ Quick. Concentrates minds.          × Can backfire if people feel ill-used.</p>



**Activity M4-3-1: Handout 1 - Case Studies**

**Ahmed** is a fisherman. He has a boat and an outboard motor. The boat is not covered, and he has no lifejackets. He generally fishes at night. His younger brother and a neighbour work with him, sometimes just one going with him, sometimes both. His youngest brother wants to come, too, and the neighbour's cousin.

There is a reef with a lot of fish not far offshore, and he has seen local boys spear fishing, and twice he saw tourists snorkelling. In the old days people used dynamite for fishing here, but that is very rare now. Further out, about 2km from shore, there are often dolphins. About 2km down the coast there is a bird sanctuary (park fees are payable, but only if you land) which has a lot of visiting birds from December to April.

He has noticed that more tourists have started coming to his beach. It's not a terribly busy beach, as there are only about 20 boats. They are all used for fishing, and most of the fishermen throw bits of fish and plastic rubbish on the beach. It gets cleaned every monsoon, but by then can be pretty smelly! This is a pity as the water is very calm in front of the reef, and if the beach was cleaner perhaps someone could set up sun beds and a stall for cold drinks, or whatever...

Ahmed is married and has one child so far. His wife wants him to spend more time at home, but he wants to spend his time building up more of a future with his family. Ahmed's parents have some savings, from working in the Gulf, and there is a BoC branch 5km away. There are 4 or 5 reasonable sized guesthouses in the area, and a big hotel was built only 2km away, and opened last year.

Ahmed's neighbour has a three-wheeler, with a loan from a finance company, and spends the day time making money with this.

**Aarushi** manages a family 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!

The business is advertised on boards outside the supermarket and the bank in the village, and they have a facebook page, and a google business page. They have had some good reviews, which definitely brings more business. They also get recommended by some hotels in the area. They don't pay commission, but take sweets and cakes to the reception desks of these hotels sometimes.

The problem is a group (maximum 12 people) may be made of one family, or it may be made up of people from 2 or 3 different places. Aarushi used to be able to hold everything in her head, but now she may have 3 or more groups every day, and some people may book the same day, some the day before, and some up to a week early! By mistake she let 20 people join one group! And she only had 12 water bottles, because she always gets the water for that day's walks.

Another problem is transport. Groups usually start from the front of the house, but if it's a single family they may want to be collected. And some of the older tourists can't manage the whole walk by themselves, and need transport between sites. She has the numbers of 6 or 7 three wheelers, but sometimes can't reach any!

Poor Aarushi is getting stressed, and her brothers are blaming her.



Trainer Resources

# Module 5

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## Diversity and Inclusion

All resources are A4 size unless stated / Dotted line means to cut.

Activity M5-2a-1	Handout 1 - What is Marginalisation? (one copy per participants)
Activity M5-5b-1	Handout 1 - Info sheet for Participant A (for one quarter of the class)
Activity M5-5b-2	Handout 2 - Info sheet for Participant B (for one quarter of the class)
Activity M5-5b-3	Handout 3 - Info sheet for Participant C (for one quarter of the class)
Activity M5-5b-4	Handout 4 - Info sheet for Participant D (for one quarter of the class)
Activity M5-5b-5	Handout 5 - Info sheet on Barriers ( one per participant)
Activity M5-6b-1	Handout 1 - Case Study - Success Stories (for one - fifth of the class)
Activity M5-6b-2	Handout 2 - Case Study - Success Stories (for one - fifth of the class)
Activity M5-6b-3	Handout 3 - Case Study - Success Stories (for one - fifth of the class)
Activity M5-6b-4	Handout 4 - Case Study - Success Stories (for one - fifth of the class)
Activity M5-6b-5	Handout 5 - Case Study - Success Stories (for one - fifth of the class)
Activity M5-7a-1	Handout 1 - Helping People Through Resistance (one A3 copy per group)
Activity M5-7a-2	Handout 2 - Helping People Through Resistance (one A3 copy per group)
Activity M5-7b-1	Handout 1 - Case Study A (one A3 copy per group)
Activity M5-7b-2	Handout 2 - Case Study B (one A3 copy per group)
Activity M5-7b-3	Handout 3 - Case Study C (one A3 copy per group)
Activity M5-7c-1	Handout 1 - Evaluation of Marginalised Groups - Women (one A3 copy per group)

Activity M5-7c-2	Handout 2 - Evaluation of Marginalised Groups - People with Disabilities (one A3 copy per group)
Activity M5-7c-3	Handout 3 - Evaluation of Marginalised Groups - Youth (one A3 copy per group)
Activity M5-7c-4	Handout 4 - Evaluation of Marginalised Groups - Elders / Retirees (one A3 copy per group)
Activity M5-7c-5	Handout 5 - Answers - Women (Two A3 copies per class)
Activity M5-7c-6	Handout 6 - Answers - People with Disabilities (Two A3 copies per class)
Activity M5-7c-7	Handout 7 - Answers - Youth (Two A3 copies per class)
Activity M5-7c-8	Handout 8 - Answers - Elders / Retirees (Two A3 copies per class)



**Activity M5-2a-1: Handout 1: What is Marginalisation?****Definitions:**

Marginalisation is when an individual or group is put into a position of less power or isolation within society because of discrimination or a misguided perception. When an individual is marginalized, they are unable to access the same services and resources as other people and it becomes very difficult to have a voice and equal place in society.

USAID defines marginalized as:

“Those who are denied, or have very limited access to, privileges enjoyed by the wider society. They form a marginalized class because they are perceived as deviating from the norm, or lacking desirable traits, and therefore are excluded or ostracized as outsiders, because of ethnicity, religion, gender, sexual orientation, disability, or geography.”



**Activity M5-5b-1: Handout 1: Challenges and Barriers in your Community**

**Group A:**

Read and understand these personal and family based barriers. Discuss these with your groups. If you can think of any more then add them into the table. You will then explain these to the other groups later.

Source of barriers	Barriers for PWD	Barriers for Women
<p><b>Personal and family</b></p>	<p>Financial barriers, health issues, poor literacy.</p> <p>Lack of availability of assistive devices.</p> <p>Unsupportive culture, negative attitudes towards PWD working in income earning roles.</p> <p>Lack of access to personal computers and high cost of telephone services.</p>	<p>Language barriers, financial barriers, role conflicts at work and home. Lack of self-belief.</p> <p>Unsupportive family and neighbours, negative attitudes towards women working outside the home (especially in tourism), the belief it is 'safer' for them to work in the domestic sphere.</p> <p>Lack of access to personal computers and digital literacy skills.</p>



● **Activity M5-5b-2:** **Handout 2: Challenges and Barriers in your Community**

**Group B:**

Read and understand these barriers in relation to society and culture. Discuss with your groups. If you can think of any more then add them into the table. You will then explain these to the other groups later.

Source of barriers	Barriers for PWD	Barriers for Women
<p><b>Society and culture</b></p>	<p>Perception of PWD as helpless, or people who should be helped, leads to limited opportunities for them to develop self reliance and potential.</p> <p>Superstitious beliefs stigmatize PWD, and sometimes also their families.</p> <p>Charity towards PWD, practiced in the belief that the giver is more fortunate than the receiver, reinforces negative attitudes towards PWD.</p>	<p>Negative attitudes towards women working in income earning roles.</p> <p>Multiple role management. Women who work are still responsible for household management, husbands being not skillful (or willing) at household work.</p>



**Activity M5-5b-3: Handout 3: Challenges and Barriers in your Community****Group C:**

Read and understand these barriers in relation to environment and transport. Discuss with your groups. If you can think of any more then add them into the table. You will then explain these to the other groups later.

Source of barriers	Barriers for PWD	Barriers for Women
<b>Environmental and transport</b>	Lack of accessible public transport for people with mobility disabilities severely limits employment and educational opportunities.  Inaccessible buildings (steps, lack of lifts etc.).	Sexual harassment on public transport.



● **Activity M5-5b-4:** **Handout 4: Challenges and Barriers in your Community**

**Group D:**

Read and understand these barriers in relation to employment and working environment. Discuss with your groups. If you can think of any more then add them into the table. You will then explain these to the other groups later.

Source of barriers	Barriers for PWD	Barriers for Women
<p><b>Employment and working environment</b></p>	<p>Challenge for owners to see PWD as capable people.</p> <p>Poor attitudes and apathy shown towards them. Possibility of rejection by organisations, exploitation and unsupportive environments.</p> <p>Lack of inclusivity features, such as basic sign language being known to employers.</p>	<p>Challenge for owners to see women as capable people professionally.</p> <p>Sexual harassment in the workplace.</p> <p>Poor attitudes towards women.</p>



● **Activity M5-5b-5:** **Handout 5: Challenges and Barriers in your Community**

Source of barriers	Barriers for People with Disabilities (PWD)	Barriers for Women
Personal and family	<p>Communication barriers, financial barriers, health issues, poor literacy. Lack of availability of assistive devices.</p> <p>Unsupportive culture, negative attitudes towards PWD working in income earning roles.</p> <p>Lack of access to personal computers and high cost of telephone services</p>	<p>Language barriers, financial barriers, role conflicts at work and home. Lack of self-belief.</p> <p>Unsupportive family and neighbours, negative attitudes towards women working outside the home (especially in tourism), the belief it is 'safer' for them to work in the domestic sphere.</p> <p>Lack of access to personal computers and digital literacy skills.</p>
Society and culture	<p>Perception of PWD as helpless, or people who should be helped, leads to limited opportunities for them to develop self reliance and potential.</p> <p>Superstitious beliefs stigmatize PWD, and sometimes also their families eg. Karma.</p> <p>Charity towards PWD, practiced in the belief that the giver is more fortunate than the receiver.</p>	<p>Negative attitudes towards women working in income earning roles.</p> <p>Multiple role management. Women who work still responsible for household management, husbands being not skillful (or willing) at household work.</p>
Environmental and transport	<p>Lack of accessible public transport for people with mobility disabilities severely limits employment and educational opportunities.</p> <p>Inaccessible buildings (steps, lack of lifts etc.).</p>	<p>Sexual harassment on public transport.</p>
Employment and working environment	<p>Challenge for owners to see PWD as capable people.</p> <p>Poor attitudes and apathy shown towards them. Possibility of rejection by organisations, exploitation and unsupportive environments.</p> <p>Lack of inclusivity features, such as basic sign language being known to employers.</p>	<p>Challenge for owners to see women as capable people professionally.</p> <p>Sexual harassment in the workplace.</p> <p>Poor attitudes towards women.</p>



**Activity M5-6b-1: Handout 1: Case Study - Success Stories****Case Study A - Ruwanthika**

Ruwanthika hails from the District of Polonnaruwa in Sri Lanka. Although she has had a disability which affects her vision, she was able to overcome many personal and cultural obstacles to complete her standard level education.

Through the Skills for Inclusive Growth program Ruwanthika was able to undertake Professional Bakery Skills Training offered by VTA (Vocational Training Association) Polonnaruwa, through YMCA. The training brought about a huge change to her life, as she began both running her own home bakery business and subsequently working part time at a local bakery.

Her employer said “I only used to make breads and buns in my bakery prior to employing Ruwanthika. Neither myself or my workers are skilled enough to make anything else. I am impressed with the skills set that Ruwanthika possesses. When I see her I don’t see her disability, I see her as a multi skilled worker, who could potentially be my business partner. Her disability was not a barrier to me at all compared to her skills set. Because of her, we now produce items such as, pastries, pizzas, cakes and cupcakes adding value to what we offer at the bakery thus increasing our business income.”

She is a trailblazer by breaking down barriers that can often limit the successes of women like her in the region; she had the drive to achieve and through her skills has shaped a local business into newfound success. By doing so, Ruwanthika has demonstrated to so many others what could be possible for their futures.



**Activity M5-6b-2: Handout 2: Case Study - Success Stories****Case Study B - Ilhas**

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 have been 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.

On learning about the international cookery course being offered through an NGO, he was excited but also anxious that his disabilities would pose problems in a formal learning environment. He was pleasantly surprised, however, to find out that the course could be adapted to be taught through video, and by visually following the instructions he was able to successfully complete the course in three months.

No one is left out. With the training under his belt, Ilhas sought and found employment at the Blue Sea resort. The owner had misgivings about Ilhas's ability to interact with guests, but he realized that Ilhas was very eager to work, and decided to give him a chance. Ilhas was hired as an assistant cook and a housekeeper for Rs. 15,000 a month.

The owners gamble has paid off. Ilhas has proved his worth. He is diligent in completing the work assigned to him and also interacts with staff and guests well. Not only is Ilhas a conscientious employee, he is not shy to share his ideas for development with the owner. Wanting to make his workplace as welcoming as possible for Ilhas, Blue Sea's owner has started learning sign language. Ilhas has proved that despite a disability he could do his job as well as any other.

For his part, the owner has decided to hire more differently abled persons, now that he knows that a disability is not an impediment in getting a job done.



**Activity M5-6b-3: Handout 3: Case Study - Success Stories****Case Study C: Lalitha**

Lalitha was never interested in cooking as a young girl, though she was forced to cook when she got married. Life as a child had not been easy for Lalitha. Unable to cope with the financial burden of sustaining a family of six, her mother left for work in the Middle East.

Despite all that she managed to study up to 10th standard. The thirty year ethnic conflict took its toll on the family. They had been displaced many times. Lalitha had one leg amputated just above the knee during the war.

At the age of 24, she obtained employment in a local organization. While working there Lalitha met her life partner, Sri Kanthan, who had helped her in many ways and overlooked the fact that she was an amputee.

Despite lots of opposition, they got married and Lalitha stopped working in order to concentrate on family life.

When a social worker had informed her about the Supreme Chef competition auditions at the East Lagoon Hotel in Batticaloa, she felt encouraged, as the competition was open to the differently abled. The Supreme Chef competition was an initiative to not only improve standards in the tourism industry but also to introduce income generation projects to local communities irrespective of their situation in life or any specific disability. During the audition, Lalitha had explained her method of preparing cuttle- fish curry, and was jubilant to be chosen for further training in Colombo. The thought of having to leave her children and husband behind while she travelled to Colombo for training was daunting. Never one to discourage his wife, Srikanthan persuaded her to take the training, pointing out that he could look after the kids for the duration of her absence, once trained, Lalitha would be able to contribute to the family income through employment.

Lalitha's is a story of perseverance, of overcoming not only material challenges but physical situations too. She is indeed a great example to all those who are discouraged from looking at life positively when faced with problems. She was eliminated from the competition in the final rounds achieving 6th place, but she continued onward to complete the NVQ 4 level in commercial cookery course and upscaled her skills in order to become the chef she aspires to be and as a first step towards achieving this she has started working at a restaurant in Kalkudah to fulfill her goal.



**Activity M5-6b-4: Handout 4: Case Study - Success Stories****Case Study D - Sanjana**

Hailing from Hinkurangoda in the Polonnaruwa District, Sanjana learnt early in life to adjust to her circumstances. Sanjana displays spirit and determination that most of us might lack.

On completion of her ordinary level studies, Sanjana decided to look for employment, preferably as a baker of cakes. Colourful baked items had always fascinated her. So there was no turning back, when she heard about bakery training which was being run by an NGO. Nothing could dampen her excitement of becoming a proficient cake baker, not her disability or the 12 kilometers she had to travel to get to the training venue.

The training opened her up to the many methods of preparing baked goods such as cakes, buns, and pastries. On completion of her six months training, she was recruited by Jayantha Bake House in the city of Polonnaruwa.

With just a left-hand to work in the kitchen, it's not an easy job. There are times when she is challenged from carrying heavy trays to the oven or balancing the ingredients. But Sanjana has a great group of colleagues who help her get through the work. Sanjana is a determined dreamer; that someday she would be owning her own bakery. She sees herself providing quality cakes and baked goods to local residents and visitors. With her energetic drive, Sanjana has dispelled the myth that a disability is an excuse or barrier to gainful employment and has demonstrated that one can always reach one's full potential.



**Activity M5-6b-5: Handout 5: Case Study - Success Stories****Case Study E: Aruna**

Aruna's childhood had been one of hardship, she had given 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 was hardly enough to meet the basic needs of her family.

She was almost at the end of her tether, when she got to know about the NVQ – 4 course in Cookery supported by Miani Technical Institute – Batticaloa. She was skeptical about the training opportunities and employment in the Tourism Industry. For one, she was worried about going back to a classroom at her age, and the stigma that is usually associated with women

working in hotels. There was also the issue of having to leave her kids alone while in training or in employment downstream.

Luckily, she was able to find help with childcare, arranging for a place close to her training. The Director of the training institute also helped get her flexible training hours so she could balance her family life and schooling, and, with support from the training institute and her co- trainees, Jasmin successfully completed the NVQ level 4 course.

Having overcome her fears about being too old for schooling, Jasmin looks forward to taking more training so she could become a full-fledged chef. She now knows that age or background is no impediment to reaching for the stars, and also knows that hotels are safe workplaces for women.

"I find it inspiring that skills trainings such as these can be flexible to the situation and special needs of trainees such as myself. Today, I am earning a monthly income of Rs. 25,000 working as an assistant cook at the East Lagoon Hotel – Batticaloa and able to take care of my family. I am grateful for the chance to empower myself and I plan to encourage other women also who are in a similar situation as myself" - Jasmine.

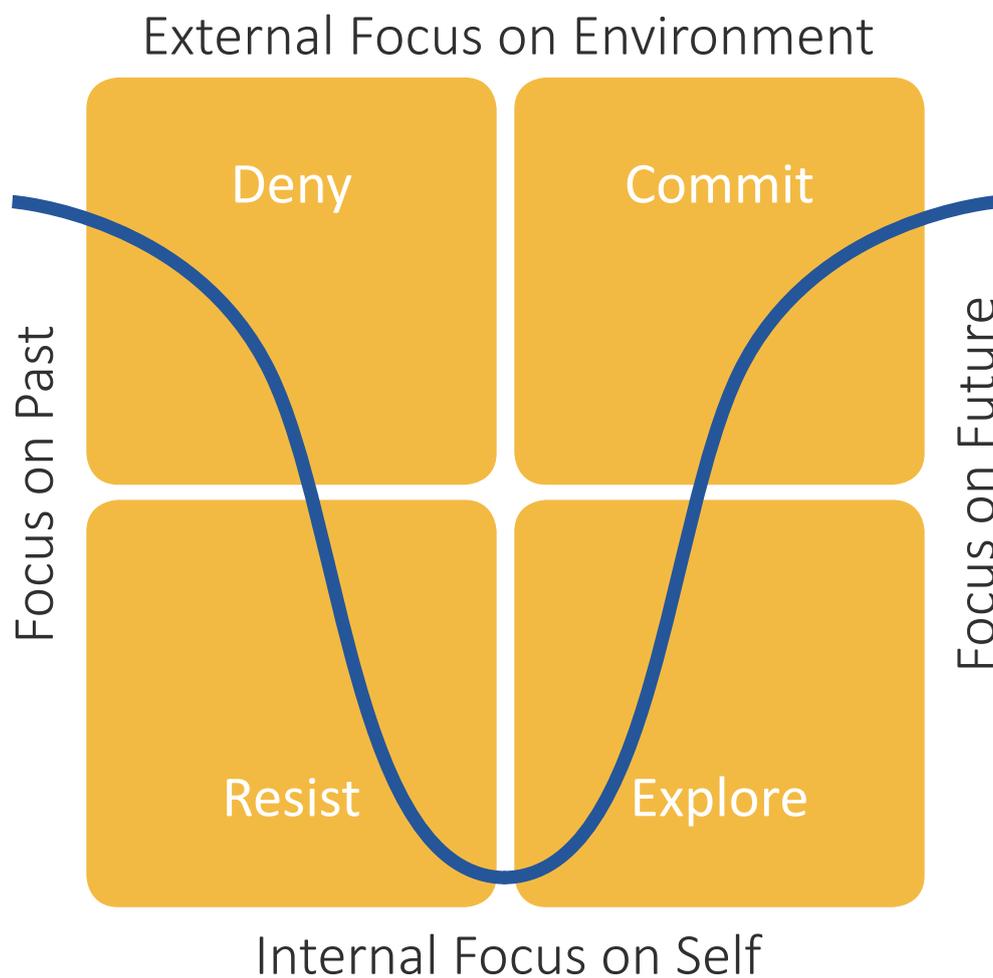


**Activity M5-7a-1: Handout 1: Helping People Through Resistance**

Remember the Scott and Jaffe Change model from the module on Change Management

How can you use this to help change your client's mindset to include marginalised groups in his or her business?

## Scott & Jaffe Change Model





## ● Activity M5-7a-2: Handout 2 - Helping People Through Resistance

Read these steps and apply them to guiding the client towards a more open mindset towards employment of diverse and marginalised groups.

<p><b>Stage 1 - Deny</b></p> <p>We want to help people understand what is really true. So...</p> <ol style="list-style-type: none"> <li>1. Clearly communicate reasons for the change.</li> <li>2. Also communicate the negative implications of not changing.</li> <li>3. Ask for alternative suggestions, and take these seriously!</li> <li>4. Make sure they fully understand what is expected of them (and what is not).</li> <li>5. Ask what they know about the change, and fill any gaps.</li> <li>6. Talk to them about how they <i>feel</i> about the change.</li> </ol>	<p><b>Stage 4 - Commit</b></p> <p>We want to encourage everybody to contribute. So...</p> <ol style="list-style-type: none"> <li>1. Ask how they will know that the change has succeeded (and them with it!)</li> <li>2. Congratulate them!</li> <li>3. Explore how rewarding it feels to be part of this success, and encourage them to take pleasure in this.</li> <li>4. Encourage them to think of further opportunities for themselves and the business.</li> </ol>
<p><b>Stage 2 - Resist</b></p> <p>We want to help move beyond blame and negativity. So...</p> <ol style="list-style-type: none"> <li>1. Acknowledge the genuineness of feelings. Never be dismissive.</li> <li>2. Ask what steps they can take to help manage and own the change.</li> <li>3. Help them to take these steps. This may involve training or changing work patterns.</li> <li>4. Encourage doubters to talk to those who think it is a good change.</li> </ol>	<p><b>Stage 3 - Explore</b></p> <p>We want to encourage people to try things out and look to the future. So...</p> <ol style="list-style-type: none"> <li>1. Ask how they can make a difference towards the change.</li> <li>2. Ask what they would like to create from this change. Can you accommodate that?</li> <li>3. Ask them how the future looks, for the business and for them personally.</li> <li>4. Ask them if they can see future opportunities from this change.</li> </ol>



**Activity M5-7b-1: Handout 1: Benefits of Diversity****Case Study A: Hotel Sunshine**

This hotel has made a commitment to the community that their employees represent the diversity in the community. They truly believe that having a diverse mix of people working together is better for business and society. All employees feel valued and respected for who they are and in turn they give 100% to the establishment. Having youth, both genders and differently abled people as part of the team encourages everyone to be creative and think of suitable solutions for all employees and guests.

The guests often comment on the mix of employees they interact with in a very positive manner. This is also a reason they recommend the hotel to their friends.



**Activity M5-7b-2: Handout 2: Benefits of Diversity****Case Study B: Clouds Hotel**

The management at this hotel thinks that it is best to only hire middle-aged men who share the same ethnicity for all types of work in their establishment. The men often bully and harass each other as they did in their school days, sometimes it becomes very aggressive. Levels of communication are very low and often management only finds out about issues when something has gone terribly wrong.

Female guests have reported feeling very uncomfortable and unsafe in this hotel due to unwanted attention from male staff. As a result, they have made negative comments on TripAdvisor and the hotel loses a lot of potential females and families as guests.



**Activity M5-7b-3: Handout 3: Benefits of Diversity****Case Study C: Happy Hotel**

The business model of the Happy Hotel is to hire marginalised groups and include them in the mainstream workforce. Twenty-five percent of its employees include people with physical and intellectual disabilities and also those from economically and socially disadvantaged groups. Happy Hotel is adamant that their model is not based on charity and it makes business sense for them.

In order to understand the needs of these different types of disabilities, the hotel liaises with NGOs in order to provide the right work support to these people. Happy hotel hires these groups of people on the same terms as they would an employee without disability. So, for example, they receive the same salary, the same benefits and the same hours of work.

Some changes of course had to be made in order to bring them into work. For example the people with disabilities do receive training before work but Happy Hotel also trains other employees who are not disadvantaged to learn sign language.

Overall, the management has observed great business benefits from this business model. For example, greater efficiency, perfection and diligence in work. The overall retention rate with these groups is double that of those without disabilities. Not only do they get more productivity, but it saves the hotel significant amounts of money in retraining.

When hiring people with disabilities, The Happy Hotel believes in looking beyond their disability and towards their ability.

According to a hotel survey conducted on hotels in Asia, this hotel was named the top 10 great places to work.



**Handout 1: Evaluation of Marginalised Groups**

**Activity M5-7c-1:**

Marginalised Group	Resistance from Employer	Advantages this group can offer to the workplace	Reasonable Adjustments to be made at the workplace by the employer
Women			



**Activity M5-7c-2:** Handout 2: Evaluation of Marginalised Groups

Marginalised Group	Resistance from Employer	Advantages this group can offer to the workplace	Reasonable Adjustments to be made at the workplace by the employer
People with Disabilities			



**Handout 3: Evaluation of Marginalised Groups**

**Activity M5-7c-3:**

Marginalised Group	Resistance from Employer	Advantages this group can offer to the workplace	Reasonable Adjustments to be made at the workplace by the employer
Youth			



**Activity M5-7c-4:** Handout 4: Evaluation of Marginalised Groups

Marginalised Group	Resistance from Employer	Advantages this group can offer to the workplace	Reasonable Adjustments to be made at the workplace by the employer
Elders / Retirees			



**Activity M5-7c-5: Handout 5 - Marginalised Group: Women - Answers****Resistance from Employer:**

- ✦ Challenge for owners to see women as capable people professionally. Poor attitudes towards women. Unfriendly corporate culture.
- ✦ A belief that women since they have home duties cannot be given enough attention to the workplace. So it's better if they stay at home.

**Advantages this group can offer to the workplace:**

- ✦ Females have a greater understanding of the needs of female guests and families in hotels and of female and family customers.
- ✦ Encourages the community and guests to view your establishment as 'safe for women'.
- ✦ Increase in creativity and the need for team building.
- ✦ Gender diversity increases collaboration and communication.
- ✦ Naturally good at multi-tasking and organisational skills
- ✦ Diversity would bring more innovation and creativity in groups
- ✦ An opportunity for Ethical marketing for the company

**Reasonable Adjustments to be made at the workplace by the employer****Sexual Harassment**

- ✦ Educate employees
- ✦ Make sure to include women in promotional and communications materials
- ✦ Where there is a known or immediate threat to women, it is recommended to assign two or more women, as single women in male dominated environments are more vulnerable to harassment.

**Safety**

- ✦ Late night work and travel should depend on the area and culture - some companies provide safe transport for female employees
- ✦ No names, phones numbers or addresses should be given out or placed in a space, where it can be obtained and used for intimidation or harassment.
- ✦ Women are at greater risk than men when in the presence of certain chemicals and hazardous materials. Prolonged exposure to certain toxic chemicals can harm a woman's reproductive capacities and can endanger the health of a fetus when a female employee is pregnant. Material safety data sheets should be available to all employees so that they know what potential hazards they are dealing with.



**Activity M5-7c-6: Handout 6 - Marginalised Group: People with Disabilities - Answers****Resistance from Employer:**

- ✦ Fixed mindset in thinking that PWDs cannot be as productive as people without disabilities
- ✦ A belief that it would require a bigger investment on the part of the employer and resistant to that
- ✦ Don't want to change
- ✦ Can't think outside the box to see the benefit

**Advantages this group can offer to the workplace:**

- ✦ They are highly motivated and engaged.
- ✦ They have high retention rates so you will have lower turnover costs.
- ✦ They are less likely to be involved in work related accidents as they are more aware of safety requirements.
- ✦ They are resilient and bring their own story and background to increase diversity in the establishment.
- ✦ An opportunity for employer to market themselves as an ethical employer and attract ethical buyers

**Reasonable Adjustments to be made at the workplace by the employer**

Not all people with disabilities (or even all people who have the same disability) will require the same thing. Reasonable changes may include:

- ✦ Modify the employee's work schedule in terms of hours, days, shifts, full or part-time work, or starting and ending times.
- ✦ Provide adequate breaks for those with a physical disability.
- ✦ Maintain a good relationship with PWD's family members in case of any issues.
- ✦ Provide a sign language interpreter or a reader when necessary at work for gatherings such as meetings and training sessions.
- ✦ Make sure that all areas the employee needs to enter to perform his or her job and to enjoy the equal benefits of employment are accessible.
- ✦ Provide or modify equipment or devices that are necessary to perform the essential function of the job.
- ✦ Adjust training materials or policies for an employee with a disability.
- ✦ Ensure adequate monitoring and assistance is available to them until they are familiar with the establishment and their role.



**Activity M5-7c-7: Handout 7 - Marginalised Group: Youth - Answers****Resistance from Employer:**

- ✦ A belief that young people lack discipline
- ✦ A belief that young people require a lot of training
- ✦ A belief that young people are not easy to retain

**Advantages this group can offer to the workplace:**

- ✦ Youth employees can attract younger guests.
- ✦ They have a learning mindset and do not have old habits that are difficult to break.
- ✦ They will be very comfortable to adopt the use of new technology.
- ✦ Less experienced staff will require lower wages that can increase as your establishment grows.

**Reasonable Adjustments to be made at the workplace by the employer**

- ✦ Young persons should work with an senior staff member and be allowed to be nurtured
- ✦ Young people can be given jobs that they will be good in for example technology



**Activity M5-7c-8: Handout 8 - Marginalised Group: Elders / Retirees - Answers****Resistance from Employer:**

- ✦ They can't do the same amount of work that a young person can.
- ✦ They are not active
- ✦ They have health concerns

**Advantages this group can offer to the workplace:**

- ✦ They are reliable and have a strong work ethic
- ✦ Maturity
- ✦ A wealth of experience
- ✦ Leadership skills
- ✦ Stronger communication skills and a greater willingness to 'speak up'
- ✦ Higher retention and engagement levels

**Reasonable Adjustments to be made at the workplace by the employer**

- ✦ Find out what their problems are and provide support so that they can do their job comfortably - for example an older person may have eye sight issues, so the company can provide for spectacles.



Trainer Resources

# Module 6

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## Communication Skills

All resources are A4 size unless stated / Dotted line means to cut.

Activity M6-1-1	Handout 1 - Barriers to Effective Communication (one copy per participant)
Activity M6-6c-1	Handout 1 - Active Listening Role Play ( $\frac{1}{3}$ of the total number of participants - e.g. if there are 20 participants in your class then you must make seven copies)
Activity M6-6c-2 (two pages)	Handout 2 - Active Listening Role Play ( $\frac{1}{3}$ of the total number of participants - e.g. if there are 20 participants in your class then you must make seven copies)
Activity M6-7a (six pages)	Cut-ups of 10 steps (two sets per class - A3 paper)
Activity M6-8c-1	Handout 1 - Back to Back Drawing - Participant A ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-8c-2	Handout 2 - Back to Back Drawing - Participant B ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-8c-3	Handout 3 - Back to Back Drawing - Observation Checklist for Participant C ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-8c-4	Handout 4 - Back to Back Drawing - Observation Checklist for Participant D ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-9a-1	Handout 1 - Role Card 1 - The Coach Damith (copies for $\frac{1}{3}$ of the total number of participants - e.g. if there are 20 participants in your class then you must make seven copies)
Activity M6-9a-2	Handout 2 - Role Card 2 - The Client Rukmani (Copies for $\frac{1}{3}$ of the total number of participants - e.g. if there are 20 participants in your class then you must make seven copies)
Activity M6-9a-3 (2 pages)	Handout 3 - Role Card 3 - Coach Jeewana (Copies for $\frac{1}{3}$ of the total number of participants- e.g. if there are 20 participants in your class then you must make seven copies)
Activity M6-10b-1 (8 pages)	Handout 1 - Cut - Ups (one A3 copy per group)

Activity M6-10b-2	Handout 2 - Question Types (one copy per participant)
Activity M6-11-1 (4 pages)	Handout 1 - Final Roleplay - Role Cards A ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-11-2 (4 pages)	Handout 2 - Final Roleplay - Role Cards B ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-11-3 (4 pages)	Handout 3 - Final Roleplay - Role Cards C ( $\frac{1}{4}$ of the total number of participants for example if there are 20 participants in your class then you need to make five copies)
Activity M6-11-4 (4 pages)	Handout 4 - Final Roleplay - Role Cards D ( $\frac{1}{4}$ of the total number of participants - e.g. if there are 20 participants in your class then you need to make five copies)
Activity M6-11-5 (2 pages)	Handout 5 - Sample Question Types (one copy per participant)



● **Activity M6-1-1:** Handout 1- Barriers to Effective Communication

Listener	Speaker
No questions were asked (it is important that the listener tests his / her understanding through questions) For example, the listener should clarify understanding by asking a question and can ask: "so, are you saying that ..."	The speaker should ask questions to confirm understanding ("Did you get that?" "Can you repeat what I just said?" "Now who are you supposed to meet?" "At what time?")
No active listening body language (the trainee should lean forward and physically listen, make eye contact, look interested)	The speaker doesn't watch the body language or facial expressions of the listener and react to it. The listener will definitely show confusion, nervousness, misunderstanding but the speaker will just keep on speaking.
Doesn't ask speaker to slow down / or to speak up	Speaking too quickly / too quietly
Doesn't write anything down	Doesn't write or draw any of the information
Doesn't ask for anything to be repeated / summarized	Doesn't repeat / summarise anything
Doesn't ask for the most important points to be repeated or confirmed.	Doesn't stress or emphasize any of the important points (higher volume, pausing before and after the points - very important)
Doesn't request a brief explanation about what's about to happen.  "Before we begin, what are we doing?"	Doesn't lead in with a brief explanation of what's going to happen.  "I'm about to pass on a rather detailed message about picking an important person up at the airport. Please listen carefully..."
Doesn't give vocal signals to show understanding or confusion:  "Ahhh." "Uhh huh!" "Unnn?!"	Doesn't listen for vocal signals.
Doesn't use appropriate hand gestures. (open palms indicating openness, counting fingers to show stages in the task)	Doesn't use appropriate hand gestures (point when saying to go somewhere, point at watch when saying the time, drive a car)



**Activity M6-6c-1: Handout 1 - Role Cards - Participant A and B****ROLE CARD A:**

You are going to listen to participant B's story. You must try to listen well. You must be attentive and listen well. Follow the guidelines below to be a good listener:

**Some tips for good listening:**

- ✦ Make direct eye contact
- ✦ Leaning towards the speaker
- ✦ Smile at times
- ✦ Show interest by nodding affirmatively
- ✦ Show interest through facial expressions
- ✦ Back-channel your understanding: Make non - verbal responses e.g. ummm.. Hmmm
- ✦ Back channelling verbally - eg. **okay, right, oh no, then, omg, really ! wow ! yeah !**
- ✦ Don't fidget e.g. playing with pen, hair, other items
- ✦ Being quiet while the speaker speaks
- ✦ Asking clarifying questions to understand what the speaker is saying - paraphrasing e.g. **"So does that mean that you were lost."**

**ROLE CARD B:**

You are going to listen to participant A's story. You must **act like a bad listener**. You must **not be attentive** and **not listen well**. Follow the guidelines below to be a bad listener:

**Some ideas for bad listening:**

- ✦ Use dead eyes with no expression
- ✦ Look somewhere else and have a wandering gaze - don't make good eye contact with the speaker
- ✦ Adopt a closed body attitude - e.g. folded hands or crossed legs.
- ✦ Angle your body away from the speaker
- ✦ Keep Fidgeting - e.g. playing with pencil, pen or hair, moving around in your chair, etc.
- ✦ Yawn as if you are tired
- ✦ Don't respond or back-channel to the speaker e.g. don't respond with **'okay, aha, hmm...'**.
- ✦ Interrupt the speaker by talking over them.



### ● Activity M6-6c-2: Handout 2 - Role Card C - OBSERVE Listener B

Your role is to be the observer. You will first observe Listener B when participant A is telling the story. Use the observation checklist below to analyse Participant B's listening performance. After the activity, give feedback to Participant B on what you observed.

#### Observer Checklist for Participant C

Did Listener B:

	Listener B	Comments
1. Make eye contact consistently?		
2. Display correct body signals that suggested interest e.g. 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 e.g. 'umm.. hmm, aaahaa'?		
7. Back-channel (verbal) to the speaker to signal comprehension e.g. ' <b>I see, omg, oh no, okay, so then, next, alright</b> ' 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?		

### Activity M6-6c-2: Handout 2 - Role Card C - OBSERVE Listener A

Your role is to be the observer. You will next observe Listener A when participant B is telling the story. Use the observation checklist below to analyse participant A's listening skills. After the activity, give feedback to Participant A on what you observed.

#### Observer Checklist for Participant C

Did Listener A:

	Listener A	Comments
1. Make eye contact consistently?		
2. Display correct body signals that suggested interest e.g. 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 e.g. 'umm.. hmm, aaahaa'?		
7. Back-channel (verbal) to the speaker to signal comprehension e.g. ' <b>I see, omg, oh no, okay, so then, next, alright</b> ' 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?		

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 1: Maintain Good Eye Contact

It's not fun when you are talking to someone and they are scanning the room, studying a computer screen, or gazing out the window. If the person were your child you might demand, "Look at me when I'm talking to you," but that's not the sort of thing we say to a friend, colleague or a business client.

In most western cultures, eye contact is considered a basic ingredient of effective communication. When we talk, we look each other in the eye.

Do your conversational partners the courtesy of turning to face them. Put aside papers, books, the phone and other distractions. Shyness, uncertainty, shame, guilt, or other emotions, along with cultural taboos, can inhibit eye contact in some people under some circumstances.

Look at them, even if they don't look at you. Excuse the other guy, but stay focused yourself.

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## STEP 2: Be Attentive, but Relaxed

Now that you've made eye contact, relax. You don't have to stare fixedly at your client. You can look away now and then and carry on like a normal person. **The important thing is to be attentive.** The dictionary says that to "attend" to another person means to:

- ✦ Be present
- ✦ Give attention
- ✦ Remain ready to serve
- ✦ Use humour appropriately
- ✦ Remain warm and approachable
- ✦ Mentally screen out distractions, like background activity and noise.
- ✦ Try not to focus on the speaker's accent or speech mannerisms to the point where they become distractions.
- ✦ Don't be distracted by your own thoughts or feelings.

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 3: Keep an Open Mind

- ✦ **Listen without judging the other person or mentally criticizing the things she or he tells you.** If what your client says alarms you, go ahead and feel alarmed, but don't say to yourself, "Well, that was a stupid!" As soon as you start making judgemental comments to yourself, you are not really listening.
  - ✦ **Listen without jumping to conclusions.** Remember that the speaker is using language to represent the thoughts and feelings inside their brain. You don't know what those thoughts and feelings are and the only way you'll find out is by listening.
  - ✦ **Learn to be comfortable with silence.** Silence is a powerful tool for coaches. People have a natural tendency to fill gaps in conversations, many feel uncomfortable with silence. As a coach, learn to be comfortable with silence. Hold back and let your client step forward to speak. Do not interrupt. Listen without making judgements and pay attention.
  - ✦ **Do not be critical** if the client doesn't understand what has been said. Try to be supportive and find a way to explain the concept in an easier way.
  - ✦ **Don't stop yourself from giving praise** and positive feedback when earned. However, be careful of giving praise all the time as it could sound diluted and fake.
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## STEP 4: Listen to the Words

**When it's your turn to listen, don't spend the time planning what to say next.** You can't rehearse and listen at the same time. **Think only about what the other person is saying.**

**Don't be a sentence-grabber.** If your client is a slow speaker, don't interrupt by finishing his or her sentences. If you want to continue like that then you might as well have this conversation by yourself, or do you want to hear what they have to say? **We all think and speak at different rates.** If you are a quick thinker and an agile talker, it is your responsibility to slow down your pace for the slower, more thoughtful communicator—or for the guy who has trouble expressing himself. Be patient.

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 5: Don't interrupt

**Children used to be taught that it's rude to interrupt.** But nowadays the opposite is being displayed on popular talk shows and reality programs, where loud, aggressive, in-your-face behaviour is accepted, if not encouraged.

**Interrupting sends a variety of messages.** It says:

"I'm more important than you are."

"What I have to say is more interesting, accurate or relevant."

"I don't really care what you think."

"I don't have time for your opinion."

"This isn't a conversation, it's a contest, and I'm going to win."

When you don't understand something, of course, you should ask the speaker to explain it to you. But rather than interrupt, wait until the speaker pauses. **This is called turn-taking.** Then say something like, "Sorry, but I didn't understand what you just said about..."

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## STEP 6: Use clear language appropriate to the listener

- ✦ Speak clearly and use a level of language appropriate for the listener and make clear statements without being overly complicated
- ✦ Communicate concepts in a variety of ways to help your client understand and adopt a pace that suits them.
- ✦ Do not confuse the client by giving too much information at once.

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 7: Don't hijack (switch) the conversation to another topic

At lunch, a colleague is excitedly telling you about her trip to Sigiriya and all the wonderful things she did and saw. During this conversation, she mentions that she spent some time with a mutual friend. **You jump in with, "Oh, I haven't heard from Amila in ages. How is she?" and, just like that, discussion shifts to Amila** and her divorce, and the poor kids and before you know it an hour is gone and Sigiriya is forgotten.

This kind of conversational 'hijacking' happens all the time. **Our questions lead people in directions that have nothing to do with where they thought they were going.** Sometimes we work our way back to the original topic, but very often we don't.

When you notice that your question has led the speaker off track, take responsibility for getting the conversation back on track by saying something like, **"It was great to hear about Amila, but tell me more about your adventure in Sigiriya."**

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## STEP 8: Don't impose your "solutions"

**When listening to someone talk about a problem, try not to suggest solutions.** Most of us don't want your advice anyway. If we do, we'll ask for it. Most of us prefer to figure out our own solutions. We need you to listen and help us do that. Somewhere way down the line, if you are absolutely bursting with a brilliant solution, at least get the speaker's permission. Ask, "Would you like to hear my ideas?"

**Know when you need to be quiet** and give the clients opportunities to speak and ask questions. Be patient and sincere, open and straightforward. Don't worry if you made a mistake, admit your mistakes. Be flexible and be prepared to change your position and the client will respect you for that.

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 9: Listen actively - give the speaker regular feedback

- ✦ Show that you understand where the speaker is coming from by **reflecting the speaker's feelings**. "You must be thrilled!" "What a terrible ordeal for you." "I can see that you are confused."
- ✦ If you are not sure what the speaker has just said then you can **paraphrase** the content of the message. This will help you to make sure you have understood the message as the speaker intended it. For example, you can ask "So in other words what you are saying is ..... Is that right?" or "So what I have understood you are saying is that ..... have I understood correctly?"
- ✦ This is also useful when the speaker has finished a big section of speech, it's a good idea to summarise the message in your own words to check if you have understood the message as intended.
- ✦ On the other hand, questions can also be used to check if your partner has understood what you said, for example you can ask "is that clear to you?" or "does that make sense?" or "do you understand?"
- ✦ Asking questions from your partner can definitely be a good thing as it shows your conversation partner that you are interested and are following the conversation.
- ✦ Use appropriate body signals to show that you are listening. For example, just nod and show your understanding through appropriate facial expressions and an **occasional well-timed "hmmm" or "uh huh."** This is also called **back-channelling**. The idea is to give the speaker some proof that you are listening, and that you are following her train of thought—not just lost in your own thoughts while she talks to the air.

**Activity M6-7a: 10 Steps to Effective Listening - Wall Reading**

## STEP 10: Pay attention to what isn't said—to nonverbal cues

**Face to face with a person, you can detect enthusiasm, boredom, or irritation very quickly in the expression around the eyes, the set of the mouth, the slope of the shoulders.**

These are clues you can't ignore. When listening, remember that words convey only a fraction of the message. So, if you are talking to someone and you see that they look uncomfortable or if they look unhappy or frustrated, then it might be a good idea to ask them if they are with you or if they are uncomfortable with this idea.

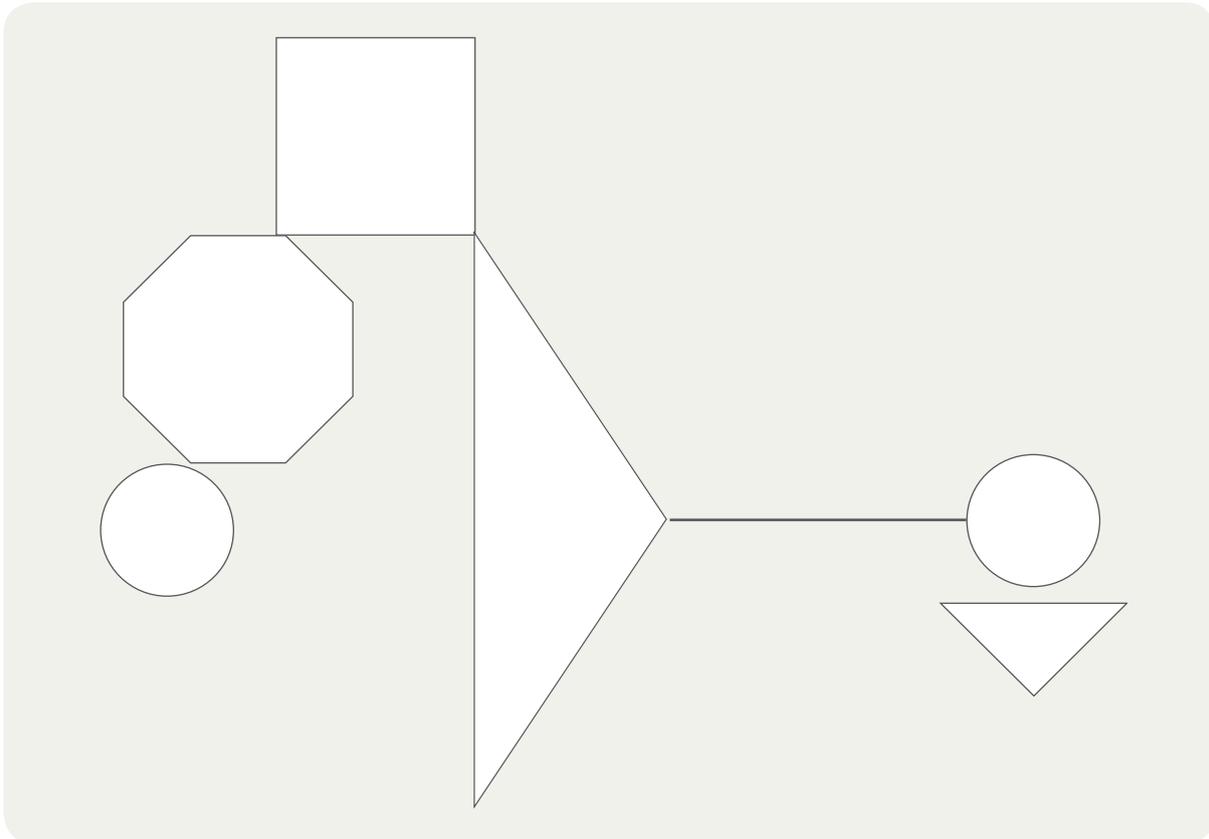
Paying attention to body language cues is very important as it gives you a clue that you can use to unravel problems before they blow up in your face.

At the same time, be aware of what your own body language may convey to your client. Therefore use body language appropriate for the situation: smile and use positive expressions

Tone of voice is another way you can communicate so you can say the same words but depending on how you say it, you could have the opposite reaction.

**Activity M6-8-1: Handout 1 - Back to Back Drawing - Participant A****Participant A - Part 1**

Sit with your back against your partner so that your partner cannot see you. Now describe this picture to your partner. Try to use the techniques we have learnt. Paraphrasing and Checking your partner's understanding will be particularly important.

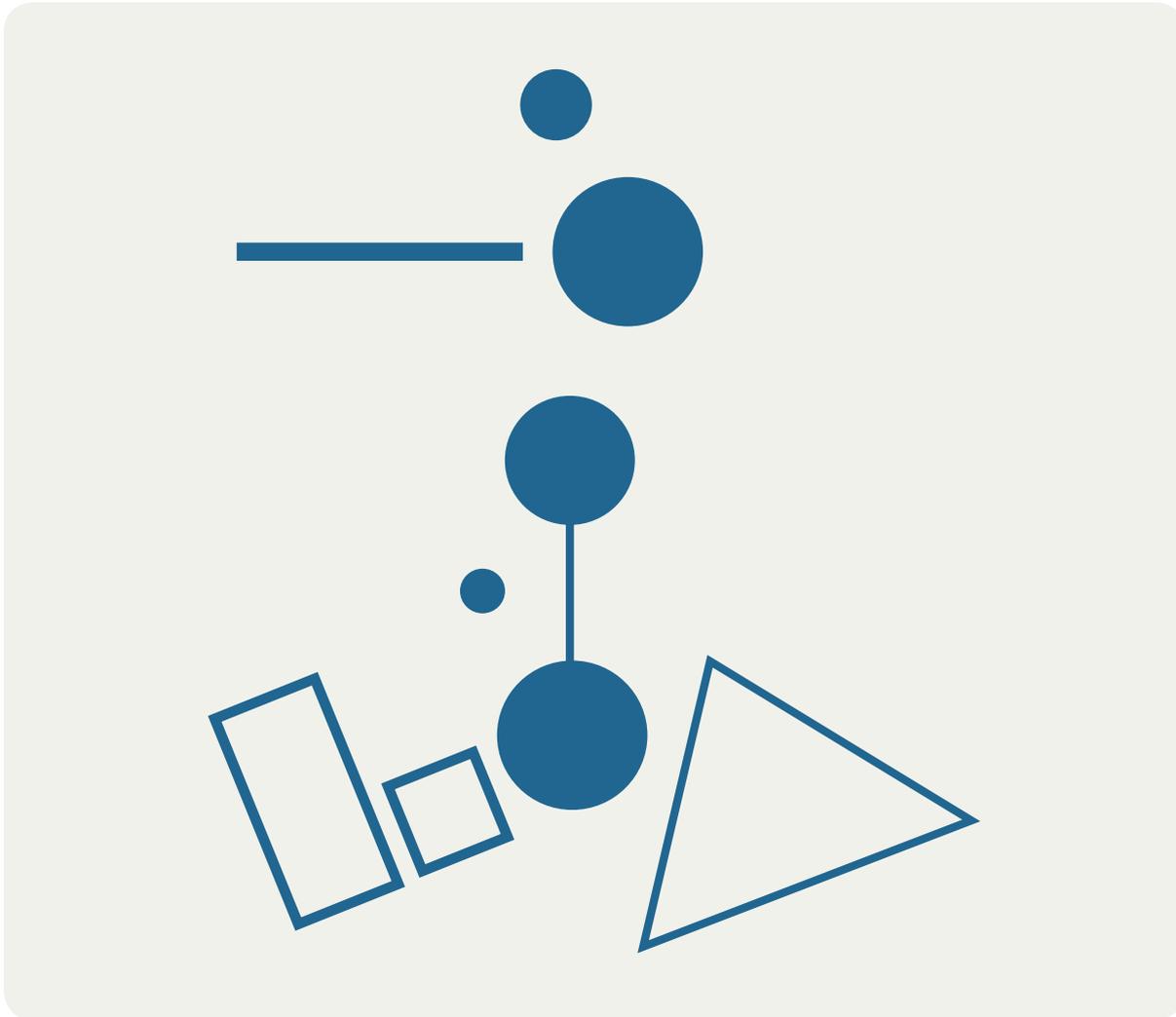
**Part 2**

Now it is your turn to draw. Your partner will explain a picture to you. You must listen and draw. You can use the back of this paper.



**Activity M6-8c-2: Handout 2 - Back to Back Drawing - Participant B****Participant B - Part 1**

Sit with your back against your partner so that your partner cannot see you. Now describe this picture to your partner. Try to use the techniques we have learnt. Paraphrasing and Checking your partner's understanding will be particularly important.

**Part 2**

Now it is your turn to draw. Your partner will explain a picture to you. You must listen and draw. You can use the back of this paper.



**Activity M6-8c-3: Handout 3 - Back to Back Drawing - Participant C**

Participant C - (Observe Participant A)

Observer's Checkbox

Use this checkbox tool to observe your assigned partner. Put a tick in the appropriate box each time you hear them using the following devices for communication:

Paraphrasing	Echoing	Reply questions
Checking for Clarification		
Summarising		

Participant C - Part 2

Observer's Checkbox

Use this checkbox tool to observe your assigned partner. Put a tick in the appropriate box each time you hear them using the following devices for communication:

Paraphrasing	Echoing	Reply questions
Checking for Clarification		
Summarising		



**Activity M6-8c-4: Handout 4 - Back to Back Drawing - Participant D**

Participant D- (Observe Participant B )

Observer's Checkbox

Use this checkbox tool to observe your assigned partner. Put a tick in the appropriate box each time you hear them using the following devices for communication:

Paraphrasing	Echoing	Reply questions
Checking for Clarification		
Summarising		

Participant D- Part 2

Observer's Checkbox

Use this checkbox tool to observe your assigned partner. Put a tick in the appropriate box each time you hear them using the following devices for communication:

Paraphrasing	Echoing	Reply questions
Checking for Clarification		
Summarising		



**Activity M6-9a-1: Handout 1 - Role Card 1 - The Coach Damith****Role Card for Coach Damith**

Your role is to be the coach. You are knowledgeable about the subject of business but you are not so familiar with communication strategies. In this roleplay, you can guide her to reach a solution but you are not able to use supportive body language.

Your body language cues, which you need to adopt are:

- Don't make eye contact with your client
- Fidget a little - play with your books, pen or look at different places
- Use a closed body posture for example sit with arms folded and with legs crossed.
- Lean away from the client and not towards them.
- Adopt an opposite style of speaking. For example, if the client speaks slowly, then you should speak fast. Don't mirror her style and do the opposite of what you see her doing.

Your Client:

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

Ask here some basic questions you may want to ask her about her business:

- ✦ How long has she been doing business?
- ✦ Is this a new phenomenon?
- ✦ Are there other stalls around?
- ✦ How many tourists come?

Ask her some more questions about what she knows about the tourists?

- ✦ Where do the tourists come from?
- ✦ Where are they going?
- ✦ Where are they staying?
- ✦ How does she know that?
- ✦ Does she talk to them?
- ✦ Are they friendly?
- ✦ Can she speak English?
- ✦ Does she know why they don't eat her food?
- ✦ Does she know what their requirements are?
- ✦ How does she think she can find this out?

Advice: If she doesn't think of a workable solution herself, then the coach can give some advice about what she could do or arrange for some exposure visit.



**Activity M6-9a-2: Handout 2 - Role Card 2 - The Client - Rukmani****Role Card for Client Rukmani**

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

You have decided to take some help and have discovered that there is a business coaching programme available in your area and you would like to go and talk to a coach. You hope they can help you. You have decided to try out two coaches and then will decide which one you would like to continue with.

Behaviour Cues:

- ✦ You are quite shy so you tend to look down and not make consistent eye contact
- ✦ You are shy to smile and don't look very confident

You are going to try out two coaches. After visiting them, decide which one you prefer?



**Activity M6-9a-3: Handout 3 - Role Card 3 - Coach Jeewana****Role Card for Coach Jeewana**

Your role is to be the coach. You are knowledgeable about the subject of business and you are very aware about communication strategies. You are an accomplished coach with a lot of experience. You are a strong believer in the use of body language to positively influence people.

Body language cues which you need to adopt are:

- ✦ Make gentle and consistent eye contact with your client
- ✦ Don't Fidget or play with your books, pen or even look at different places
- ✦ Give your client your full attention and put away whatever you were doing before
- ✦ Don't use a closed body posture for example sit with arms folded and with legs crossed.
- ✦ Lean towards the client and not away from them.
- ✦ Try to adopt a similar style of speaking. For example, if the client speaks slowly, then you should speak slowly too. Mirror your client's style.

You believe in the concept of mirroring:

- ✦ Watch the body language of the person you are talking to and copy it.
- ✦ This needs to be subtle and your client should not be able to notice that you are trying to copy their style.
- ✦ Copy their energy and their spoken language too. Use words that they use.
- ✦ Then, slowly open your body position up.
- ✦ They will usually follow and become more relaxed and more confident with you.



**Activity M6-9a-3: Handout 3 - Role Card 3 - Coach Jeewana****Role Card for Coach Jeewana**

Your Client:

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

Ask her some basic questions you may want to ask her about her business:

- ✦ How long has she been doing business?
- ✦ Is this a new phenomenon?
- ✦ Are there other stalls around you?
- ✦ How many tourists come?

Ask her some more questions about what she knows about the tourists?

- ✦ Where do the tourists come from?
- ✦ Where are they going?
- ✦ Where are they staying?
- ✦ How does she know that?
- ✦ Does she talk to them?
- ✦ Are they friendly?
- ✦ Can she speak English?
- ✦ Does she know why they don't eat her food?
- ✦ Does she know what their requirements are?
- ✦ How does she think she can find this out?

Advice: If she doesn't think of a workable solution herself, then the coach can give some advice about what she could do or arrange for some exposure visits.



**Activity M6-10b-1:** Handout 1 - Cut-Up - Question Types Matching Activity



**QUESTION TYPES**

**EXAMPLES**

**STRENGTHS**

**WEAKNESSES**

**Activity M6-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

# 1. Open Questions

- ✦ How was that strategy useful?’
- ✦ ‘What did you do to keep your team on track?’
- ✦ ‘How would you respond to this customer’s concerns?’
- ✦ How did you resolve the conflict in your team?

Open questions are commonly used:

- ✦ To encourage the client to speak so that you can gather the necessary information
- ✦ To find out more information
- ✦ To draw out opinions, feelings and detail
- ✦ To draw out a Creative answer
- ✦ In a critical discussion

They often start with why, what, where, which, and how.

You will find that they work best when the conversation is already flowing freely. So they may not work if you haven’t set the stage for it.

**Activity M6-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

## 2. Probing Question

- › Why do you think this is the case?’
  - › ‘What does that mean?’
  - › Tell me more about...?’
  - › ‘What are your options for solving the problem?’
  - › ‘Could you be more specific?’
  - › ‘Is there an option that you have not yet considered?’
  - › ‘How would an objective observer describe this situation?’
- 
- › These questions can be used to clarify something that has already been said or to find out more detail about it.
  - › They are useful in uncovering details that may have initially been overlooked or thought irrelevant
  - › Many of them are helpful in creating rapport.
- 
- › You must take care not to overuse them as this can make the client feel as if they are being interrogated or even attacked.
  - › Make sure your verbal and non-verbal signs are neutral or supportive when asking such questions.

**Activity M6-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

# 3. Closed Questions

- Do you have a swimming pool in your hotel?
- Are you on bookings.com?
- Do the tourists who live in your hotel give you feedback?
- Do you get more than 10 bookings in a month?

These questions can:

- Get right to the point and save time in a conversation.
- Be used to obtain agreement.
- Be used as guiding questions to help the client to formulate an answer when they are not able to expand on it independently.
- Be used to check if information has been understood or if a certain action has been carried out.
- Be effectively used early in conversations to encourage participation
- Be effectively used In some instances when an affirmative or negative answer is all that is needed.
- Be fact finding questions used to gain commitment and to confirm what has been said.

These questions:

- Are best avoided as they can harm the rapport and empathy that are an essential part of the process.
- Require the client to give a 'yes' or 'no' answer. Such questions should be used sparingly because they tend to make any conversation feel awkward and one-sided.

**Activity M6-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

# 4. Reflective Questions

- ◆ Client - 'I feel frustrated with my client.'
  - ◆ Coach - 'And what is this "frustrated with my client" experience like?'
  - ◆ What works and doesn't work in your classroom?
  - ◆ Where your biggest challenges are and how can you overcome them?
  - ◆ How can you improve professional development?
  - ◆ What you are most fearful of in your profession and how do you think you can face it?
- 
- ◆ This style of question reflects back to what the clients have just said using their exact words and allows them to fully explore their knowledge or feelings about a situation.
  - ◆ It's an internal pointing question and encourages us to think inwards.
  - ◆ It helps to raise self awareness which is needed for continuous improvement to happen.
  - ◆ It also provides an opportunity for the clients to give voice to the emotions they felt at that particular time without you having to interpret why this happened in your question.
  - ◆ Using this type of questions means that the coach can avoid having to judge or interpret why the client felt this way.
- 
- ◆ Some clients may feel uncomfortable talking about their feelings - they might need support through short answers / closed questions.

**Activity M6-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

# 5. Leading Questions

- ◊ 'So wouldn't it have been better to...?'
  - ◊ 'Don't you think we should have...?'
  - ◊ Did you enjoy working with the sales team? (prompts a positive response)
  - ◊ The project is going well, isn't it? (prompts a positive response)
  - ◊ Don't you think you should have...? (prompts a positive response)
- 
- ◊ They are useful in situations where you require a desired answer or to influence people's thinking. Sometimes they are required when the client is clueless and needs more help and guidance.
- 
- ◊ Leading questions need to be used with care when coaching because they imply that there is a right answer to the question and the coach is directing the client towards it, which is something that contradicts the ethos of coaching.

**Activity M5-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

## 6. Hypothetical Questions

- › 'What would you do if...?'
  - › 'What would happen if...?'
- 
- › These questions allow you to gauge how the client might act or what they think about a possible situation.
  - › They are effective in getting them to think about and discuss new ideas or approaches to a problem.
- 
- › Some clients may find it difficult to think outside the box and may not have any answer - they might need support through short answers / closed questions.

**Activity M5-10b-1: Handout 1 - Cut-Up - Question Types Matching Activity**

# 7. Paraphrasing Questions

- Client - 'I can't deliver that unless accounts get the information to me the same day.'
- Coach - So what you are saying is that you **could** deliver if the accounts department were able to get the information to you on the same day you requested it. Am I understanding this correctly?'
- These are one of the best means of checking your own understanding of what the client has said.
- Coaches may not know how to use this technique - how to paraphrase

**Activity M6-10b-2: Handout 2 - Question Types****1. Type of Question: Open Questions**

- ✦ How was that strategy useful?
- ✦ 'What did you do to keep your team on track?'
- ✦ 'How would you respond to this customer's concerns?'
- ✦ How did you resolve the conflict in your team?

**2. Probing Questions**

- ✦ Why do you think this is the case?'
- ✦ 'What does that mean?'
- ✦ Tell me more about...?'
- ✦ 'What are your options for solving the problem?'
- ✦ 'Could you be more specific?'

**3. Closed Questions**

- ✦ Do you have a swimming pool in your hotel?
- ✦ Are you on bookings.com?
- ✦ Do the tourists who live in your hotel give you feedback?
- ✦ Do you get more than 10 bookings in a month?

**4. Reflective Questions**

- ✦ Client - 'I feel frustrated with my client.'
- ✦ Coach - 'And what is this "frustrated with client" experience like?'
- ✦ What works and doesn't work in your classroom?'
- ✦ Where your biggest challenges are and how can you overcome them?'
- ✦ How can you improve professional development?'
- ✦ What you are most fearful of in your profession and how do you think you can face it?'

**5. Leading Questions**

- ✦ 'So wouldn't it have been better to...?'
- ✦ 'Don't you think we should have...?'
- ✦ Did you enjoy working with the sales team? (prompts a positive response)
- ✦ The project is going well, isn't it? (prompts a positive response)
- ✦ Don't you think you should have...? (prompts a positive response)

**6. Hypothetical Questions**

- ✦ 'What would you do if...?'
- ✦ 'What would happen if...?'

**7. Paraphrasing Questions**

- ✦ Client - 'I can't deliver that unless accounts get the information to me the same day.'
- ✦ Coach - So are you saying that you could deliver if the accounts department were able to get the information to you on the same day you requested it. Am I understanding this correctly?'



**Activity M6-11-1: Handout 1 - Role Cards for Participant A (Four Cards)****Roleplay 1 - Client - Rukmani****Role Card for Rukmani**

You are a 52 year old woman. You have a roadside stall on a main road selling tea, cold drinks, roti and buns. These days, you are getting more foreign customers. You have also noticed they never finish their tea. They sometimes look like they are going to buy food, then change their minds.

You are going to meet a business coach in order to get some ideas to improve your business.

But before you meet the coach, it might be a good idea to think about the things your coach might ask you:

- ✦ How long have you had this business?
- ✦ Do you hire anyone else?
- ✦ Where is it located?
- ✦ Is there any space around it?
- ✦ What does your stall look like?



**Activity M6-11-1: Handout 1 - Roleplay 2 - Coach A****Role Card for Coach A**

Asela is a 45 year old man who runs a business offering treks and tours in the forests and mountains of Srilanka. As you meet Asela, you want to try and make him feel comfortable, ask him some basic introductory questions before you ask about the problems he is facing in his business. Your goal is to find out what his problem is and then possibly guide him to think of some things that he would like to do or some actions he would like to take to improve his business.

Things to do before you start:

- ✦ Think of the kinds of questions you would like to ask Asela and prepare before you meet Asela.
- ✦ Keep in mind the communication strategies that we have studied in this module such as active listening, body language and asking effective questions.



### Activity M6-11-1: Handout 1 - Role Play 3 - Observer A

Your role is to observe and provide useful feedback to Participant C. Use this observation checkbox tool to observe and make some notes in your notebook if required:

#### Observer's Checklist

The coach...	Tick / Comments
1. Is able to define the objective of the meeting	
2. Is able to make the client comfortable by using appropriate body language and active listening skills	
3. Is able to describe the general process and the idea of coaching in simple terms	
4. Uses appropriate body language in order to seem approachable: eye contact, nodding, leaning forwards, smiling	
5. Asks open questions which encourage participant to give longer answers	
6. Listens to responses, remains flexible and can build on previous responses	
7. Uses back channelling verbally and non-verbally to show evidence of listening and appear encouraging	
8. Asks not just about short term goals but about long term business scope	
9. Explores the current reality by asking questions	
10. Doesn't interrupt and is able to take turns	
11. Is able to use questions effectively to elicit useful answers from the client and drive them towards finding the answers	
12. Doesn't jump to giving advice... rather elicits the solutions from the client	
13. Uses paraphrasing and summarising technique to clarify understanding	
14. Asks probing questions to get further information or to clarify the message received is as intended	
15. Brings in relevant and helpful examples from own life to add to the conversation	
16. Is able to guide the client to suggest their own actions and solutions	



**● Activity M6-11-1: Handout 1 - Role Play 4 - Observer A**

Your role is to observe Participant D on the type of questions that have been used in the roleplay. (Watch out for leading and closed questions. It's okay to include these questions but coaches should not use too many of these. Coaches should use more open and probing questions):

Observer Participant D as a coach and put a tick each time you hear a question of the types given below:

1. Open Questions	
2. Closed Questions	
3. Probing Questions	
4. Reflective Questions	
5. Leading Questions	
6. Paraphrasing Questions	
7. Hypothetical Questions	



**Activity M6-11-2: Handout 2 - Role Cards for Participant B (Four Cards)****Role Play 1 - Coach B****Role Card for Coach B**

You are going to play the role of a coach. You are going to work with Rukmani, who is a 52 year old woman who owns a roadside tea shop. As you meet Rukmani, you want to have a discussion with Rukmani and try to make her feel comfortable, ask her some basic introductory questions and give her some information about yourself as a coach before you ask about her problems she is facing in her business. You should try to ask more open and probing questions and lead her into suggesting where she would like to be in the future and what she thinks she needs to do to improve.

Things to do before you start:

- ✦ Think of the kinds of questions you might want to ask Rukmani and prepare before you meet Rukmani.
- ✦ Keep in mind the communication strategies which we have studied in this module such as active listening, body language and asking effective questions.



**Activity M6-11-2: Handout 2 - Role Play 2 - Client - Asela**

In this second role play, you are going to be the client Asela and this is your story:

**Role Card for Client Asela**

You own a small trekking and walking tour company that allows customers to experience nature. You offer treks and walks in the mountains and also bird watching tours. The advantage you hold is that you are very experienced and have good knowledge of plants and wildlife in Srilanka as you have been a guide for many years with different tour companies. However, now since you have opened your own company, you don't get time to run the tours yourself and therefore have to hire others to do the actual guiding.

"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. Often, I feel that this is due to a language barrier. 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?"

You have decided to meet a business coach in order to get some ideas to improve your business. Before you meet the coach think about:

- ✦ How long have you had this business?
- ✦ How many guides do you employ?
- ✦ What languages can they speak?
- ✦ How do you inform your clients about your business?



**Activity M6-11-2: Handout 2 - Role Play 3 - Observer B**

**Your role is to observe and provide useful feedback to Participant C** on the type of questions that have been used in the roleplay. (Watch out for leading and closed questions. It's okay to have them but coaches should not use too many of these. Coaches should use more open and probing questions):

Observe Participant C as a coach and put a tick each time you hear a question of the types given below:

1. Open Questions	
2. Closed Questions	
3. Probing Questions	
4. Reflective Questions	
5. Leading Questions	
6. Paraphrasing Questions	
7. Hypothetical Questions	



**Activity M6-11-2: Handout 2 - Role Play 4 - Observer B**

Your role is to observe and provide useful feedback to Participant D, the coach. Use this observation checkbox tool to observe and make some notes in your notebook if required:

**Observer's Checklist**

The coach...	Tick / Comments
1. Is able to define the objective of the meeting	
2. Is able to make the client comfortable by using appropriate body language and active listening skills	
3. Is able to describe the general process and the idea of coaching in simple terms	
4. Uses appropriate body language in order to seem approachable: eye contact, nodding, leaning forwards, smiling	
5. Asks open questions which encourage participant to give longer answers	
6. Listens to responses, remains flexible and can build on previous responses	
7. Uses back channelling verbally and non-verbally to show evidence of listening and appear encouraging	
8. Asks not just about short term goals but about long term business scope	
9. Explores the current reality by asking questions	
10. Doesn't interrupt and is able to take turns	
11. Is able to use questions effectively to elicit useful answers from the client and drive them towards finding the answers	
12. Doesn't jump to giving advice... rather elicits the solutions from the client	
13. Uses paraphrasing and summarising technique to clarify understanding	
14. Asks probing questions to get further information or to clarify the message received is as intended	
15. Brings in relevant and helpful examples from own life to add to the conversation	
16. Is able to guide the client to suggest their own actions and solutions	



### Activity M6-11-3: Handout 3 - Role Cards for Participant C (Four Cards)

#### Role-Play 1 - Observer C

Your role is to observe and provide useful feedback to Participant B. Use this observation checkbox tool to observe and make some notes in your notebook:

#### Observer's Checklist

The coach...	Tick / Comments
1. Is able to define the objective of the meeting	
2. Is able to make the client comfortable by using appropriate body language and active listening skills	
3. Is able to describe the general process and the idea of coaching in simple terms	
4. Uses appropriate body language in order to seem approachable: eye contact, nodding, leaning forwards, smiling	
5. Asks open questions which encourage participant to give longer answers	
6. Listens to responses, remains flexible and can build on previous responses	
7. Uses back channelling verbally and non-verbally to show evidence of listening and appear encouraging	
8. Asks not just about short term goals but about long term business scope	
9. Explores the current reality by asking questions	
10. Doesn't interrupt and is able to take turns	
11. Is able to use questions effectively to elicit useful answers from the client and drive them towards finding the answers	
12. Doesn't jump to giving advice... rather elicits the solutions from the client	
13. Uses paraphrasing and summarising technique to clarify understanding	
14. Asks probing questions to get further information or to clarify the message received is as intended	
15. Brings in relevant and helpful examples from own life to add to the conversation	
16. Is able to guide or drive the client forward into finding their own answers	



**Activity M6-11-3: Handout 3 - Role Play 2 - Observer C**

Your role is to observe and provide useful feedback to **Participant A** on the type of questions that have been used in the roleplay. (Watch out for leading and closed questions. It's okay to have them but coaches should not use too many of these. Coaches should use more open and probing questions):

Observe Participant A as a coach and put a tick each time you hear a question of the types given below:

1. Open Questions	
2. Closed Questions	
3. Probing Questions	
4. Reflective Questions	
5. Leading Questions	
6. Paraphrasing Questions	
7. Hypothetical Questions	



**Activity M6-11-3: Handout 3 - Role play 3 - Coach C****Role Card for Coach C**

You are going to play the role of a coach. You are going to work with Maria, who is a 55 year old woman who owns a small local cooking school. As you meet Maria, you want to have a discussion with Maria and try to make her feel comfortable, ask her some basic introductory questions and give her some information about yourself as a coach before you ask about her problems she is facing in her business. You should try to ask more open and probing questions and lead her into suggesting where she would like to be in the future and what she thinks she needs to do to improve.

Things to do before you start:

- ◆ Think of the kinds of questions and prepare before you meet Maria.
- ◆ Keep in mind the communication strategies that we have studied in this module such as active listening, body language and asking effective questions.



**Activity M6-11-3: Handout 3 - Role Play 4 - Participant C - Client: Ajith****Role Card for Client Ajith**

Ajith owns a small coconut farm. He wants to make extra income on the side and has thought of giving coconut plantation tours for the tourists. He has been advertising through some hotels and some tourist groups come. However, he is not happy as a number of tourists said that the tour was boring. He doesn't know why they would say something like that. He feels that his business is not growing. He thinks he could do much better but he doesn't know how to market it and how to make it attractive for the customers.

You have decided to meet a business coach in order to get some ideas to improve your business. Before you meet the coach think about:

- ✦ How long have you had this business?
- ✦ How many guides do you employ?
- ✦ What languages can they speak?
- ✦ How do you inform your clients about your business?
- ✦ What do you do when the tourists come?



**Activity M6-11-4: Handout 4 - Role Cards for Participant D****Role-play 1 - Observer D**

Your role is to observe and provide useful feedback to **Participant B** on the type of questions that have been used in the roleplay. (Watch out for leading and closed questions. It's okay to have them but coaches should not use too many of these. Coaches should use more open and probing questions):

Observe Participant B as a coach and put a tick each time you hear a question of the types given below:

1. Open Questions	
2. Closed Questions	
3. Probing Questions	
4. Reflective Questions	
5. Leading Questions	
6. Paraphrasing Questions	
7. Hypothetical Questions	



**Activity M6-11-4: Handout 4 - Role-play 2 - Observer D**

Your role is to observe and provide useful feedback to **Participant A**.  
Use this observation checkbox tool to observe and make some notes in your notebook:

**Observer's Checklist**

The coach...	Tick / Comments
1. Is able to define the objective of the meeting	
2. Is able to make the client comfortable by using appropriate body language and active listening skills	
3. Is able to describe the general process and the idea of coaching in simple terms	
4. Uses appropriate body language in order to seem approachable: eye contact, nodding, leaning forwards, smiling	
5. Asks open questions which encourage participant to give longer answers	
6. Listens to responses, remains flexible and can build on previous responses	
7. Uses back channelling verbally and non-verbally to show evidence of listening and appear encouraging	
8. Asks not just about short term goals but about long term business scope	
9. Explores the current reality by asking questions	
10. Doesn't interrupt and is able to take turns	
11. Is able to use questions effectively to elicit useful answers from the client and drive them towards finding the answers	
12. Doesn't jump to giving advice... rather elicits the solutions from the client	
13. Uses paraphrasing and summarising technique to clarify understanding	
14. Asks probing questions to get further information or to clarify the message received is as intended	
15. Brings in relevant and helpful examples from own life to add to the conversation	
16. Is able to guide the client into finding their own answers	



**Activity M6-11-4: Handout 4 - Role Play 3 - Participant D: Client - Maria****Role Card for Client Maria**

You are a housewife. You love cooking and in your district are seen as an 'expert' in Sri Lankan cuisine. Now that your children have grown up and are at college or in work, you have started a business where you offer cooking lessons in local food to foreign tourists. However, you have little experience of business and no experience of dealing with foreigners.

"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!

You are going to meet a business coach in order to get some ideas to improve your business.

Before you meet the coach, think about some questions your coach might ask you:

- ✦ How long have you had this business?
- ✦ Do you hire anyone else?
- ✦ Where is it located?
- ✦ Is there any space around it?
- ✦ What does your stall look like?
- ✦ What is your menu?



**Activity M6-11-4: Handout 4 - Role Play 4: Coach D****Role Card for Coach D**

You are going to play the role of a coach. You are going to work with Ajith, who is a 40 year old coconut farmer. Ajith has started another business stream on the side to generate new income and has started coconut farm tours for tourists. As you meet Ajith, you want to have a discussion with Ajith and try to make him feel comfortable, ask him some basic introductory questions and give him some information about yourself as a coach before you ask about his problems he is facing in his business. You should try to ask more open and probing questions and lead the client into suggesting where he would like to be in the future and what he thinks he needs to do to improve.

Things to do before you start:

- ◆ Think of some questions you would like to ask and prepare before you meet Ajith
- ◆ Keep in mind the communication strategies that we have studied in this module such as active listening, body language and asking effective questions.



**Activity M6-11-5**
**Handout 5 - Samples of Question Types - Coaching Related**

Open Questions
What obstacles are getting in the way of success?
How important is changing this problem to you in your life?
Is there anything or anyone you think might get in the way of success?
What is important to you about this?
What is the value or benefit for you?
What current options for action are available to you?
What obstacles do you expect to meet? How will you overcome them?
Do you know anybody else who seems to be successful in achieving this sort of goal? If so, what can you learn from them?
How will you know if you reach your goal?
Hypothetical Questions
What if this problem would disappear from one day to another?
How would you realize that this problem disappeared?
If you didn't have this problem, how would your life be different?
Let's imagine you have found a magic lamp, you stroke it and then it starts to talk. It tells you 3 actions you need to take to help you. What actions would they be?
What would your best friend advise you to do?
Probing Questions
What Have You Done To Try To Solve The Problem?
When did you feel you caused this problem, the last time you experienced this problem?
What do you think is at the root of the problem?
What have you learnt from that?
Why haven't you reached this goal already?
What is really stopping you?



● **Activity M6-11-5:** Handout 5 - Samples of Question Types - Coaching Related

Reflective Questions
What are your three strengths that come to you right away?
What do you do better than others?
Think about the last time you had this problem, what things did you do that added to this problem.
What constraints inside yourself are holding you back from this goal?
What constraints outside yourself are holding you back from this goal?
Closed Questions
Do you want to break down the overall goal into more manageable sub-goals?
Did you experience this problem recently in your life?
Have you tried to overcome this problem?
Did your strategy work?
Is this what you said?
Did I summarize what you said correctly?
Who else will be affected if you reach this goal?
How would you score your own level of commitment to achieving this goal, on a scale of 0 to 10? (0 being "absolutely not!" and 10 being "totally committed!")
Would it not be better to drop the idea and find something which you really want?
Do you need to feel guilty if you drop it?



Trainer Resources

# Module 7

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**Building Successful Relationships**

All resources are A4 size unless stated. Dotted line means to cut.

Activity M7-3c-1	Handout 1 - Cut-ups with 15 strips of sentences A to O (one A3 set per group)
Activity M7-3c-2	Handout 2 - First-Day Steps - Answers for Activity 3b (one copy per participant)
Activity M7-4a-1	Handout 1 - Partner Quiz Participant A (for half of the class)
Activity M7- 4a-2	Handout 2 - Partner Quiz Participant B (for half of the class)
Activity M7- 6a-1	Handout 1 - Coaching Agreement Sample A (one A3 copy per group)
Activity M7- 6a-2	Handout 2 - Coaching Agreement Sample B (one A3 copy per group)
Activity M7- 6a-3	Handout 3 - Coaching Agreement Sample C (one A3 copy per group)
Activity M7- 6a-4	Handout 4 - Coaching Agreement Sample D (one A3 copy per group)

**Activity M7-3c-1:****Handout 1 - Cut-Up - First-day Steps**

L. Welcome your client and ask them to sit down, shake hands.

O. Appear warm, personable, approachable. Think of body language, eye contact.

D. Introduce yourself

N. Find out about the client: name, family and general background and some other general questions to make them feel at ease.

E. Find out about their business - the basics - how long they've had it

F. Ask how they found out about the coaching session

G. Tell them about your work background and why you are doing this and what experience you have had with coaching (establish credibility)

H. Ask them what they want to achieve from the coaching



**Activity M7-3c-1:****Handout 1 - Cut-Up - First-day Steps**

I. Ask them how long they think the process will take. Give them some idea about this.

J. Ask them what they expect you to do for them.

K. Explain the role of a coach and their role as a client.

B. Talk about the importance of honesty and confidentiality.

A. Explain the process of coaching.

M. If they are happy with the idea, draw an agreement or a contract.

C. Sign the contract.



**Activity M7-3c-2:****Handout 2 - First-Day Steps**

1. Welcome your client and ask them to sit down, shake hands.
2. Appear warm, personable, approachable. Think of body language, eye contact.
3. Introduce yourself
4. Find out about the client: name, family and general background and some other general questions to make them feel at ease.
5. Find out about their business - the basics - how long they've had it
6. Ask how they found out about the coaching session
7. Tell them about your work background and why you are doing this and what experience you have had with coaching (establish credibility)
8. Ask them what they want to achieve from the coaching
9. Ask them how long do they think the process will take? Give them some idea about this?
10. Ask them what they expect you to do for them?
11. Explain what is the role of a coach and their role as a coachee
12. Talk about the importance of honesty and confidentiality
13. Explain the process of coaching 13.
14. If they are happy with the idea, draw an agreement or a contract.
15. Sign the contract



**Activity M7-4a-1**
**Handout 1 - Partner Quiz - Participant A**

**Participant A:** Test your partner B. Use the glossary below if you are not sure about the meaning of the words. Keep a track of your partner's answers. Your partner will do the same for you. Let's see who gets more points!

For example, ask your partner: *"Who needs to be ready to work collaboratively? Coach (C) or Client (CL)?"*

1. Ready to work collaboratively	CL / C
2. Able and willing to take responsibility for their own learning	C
3. Supportive, patient, empathetic, trusting and respectful	C
4. Focused and goal-oriented	C
5. Willing to commit time, energy and resources to the coaching process, over a significant period of time	CL
6. Is able to help define smart goals	C
7. Open and honest - willing to talk genuinely about their strengths, business situation and challenges	CL
8. Prepared to ask questions	CL / C
9. Is able to ask the right illuminating questions	C
10. Motivated to improve their business performance (or other desired outcome)	CL
11. Is able to conduct a business assessment	C

**GLOSSARY**

<p><b>1. Collaboratively</b> - to work together</p> <p><b>2. Empathetic</b> - to understand another person's situation and respond with care</p>	<p><b>3. Smart goals</b> - goals which can be measured</p> <p><b>4. Genuinely</b> - honestly</p> <p><b>5. Illuminating</b> - questions which reveal things or bring out the right answers</p>
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### Activity M7-4a-2: Handout 2 - Partner Quiz - Participant B

**Participant B:** Test your partner A. Ask your partner if these roles or responsibilities are for a good client or a coach? Use the glossary below if you are not sure about the meaning of the words before starting the quiz. Keep a track of your partner's answers. Your partner will do the same for you. Let's see who gets more points!

For example, ask your partner: *Who needs to deliver constructive feedback? Coach (C) or Client (CL)?*

1. Delivers constructive feedback	C
2. Positive, enthusiastic and observant	C
3. Willing to face weaknesses and be open to self-assessment practices	CL
4. Facilitates others' mindset to enable fresh perspectives	C
5. Keeps the focus on clearly defined actions and is able to negotiate and agree on actions	C
6. Explains clearly the coaching process	C
7. Ready to take responsibility for their own learning	CL
8. Facilitates access to other business development services, such as training	C
9. Can facilitate a joint agreement on a coaching contract	C
10. Is knowledgeable and a clear communicator	C
11. Has the ability to make people feel at ease in order to open up	C

#### GLOSSARY

<p><b>1. Constructive Feedback</b> - Feedback given to help another person improve often given with some suggestions for improvement</p>	<p><b>2. To facilitate</b> - is to help and support another person without forcing them to do something</p>
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**Activity M7-6a-1****Handout 1: Analysis of Coaching Agreements- Sample A**

This Agreement is entered into by and between: Name, Company, Address \_\_\_\_\_ (Coach— identify coaching qualifications, certificate, credential, etc.) and \_\_\_\_\_ Name, Address (Client)

Description of Coaching: Coaching is a partnership (defined as an alliance, not a legal business partnership) between the Coach and the Client in a thought-provoking and creative process that inspires the client to maximize personal and professional potential. It is designed to facilitate the creation / development of personal, professional or business goals and to develop and carry out a strategy / plan for achieving those goals.

**1) Coach-Client Relationship**

- A.** Coach agrees to maintain the ethics and standards of coaching behavior. It is recommended that Client reviews the Coaching Code of Ethics and the standards of behaviour expected from either party in a coaching relationship.
- B.** Client is solely responsible for creating and implementing his / her own physical, mental and emotional well-being, decisions, choices, actions and results arising out of the coaching relationship and interactions with the Coach. As such, the Client agrees that the Coach is not and will not be liable or responsible for any actions or inaction, or for any direct or indirect result of any services provided by the Coach. Client understands that coaching is not therapy and does not substitute for therapy if needed, and does not prevent, cure, or treat any mental disorder or medical disease.
- C.** Client further acknowledges that he / she may terminate or discontinue the coaching relationship at any time.
- D.** Client acknowledges that coaching is a comprehensive process that may involve different areas of his or her life, including work, finances, health, relationships, education and recreation. The Client agrees that deciding how to handle these issues, incorporate coaching principles into those areas and implementing choices is exclusively the Client's responsibility.
- E.** Client acknowledges that coaching does not involve the diagnosis or treatment of mental disorders and that coaching is not to be used as a substitute for counseling, psychotherapy, psychoanalysis, mental health care, substance abuse treatment, or other professional advice by legal, medical or other qualified professionals and that it is the Client's exclusive responsibility to seek such independent professional guidance as needed. If Client is currently under the care of a mental health professional, it is recommended that the Client promptly inform the mental health care provider of the nature and extent of the coaching relationship agreed upon by the Client and the Coach.
- F.** The Client understands that in order to enhance the coaching relationship, the Client agrees to communicate honestly, be open to feedback and assistance and to create the time and energy to participate fully in the program.

**Activity M7-6a-1****Handout 1: Analysis of Coaching Agreements- Sample A****2) Services**

The parties agree to engage in a \_\_\_\_\_ month Coaching Program through (describe method(s), e.g., in person, internet, telephone) meetings. Coach will be available to Client by e-mail and voicemail in between scheduled meetings as defined by the Coach (describe those terms here). Coach may also be available for additional time, per Client's request on a prorated basis rate of \_\_\_\_\_ (for example, reviewing documents, reading or writing reports, engaging in other Client related services outside of coaching hours).

**3) Confidentiality**

This coaching relationship, as well as all information (documented or verbal) that the Client shares with the Coach as part of this relationship will remain confidential between the client and the coach. However, please be aware that the Coach-Client relationship is not considered a legally confidential relationship (like the medical and legal professions) and thus communications are not subject to the protection of any legally recognized privilege. The Coach agrees not to disclose any information pertaining to the Client without the Client's written consent. The Coach will not disclose the Client's name as a reference without the Client's consent.

Exceptions: **Confidential Information** does **not** include information that: (a) was in the Coach's possession prior to its being furnished by the Client; (b) is generally known to the public or in the Client's industry; (c) is obtained by the Coach from a third party, without breach of any obligation to the Client; (d) is independently developed by the Coach without use of or reference to the Client's confidential information; or (e) the Coach is required by court order to disclose; (f) is disclosed to the Coach and as a result of such disclosure the Coach reasonably believes there to be an imminent or likely risk of danger or harm to the Client or others; and (g) involves illegal activity. The Client also acknowledges his or her continuing obligation to raise any confidentiality questions or concerns with the Coach in a timely manner.

According to the ethics of our profession, topics may be anonymously and hypothetically shared with other coaching professionals for training, supervision, mentoring, evaluation, and for coach professional development and / or consultation purposes.

**4) Cancellation Policy**

Client agrees that it is the Client's responsibility to notify the Coach \_\_\_\_\_ (number of) hours in advance of the scheduled calls / meetings. Coach reserves the right to bill Client for a missed meeting. Coach will attempt in good faith to reschedule the missed meeting.

**5) Termination**

Either the Client or the Coach may terminate this Agreement at any time with \_\_\_\_\_ # \_\_\_\_\_ weeks written notice. Client agrees to compensate the Coach for all coaching services rendered through and including the effective date of termination of the coaching relationship.

**Activity M7-6a-1****Handout 1: Analysis of Coaching Agreements- Sample A****6) Dispute Resolution**

If a dispute arises out of this Agreement that cannot be resolved by mutual consent, the Client and Coach agree to attempt to mediate in good faith for up to (certain amount of time such as 30 days) after notice given. If the dispute is not so resolved, and in the event of legal action, the prevailing party shall be entitled to recover attorney's fees and court costs from the other party.

**7) Applicable Law**

This Agreement shall be governed and construed in accordance with the laws of \_\_\_\_\_, without giving effect to any conflicts of laws provisions.

**Coach Name and Address:**

**Client Name and Address:**

**Signature: Date:**

**Signature: Date:**



**Activity M7-6a-2****Handout 2: Analysis of Coaching Agreements - Sample B****What is Executive Coaching?**

Executive Coaching is a collaborative, solution focused, results oriented and systematic process in which the coach facilitates the enhancement of work performance, self-directed learning and personal and professional growth.

**Executive Coaching Commitment**

This agreement provides the personal commitment of the coach and client towards the success of the coaching engagement.

In agreeing to a coaching relationship, we understand that coaching:

- ✦ May address specific projects, work performance, skill levels, and general conditions in your professional or private life as they impact on your workplace performance.
- ✦ Requires an active, collaborative approach - the coach plays the role of a facilitator of change, and the client enacts change by implementing the actions that have been agreed to in between each session.

**Coach Responsibilities**

Throughout our working relationship as your coach, I will:

- ✦ Apply current best knowledge and coaching practices.
- ✦ Provide a safe environment in which you can feel comfortable to share your background
- ✦ Provide a challenging learning environment to promote exploration, discovery and learning.
- ✦ Engage in direct, personal and sometimes challenging conversations either face-to face or by telephone, as jointly agreed.
- ✦ Assist you to determine the most useful and desired outcomes.
- ✦ Take a holistic, integral approach to coaching, partnering with you and/or your organisation to ensure all required support is provided.
- ✦ Seek feedback from you and review your coaching outcomes achieved against the goals set.

**Client Responsibilities**

Your coaching outcomes will be enhanced if you:

- ✦ Participate with an open mind and a readiness to move forward.
- ✦ Demonstrate a willingness to be actively involved and committed to coaching, have a genuine intent to change and be ready to work at creating change.
- ✦ Be open to receive, accept and act on feedback, be honest and forthright in our discussions and to raise and frankly discuss any issues that relate to the goals we are working on.
- ✦ Come willing to explore, challenge and change self defeating patterns and be willing to try new ways of behaving, learning and working.

**Activity M7-6a-2****Handout 2: Analysis of Coaching Agreements - Sample B**

- ✦ Give your permission to be challenged – to confront your thinking, behaviours and feelings during the coaching sessions in support of development goals.
- ✦ Jointly set activities to be carried out, and action these between sessions in order to obtain the full benefit from this coaching.
- ✦ Come prepared and on-time to all coaching sessions with interim activities completed.
- ✦ Let the coach know if the coaching isn't working for you

**Exceptions to Confidentiality**

By investing in your personal and professional development your organisation is recognising the value they place in you. If I am requested by your organisation, I will report in broad terms on the process and progress of coaching, but I will not report on the details and content of the sessions, unless you give your explicit permission. As required by the organisation, I will report any missed sessions, repeated failures to complete agreed tasks or lack of engagement in the coaching process.

**Ethics, Confidentiality Professional Practice**

- ✦ Any specific information discussed or issues raised during the course of coaching will be on a strictly confidential basis.
- ✦ I will maintain file notes on the progress of coaching sessions, and will ensure complete confidentiality of this information, except in rare circumstances where decreed by law or as agreed by you for a specified purpose.
- ✦ I will work within the professional coaching ethics & guidelines.
- ✦ I will satisfy all standard criteria set up to function as a professional coach.
- ✦ I will engage in monthly supervision of my coaching practice and will maintain my expertise as an evidence-based practitioner through professional development by accessing cutting edge research journals and attending workshops, training programs and conferences.

**Timing and Cancellations**

A minimum of 48 hours notice for cancellation is needed otherwise the full coaching fee will be incurred.

**Signatures**

Client \_\_\_\_\_

Coach \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

**Activity M7-6a-3****Handout 3: Analysis of Coaching Agreements - Sample C**

This agreement is made between \_\_\_\_\_ (“Coach”) and \_\_\_\_\_ (“Client”) on this \_\_\_\_\_ Day of \_\_\_\_\_ 20\_\_\_. Both parties agree to the following:

Coaching is a collaborative process with an ongoing relationship between the Client and Coach. The coaching experience supports the Client in establishing new behaviors. The coaching relationship is strengths-based, forward-looking, and collaborative. The coaching agenda is developed and implemented in partnership between the Client and Coach. The role of the Coach is to help the Client progress toward achieving a goal.

- ◆ The Client and Coach agree to engage fully in the coaching experience.
- ◆ The Client recognizes that coaching is not therapy, counseling, or consulting.

**Coaching Commitment**

By entering into this relationship, the Client and Coach acknowledge that the Client desires to make a behavioral change or some type of improvement in his or her life. Behavioral change often takes time to implement and sustain. The pace of change is uncertain and varies amongst individuals. As such, the Client and Coach agree to a minimum of a three-month relationship.

**Coaching Session Procedures**

Coaching sessions may occur in person, by phone, through video conference, or over email, depending on the venue that works best for the Client and what coaching package is selected.

- ◆ The Coach and Client agree to adhere to established appointment times.
- ◆ The Coach and Client agree to begin and finish all appointments on time. If the Client is more than 15 minutes late to an appointment, the Coach will assume that the appointment is canceled and the Client will be responsible for the full coaching fee. If the Coach is more than 15 minutes late to an appointment, the Client may assume that the session is canceled and the Client shall not be responsible for any payment for that session.
- ◆ The Client agrees to cancel or reschedule an appointment at least 24 hours in advance, without a

**Activity M7-6a-3****Handout 3: Analysis of Coaching Agreements - Sample C**

change fee. Any changes or cancellations within 24 hours are subject to a 50% cancellation fee.

**Coaching Fees**

- Specific coaching fees and packages are outlined in Schedule 1. For each of these packages, the Coach requests a three-month commitment from the Client. If the Client desires to terminate the relationship prior to three months, at least 30 days advance notice is required for a full refund of remaining sessions.
- Fees are payable at the first of the month, and prior to the coaching services being provided each month. Payments may be made by cash, check, credit card, or electronic funds transfer (EFT).

Coach Date

Client Date

**Schedule 1: Coaching Fees**

(Here the coach can insert various coaching packages, modalities, and prices.)

**Activity M7-6a-4****Handout 4: Analysis of Coaching Agreements - Sample D**

This agreement is between \_\_\_\_\_ and \_\_\_\_\_. Both parties agree to the following:

**COACHING SESSION PROCEDURES:**

Coaching sessions are conducted in-person, by telephone, telepresence (eg. Skype) or email.

- ◆ For clients local to \_\_\_\_\_, it is the Client's responsibility to initiate the coaching session by either arriving in-person at the scheduled time.
- ◆ For non-local clients, the Coach will contact the client at the scheduled time.

If the Client is more than 15 minutes late for the coaching session, the Coach will assume the session is cancelled and the Client will forfeit the session fee.

Cancelling and / or rescheduling a coaching session is easily done with appropriate notice. Please allow at least 24-hour notice to appointment changes.

The Coach has the right to terminate the coaching relationship at her discretion at any time and for any reason. If this occurs, the Coach will refund the Client any prepayment of coaching sessions that did not occur.

**CONFIDENTIALITY:**

The coaching relationship is built on trust. The Coach agrees to keep all information about and conversations with the Client private and confidential. No personal ideas, information, thoughts or experiences expressed by the Client will be shared with anyone without the permission of the Client. Confidentiality is the Client's right, regardless of who is paying the coaching fees. From time to time, the Coach may share the nature of the coaching session, **without any Client identifying details**, with either another coaching professional or mentor for the purpose of the Coach seeking guidance or with students and readers for educational purposes.

Confidentiality exceptions include:

1. Information requested through a court order or subpoena
2. If the Client is a danger to themselves or others
3. When there's more than one person present in the room listening to the coaching session (by prior consent of the client).
4. When the coaching session is being recorded (Coach is required to make Client aware and obtain permission from the client if the session is being recorded.)

**Activity M7-6a-4****Handout 4: Analysis of Coaching Agreements- Sample D****PAYMENT DETAILS:**

- ⦿ All fees are expressed in \_\_\_\_\_ and are to be paid in advance of each coaching session, per the agreed upon rates and dates.
- ⦿ Payments may be made by check, credit card or PayPal.
- ⦿ All packages must be completed within six months unless other arrangements are made.

If Client has chosen the payment plan option, the payment terms do not change if Client decides to postpone sessions. In the unlikely event that the Coach postpones sessions, the payment terms will adjust accordingly to accommodate Client.

**Client Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Trainer Resources

# Module 8

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## Key Performance Indicators

All resources are A4 size unless stated / Dotted line means to cut.

Activity M8-1-1	Handout 1 - Acronyms (one copy per participant)
Activity M8-3-1	Handout 1 - Purpose of KPIs (one copy per participant)
Activity M8-5-1	Handout 1 - Jagarth, 1st month (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-2	Handout 2 - Kapila, March Year 1 (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-3	Handout 3 - Gajnan and Lakshana, July / August Year 1 (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-4	Handout 4 - Jagarth, 2nd month (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-5	Handout 5 - Kapila, March Year 2 (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-6	Handout 6 - Gajnan and Lakshana, July / August Year 2 (one copy per participant for $\frac{1}{3}$ of the class)
Activity M8-5-7	Handout 7 - Jagarth, 1st month - Tutor Copy (one copy for trainer)
Activity M8-5-8	Handout 8 - Kapila, March Year 1 - Tutor Copy (one copy for trainer)
Activity M8-5-9	Handout 9 - Gajnan and Lakshana, July / August Year 1 - Tutor Copy (one copy for trainer)
Activity M8-5-10	Handout 10 - Jagarth, 2nd month - Tutor Copy (one copy for trainer)
Activity M8-5-11	Handout 11 - Kapila, March Year 2 - Tutor Copy (one copy for trainer)
Activity M8-5-12	Handout 12 - Gajnan and Lakshana, July / August Year 2 - Tutor Copy (one copy for trainer)

**Activity M8-1-1: Handout 1 - Acronyms**

What do these acronyms stand for?

1. K \_\_\_\_\_  
P \_\_\_\_\_  
I \_\_\_\_\_

2. S \_\_\_\_\_  
M \_\_\_\_\_  
A \_\_\_\_\_  
R \_\_\_\_\_  
T \_\_\_\_\_

3. T \_\_\_\_\_  
G \_\_\_\_\_  
R \_\_\_\_\_  
O \_\_\_\_\_  
W \_\_\_\_\_

4. S \_\_\_\_\_  
W \_\_\_\_\_  
O \_\_\_\_\_  
T \_\_\_\_\_



**Activity M8-3-1: Handout 1 - Purpose of KPIs**

A Key Performance Indicator (KPI) is a measurement tool. It measures performance over time, tracking changes.

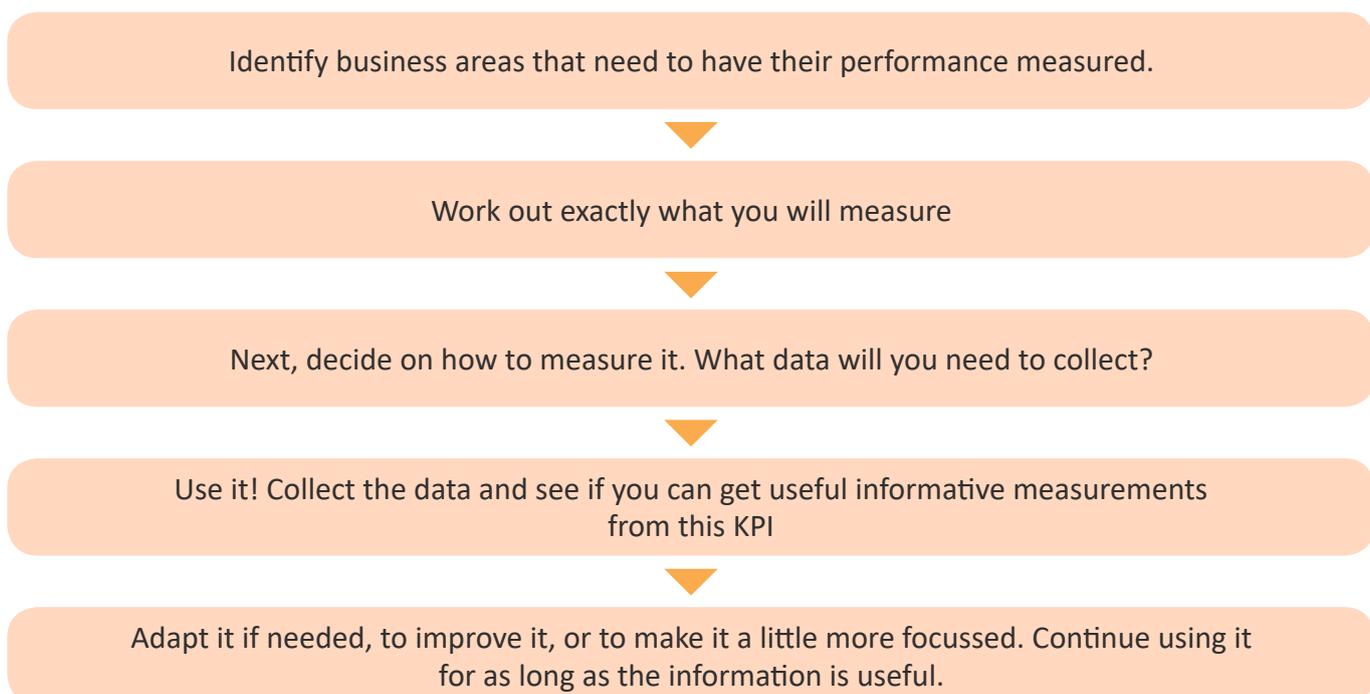
It can be applied to any and all areas of business activity. For example:.

- ✦ Product (e.g. number of X/Y/Z sold per quarter; feedback 0-10 on satisfaction with A/B/C).
- ✦ Marketing (e.g. % of direct bookings through own website, number of likes for Instagram page per month).
- ✦ HR Management (e.g. Average sales per staff member; % staff trained in first aid)
- ✦ Systems (e.g. number of jars of jam thrown out as past sell by date each quarter).
- ✦ Environmental Sustainability (e.g. number of plastic straws used per month)
- ✦ And so on.....

KPIs are useful because you can identify trends. For example, are you getting more sales per employee, or fewer? If the number is going down, have you got too many staff? Or do you need a more flexible shift system? Or do the sales staff need sales training? You can try an intervention (making a SMART objective), do it, and see if it has had the result you want.

Some KPIs are likely to always be worth looking at, like 'profit as a % of income'. Others, used to track a problem area, you don't necessarily need to keep tracking when you have identified the problem, fixed it, and seen that the fix has worked, through an improved performance.

The process of building and using KPIs looks like the flowchart below:





**Activity M8-5-1: Handout 1 - Jagarth - First Month**

Jagarth has now started his collective, so far only himself and the other two drivers, Dilshan and Sampath. They have a 'uniform', driving in typical surfing clothing. They have surf pictures painted on their jeeps. They have been driving up and down the street in Arugam Bay, with balloons on the jeeps, handing out flyers, and in fact, do this at least twice a week after sunset.

They have set the minimum drive at 3 hours, and the hire of a jeep is fixed at LKR6,000, for up to 8 passengers. LKR1,000 of this goes into the collective pot. This is what they managed in their first month:

	Jagarth		Dilshan		Sampath	
	Morning	Evening	Morning	Evening	Morning	Evening
1 (Monday)	X				X	
2				X		
3	X	X				X
4		X	X			
5					X	
6	X					
7				X		
8 (Monday)		X				
9				X		
10			X			X
11		X			X	
12			X			
13	X					X

**Activity M8-5-1: Handout 1 - Jagarth - First Month**

	Jagarth		Dilshan		Sampath	
	Morning	Evening	Morning	Evening	Morning	Evening
14	X			X		
15	X	X			X	
16		X				
17					X	
18			X			X
19				X		
20	X				X	X
21			X	X		X
22 (Monday)	X			X		
23					X	
24				X	X	
25	X	X	X			X
26		X	X		X	
27	X					X
28		X		X	X	

How much is contributed to the common pot, week by week?

How much does a driver in the collective earn on average per week, post the 'pot' deductions?

Has each driver contributed equally? Can you see this issue becoming a problem? What would you suggest to Jagarth?

**Activity M8-5-2: Handout 2 - Kapila, March Year 1**

Costs of running the villas:

1. Fixed costs (whether occupied or not): \$3,750/month
2. Variable costs (when occupied)
  - a. 1-2 guests                 \$25/night
  - b. 3,4 or 5 guests           \$35/night
  - c. 6, 7 or 8 guests         \$45/night

Income month of March, Year 1

Season	Date	Rooms occupied	People staying	Rental income
Mid-Season	1	3	5	600
	2			
	3	4	8	150 (last minute)
	4	4	8	150 (last minute)
	5			
	6			
	7	2	4	600
	8	2	5	600
	9	2	5	600
	10			
	11			
	12	4	6	150 (last minute)
Low Season	13	4	6	150 (last minute)
	14	4	6	150 (last minute)
	15			
	16	4	8	500
	17	4	8	500
	18			
	19	3	4	500

● **Activity M8-5-2:** Handout 2 - Kapila, March Year 1

Season	Date	Rooms occupied	People staying	Rental income
Low Season	20		4	150 (last minute)
	21	3	4	150 (last minute)
	22			
	23	4	6	150 (last minute)
	24			
	25	3	5	500
	26	3	5	500
	27			
	28	4	7	500
	29			
	30	3	6	150 (last minute)

**A.** Room occupancy rate (the KPI that Laurie is most interested in):

1. How many possible room nights are there in total (clue, how many rooms, how many nights)?
2. And how many room nights were actually used?
3. So, what is the percentage of room occupancy?

**B.** Now let's look at profitability and the profit as a percentage of income (a useful KPI).

1. The fixed cost of running this villa is ....?

**Activity M8-5-2: Handout 2 - Kapila, March Year 1**

2. And the variable costs are on a scale, so what is the total for March?
  3. So the total costs are ....?
  4. And the total income is ....?
  5. So the surplus is ....?
  6. What is the surplus as a percentage of income?
- C.** It's time to drill down a bit more and look at the last-minute rate.
1. How many nights was the villa occupied?
  2. So if you divide the fixed costs by the number of nights occupied, what figure do you get?
  3. And if you divide the total costs by the number of nights occupied, what is the figure then?
  4. What does this say to you about the last-minute rate of \$150?
  5. What strategies would you suggest for improving this situation?
  6. What KPIs will be of great interest, going forward?



**Activity M8-5-3: Handout 3: Gajnan and Lakshana, July / August Year 1**

The table below shows how many visits there were to each cabana over 2 months in year 1, and how many nights each visitor stayed.

From the numbers, answer the following questions:

1. Were there more visitors in July or August?
2. Did the visitors stay longer on average in July or August?
3. Which cabana had the highest number of visitors in each month?
4. Which cabana had the longer average stay per visitor for each month?
5. Which cabana appears to be a problem, one that you need to find out about?
6. What KPIs do you think you have been considering?

Cabana	July		August	
	Visitors	Nights stayed	Visitors	Nights stayed
1	6	3, 3, 2, 2, 3, 1	5	3, 4, 2, 2, 3
2	5	2, 1, 1, 2, 1	4	1, 3, 1, 1
3	4	3, 4, 2, 2	5	3, 2, 2, 2, 2

Secondly, your clients think that the visitors are not spending as long in the area as it deserves. Ampara is worth some time, Gal Oya at least two days, Rajagala a day, and then surely a day to relax as well? So, how can your clients encourage guests to stay longer, and how will they know if this has been successful? What KPI will tell them?



**Activity M8-5-4: Handout 4: Jagarth, 2nd Month**

These figures are enough to persuade Sampath's brother Rashen to join. Jagarth has also set up a Facebook page for the collective, now called 'Surfing with elephants', and a Google business page. He has opened a bank account for the mutual funds. Some hotels have started recommending the service to their guests, and there is more positive comment online, directed specifically at the collective. Unfortunately, Dilshan breaks his leg halfway through this period and will be out for a while.

	Jagarth		Dilshan		Sampath		Rashen	
	M	E	M	E	M	E	M	E
29 (Mon)			X			X	X	
30	X				X	X		
31			X				X	
1		X			X		X	
2	X		X					X
3	X		X					X
4		X		X	X			
5 (Mon)			X	X	X		X	
6	X		X			X		X
7	X	X	X				X	
8		X				X		
9		X				X		X
10			X		X		X	
11		X	X		X			X

**Activity M8-5-4: Handout 4: Jagarth, 2nd Month**

	Jagarth		Dilshan		Sampath		Rashen	
	M	E	M	E	M	E	M	E
12 (Mon)	X					X		X
13		X			X			
14	X	X				X	X	
15	X					X	X	X
16	X					X	X	
17					X			X
18	X	X			X	X	X	
19 (Mon)	X				X	X		X
20	X						X	X
21	X	X				X		
22		X			X		X	X
23					X	X	X	
24		X			X		X	X
25	X				X		X	X

How much is contributed to the common pot, week by week?

How much are the average earnings per driver, week by week, post the 'pot' deductions?

Has each driver contributed equally? Can you see this issue becoming a problem? What would you suggest to Jagarth?

**Activity M8-5-5: Handout 5: Kapila, March Year 2**

Kapila has managed to persuade Laurie to increase the last-minute rate from \$150 to \$250, and to cut the applicable time from 1 week before the booking date to 2 days before. He is sure that some people were just waiting to see the rate come down, while still having the luxury of booking a whole week in advance. Was he right?

Costs of running the villas:

1. Fixed costs (whether occupied or not): \$3,750/month
2. Variable costs (when occupied)
  - a. 1-2 guests \$25/night
  - b. 3,4 or 5 guests \$35/night
  - c. 6, 7 or 8 guests \$45/night

Income month of March, Year 2

Season	Date	Rooms occupied	People staying	Rental income
Mid-Season	1			
	2	3	5	600
	3	3	5	600
	4	3	5	600
	5			
	6			
	7			
	8			
	9	4	6	600
	10			
	11	3	6	250 (last minute)
	12	3	6	250 (last minute)
Low Season	13	3	6	250 (last minute)
	14			
	15			
	16	1	2	500

● **Activity M8-5-5: Handout 5: Kapila, March Year 2**

Season	Date	Rooms occupied	People staying	Rental income
Low Season	17	1	2	500
	18			
	19	4	8	250 (last minute)
	20			
	21	2	4	500
	22	2	4	500
	23			
	24			
	25			
	26	3	7	250 (last minute)
	27	3	6	250 (last minute)
	28	2	4	500
	29	2	4	500
	30			

A. Room occupancy rate (the KPI that Laurie is most interested in):

1. How many possible room nights are there in total (clue, how many rooms, how many nights)?
2. And how many room nights were actually used?
3. So, what is the percentage of room occupancy?

B. Now let's look at profitability and the profit as a percentage of income (a useful KPI).

1. The fixed cost of running this villa is ...?

**Activity M8-5-5: Handout 5: Kapila, March Year 2**

2. And the variable costs are on a scale, so what is the total for March?
  
  3. So the total costs are ....?
  
  4. And the total income is ....?
  
  5. So the surplus is ....?
  
  6. What is the surplus as a percentage of income?
- C. It's time to drill down a bit more and look at the last-minute rate.
1. How many nights was the villa occupied?
  
  2. So if you divide the fixed costs by the number of nights occupied, what figure do you get?
  
  3. And if you divide the total costs by the number of nights occupied, what is the figure then?
  
  4. What does this say to you about the last-minute rate of \$150?
  
  5. What strategies would you suggest for improving this situation?
  
  6. What KPIs will be of great interest, going forward?



### Activity M8-5-6: Handout 6: Gajnan and Lakshana, July / August Year 2

It is now one year later. Gajnan and Lakshana were delighted to hear your positive views of their natural inclination to use local materials for a local feel, and have built a common veranda area in traditional style, where guests can meet and share experiences, and, in fact, often choose to eat together. They have dammed their stream and filled the resultant pond with coy carp and catfish, which look lovely and eat the mosquito larvae. They also spray cabana 2 with mortein spray three hours before guests arrive there. They now find cabana 2 is popular for those who want to feed the fish with leftover bread from breakfast.

The table below shows how many visits there were to each cabana over 2 months in year 2, and how many nights each visitor stayed.

From the numbers, answer the following questions:

1. Were there more visitors in July or August?
2. Did the visitors stay longer on average in July or August?
3. Which cabana had the highest number of visitors in each month?
4. Which cabana had the longer average stay per visitor for each month?
5. How has the position changed since last year?
6. What KPIs would you like to consider going forward?

Cabana	July		August	
	Visitors	Nights stayed	Visitors	Nights stayed
1	6	4, 3, 2, 1, 3, 2	7	3, 2, 2, 2, 3, 4, 2
2	6	2, 3, 2, 3, 4, 1	6	2, 3, 1, 3, 5, 3
3	5	3, 3, 2, 4, 3	6	3, 2, 2, 2, 2, 4

Secondly, are customers overall spending longer than they did before? Why might this be? How can you find out for sure? What do you need to measure / keep measuring to consolidate this benefit?



**Activity M8-5-7: Handout 7: Jagarth 1st Month - Tutor Copy**

Jagarth has now started his collective, so far only himself and the other two drivers, Dilshan and Sampath. They have a 'uniform', driving in typical surfing clothing. They have surf pictures painted on their jeeps. They have been driving up and down the street in Arugam Bay, with balloons on the jeeps, handing out flyers, and in fact, do this at least twice a week after sunset.

They have set the minimum drive at 3 hours, and the hire of a jeep is fixed at LKR6,000, for up to 8 passengers. LKR1,000 of this goes into the collective pot. This is what they managed in their first month:

	Jagarth		Dilshan		Sampath	
	Morning	Evening	Morning	Evening	Morning	Evening
1 (Monday)	X				X	
2				X		
3	X	X				X
4		X	X			
5					X	
6	X					
7				X		
8 (Monday)		X				
9				X		
10			X			X
11		X			X	
12			X			
13	X					X
14	X			X		
15	X	X			X	

**Activity M8-5-7: Handout 7: Jagarth 1st Month - Tutor Copy**

	Jagarth		Dilshan		Sampath	
	Morning	Evening	Morning	Evening	Morning	Evening
16		X				
17					X	
18			X			X
19				X		
20	X				X	X
21			X	X		X
22 (Monday)	X			X		
23					X	
24				X	X	
25	X	X	X			X
26		X	X		X	
27	X					X
28		X		X	X	

How much is contributed to the common pot, week by week? (**Week 1: 11,000. Week 2: 11,000. Week 3: 14,000. Week 4: 17,000**)

How much are the average earnings per driver, week by week, post the 'pot' deductions? (**Week 1:  $5,000 \times 11 / 3 = 18,333$ . Week 2 the same. Week 3:  $5,000 \times 14 / 3 = 23,333$ . Week 4: 28,333**)

Has each driver contributed equally? Can you see this issue becoming a problem? What would you suggest to Jagarth? (**Jagarth 19 drives, Dilshan 16, Sampath 18. Probably not a problem yet, as the more you drive, the more you earn. But what about in the quiet months? Will payment from the collective pot be equal, or dependent on contribution into it? This needs to be considered now. What would you suggest?**)

**Activity M8-5-8: Handout 8: Kapila March Year 1 - Tutor Copy**

Handout 8: Kapila March Year 1 - Tutor Copy

Costs of running the villas:

1. Fixed costs (whether occupied or not): \$3,750/month

2. Variable costs (when occupied)

a. 1-2 guests \$25/night

b. 3,4 or 5 guests \$35/night

c. 6, 7 or 8 guests \$45/night

Season	Date	Rooms occupied	People staying	Rental income
Mid-Season	1	3	5	600
	2			
	3	4	8	150 (last minute)
	4	4	8	150 (last minute)
	5			
	6			
	7	2	4	600
	8	2	5	600
	9	2	5	600
	10			
	11			
	12	4	6	150 (last minute)
Low Season	13	4	6	150 (last minute)
	14	4	6	150 (last minute)
	15			
	16	4	8	500
	17	4	8	500

**Activity M8-5-8: Handout 8: Kapila March Year 1 - Tutor Copy**

Season	Date	Rooms occupied	People staying	Rental income
Low Season	18			
	19	3	4	500
	20	3	4	150 (last minute)
	21	3	4	150 (last minute)
	22			
	23	4	6	150 (last minute)
	24			
	25	3	5	500
	26	3	5	500
	27			
	28	4	7	500
	29			
	30	3	6	150 (last minute)

A. Room occupancy rate (the KPI that Laurie is most interested in):

1. How many possible room nights are there in total (**clue, how many rooms, how many nights**)? ( $30 \times 8 = 160$ )
2. And how many room nights were actually used? (**63**)
3. So, what is the percentage of room occupancy? (**39%**)

B. Now let's look at profitability and the profit as a percentage of income (a useful KPI).

1. The fixed cost of running this villa is ....? (**3,750**)
2. And the variable costs are on a scale, so what is the total for March? ( $[(25 \times 0) + (35 \times 9) + (45 \times 10)] = 765$ )
3. So the total costs are ....? ( $3,750 + 765 = 4,515$ )
4. And the total income is ....? ( $[(600 \times 4) + (500 \times 6) + (150 \times 9)] = 6,750$ )
5. So the surplus is ....? ( $6,750 - 4,515 = 2,235$ )
6. What is the surplus as a percentage of income? ( $2,235 \times 100 / 6,750 = 33\%$ )

**Activity M8-5-8: Handout 8: Kapila March Year 1 - Tutor Copy**

C. It's time to drill down a bit more, and look at the last-minute rate.

1. How many nights was the villa occupied? **(19)**
2. So if you divide the fixed costs by the number of nights occupied, what figure do you get? **(3,750 / 19 = 197)**
3. And if you divide the total costs by the number of nights occupied, what is the figure then? **(4,515 / 19 = 237) NB, it is this that captures complete cost.**
4. What does this say to you about the last-minute rate of \$150? **It doesn't come close to covering costs.**
5. What strategies would you suggest for improving this situation? **The last-minute offer has to be higher, even if it means getting fewer bookings. The current rate just loses money. This should also help with keeping the villa more exclusive, and reviews are likely to reflect this leading, ultimately, to more full-price bookings.**
6. What KPIs will be of great interest, going forward? **Not the room occupancy! The profit as a percentage of income is very interesting as it shows whether profitability is going up or down. The relationship between last-minute rate and total cost (currently -\$87) is going to be one to watch, too.**



**Activity M8-5-9: Handout 9: Gajnan and Lakshana, July / August Year 1 - Tutor Copy**

**TUTOR 1:**

The table below shows how many visits there were to each cabana over 2 months, and how many nights each visitor stayed.

From the numbers, answer the following questions:

1. Were there more visitors in July or August?
2. Did the visitors stay longer on average in July or August?
3. Which cabana had the highest number of visitors in each month?
4. Which cabana had the longer average stay per visitor for each month?
5. Which cabana appears to be a problem, one that you need to find out about?
6. What KPIs do you think you have been considering?

	July		August	
Cabana	Visitors	Nights stayed	Visitors	Nights stayed
1	6	3, 3, 2, 2, 3, 1	5	3, 4, 2, 2, 3
2	5	2, 1, 1, 2, 1	4	1, 3, 1, 1
3	4	3, 4, 2, 2	5	3, 2, 2, 2, 2

Here are the calculations and answers:

	July	August
<b>C1</b>	$3+3+2+2+3+1 = 14$ $14/6 = 2.33$ nights/guest	$3+4+2+2+3 = 14$ $14/5 = 2.8$ nights/guest
<b>C2</b>	$2+1+1+2+1 = 7$ $7/5 = 1.4$ nights/guest	$1+3+1+1 = 6$ $6/4 = 1.5$ nights/guest
<b>C3</b>	$3+4+2+2 = 11$ $11/4 = 2.75$ nights/guest	$3+2+2+2+2 = 11$ $11/5 = 2.2$ nights/guest
<b>All</b>	$32/15 = 2.13$ nights/guest	$31/14 = 2.21$ nights/guest

**● Activity M8-5-9: Handout 9: Gajnan and Lakshana, July / August Year 1 - Tutor Copy**

1. July (15, Aug = 14)
2. August (2.21 nights, July = 2.13 nights)
3. Cabana 1 in July, Cabanas 1 & 3 in August
4. Cabana 3 in July, Cabana 1 in August
5. Cabana 2. Why do people stay a much shorter time?
6. Guests per month, and guests per cabana per month. Also length of stay per month, and length of stay per cabana per month.

Secondly, your clients think that the visitors are not spending as long in the area as it deserves. Ampara is worth some time, Gal Oya at least two days, Rajagala a day, and then surely a day to relax as well? So, how can your clients encourage guests to stay longer, and how will they know if this has been successful? What KPI will tell them?

**Firstly, get the common area done, in traditional materials, and encourage guests to socialise there. They will swap stories and recommendations, learning about things to visit from each other. Some will (hopefully) extend their stay as a result.**

**Activity M8-5-10: Handout 10: Jagarth 2nd Month - Tutor Copy**

These figures are enough to persuade Sampath's brother, Rashen, to join. Jagarth has also set up a Facebook page for the collective, now called 'Surfing with elephants', and a Google business page. He has opened a bank account for the mutual funds. Some hotels have started recommending the service to their guests, and there is more positive comment online, directed specifically at the collective. Unfortunately, Dilshan breaks his leg halfway through this period and will be out for a while.

	Jagarth		Dilshan		Sampath		Rashen	
	M	E	M	E	M	E	M	E
29 (Mon)			X			X	X	
30	X				X	X		
31			X				X	
1		X			X		X	
2	X		X					X
3	X		X					X
4		X		X	X			
5 (Mon)			X	X	X		X	
6	X		X			X		X
7	X	X	X				X	
8		X				X		
9		X				X		X
10			X		X		X	
11		X	X		X			X
12 (Mon)	X					X		X
13		X			X			

**Activity M8-5-10: Handout 10: Jagarth 2nd Month - Tutor Copy**

	Jagarth		Dilshan		Sampath		Rashen	
	M	E	M	E	M	E	M	E
14	X	X				X	X	
15	X					X	X	X
16	X					X	X	
17					X			X
18	X	X			X	X	X	
19 (Mon)	X				X	X		X
20	X						X	X
21	X	X				X		
22		X			X		X	X
23					X	X	X	
24		X			X		X	X
25	X				X		X	X

How much is contributed to the common pot, week by week? (**Week 1: 20,000. Week 2: 24,000. Week 3: 24,000. Week 4: 25,000**)

How much are the average earnings per driver, week by week, post the 'pot' deductions? (**Week 1:  $5,000 \times 20 / 4 = 25,000$ . Week 2:  $5,000 \times 24 / 4 = 30,000$ . Week 3:  $5,000 \times 24 / 3 = 40,000$ . Week 4:  $5,000 \times 25 / 3 = 41,666$** )

Has each driver contributed equally? Can you see this issue becoming a problem? What would you suggest to Jagarth? (**Clearly, it is unequal this month. Jagarth 26 trips, Dilshan 11, Sampath 27, Rashen 28. Should Dilshan be receiving from the 'pot' now that he cannot earn? Just what are the policies for the 'pot'. As a coach, you can't set these, but you can suggest alternatives. What would you suggest; NB, suggest, not recommend! So, while average income per driver per month is important for recruitment into the collective. Precise earnings (and work done) per driver per month will also be important, for working out what to do with the 'pot'.**)

**Activity M8-5-11: Handout 11: Kapila, March Year 2 - Tutor Copy**

Costs of running the villas:

1. Fixed costs (whether occupied or not): \$3,750/month

2. Variable costs (when occupied)

a. 1-2 guests \$25/night

b. 3,4 or 5 guests \$35/night

c. 6, 7 or 8 guests \$45/night

Income month of March, Year 2

Season	Date	Rooms occupied	People staying	Rental income
Mid-Season	1			
	2	3	5	600
	3	3	5	600
	4	3	5	600
	5			
	6			
	7			
	8			
	9	4	6	600
	10			
	11	3	6	250 (last minute)
	12	3	6	250 (last minute)
Low Season	13	3	6	250 (last minute)
	14			
	15			
	16	1	2	500
	17	1	2	500
	18			

**Activity M8-5-11: Handout 11: Kapila, March Year 2 - Tutor Copy**

Season	Date	Rooms occupied	People staying	Rental income
Low Season	19	4	8	250 (last minute)
	20			
	21	2	4	500
	22	2	4	500
	23			
	24			
	25			
	26	3	7	250 (last minute)
	27	3	6	250 (last minute)
	28	2	4	500
	29	2	4	500
	30			

A. Room occupancy rate (the KPI that Laurie is most interested in):

1. How many possible room nights are there in total (**clue, how many rooms, how many nights**)? ( $30 \times 8 = 160$ , no change.)
2. And how many room nights were actually used? (**42**)
3. So, what is the percentage of room occupancy? (**26%, a significant fall**)

B. Now let's look at profitability and the profit as a percentage of income (a useful KPI).

1. The fixed cost of running this villa is ....? (**3,750, no change**)
2. And the variable costs are on a scale, so what is the total for March? ( $[25 \times 2] + [35 \times 7] + [45 \times 7] = 600$ , a fall)
3. So the total costs are ....? ( **$3,750 + 600 = 4,350$** )
4. And the total income is ....? ( $[600 \times 4] + [500 \times 6] + [250 \times 6] = 6,900$ . Note the nights at 600 and nights at 500 are the same, and the nights at the last-minute rate have cut by 1/3, but still, as that rate has gone up, so has the total income.)
5. So the surplus is ....? ( **$6,900 - 4,350 = 2,550$** )
6. What is the surplus as a percentage of income? ( **$2,550 \times 100 / 6,900 = 37\%$** )

**Activity M8-5-11: Handout 11: Kapila, March Year 2 - Tutor Copy**

C. It's time to drill down a bit more and look at the last-minute rate.

1. How many nights was the villa occupied? **(16)**
2. So if you divide the fixed costs by the number of nights occupied, what figure do you get? **(3,750 / 16 = 234)**
3. And if you divide the total costs by the number of nights occupied, what is the figure then? **(4,350 / 16 = 272)**
4. What does this say to you about the last-minute rate of \$250? **It comes a lot closer to covering costs. The relationship between last-minute rate and total cost has gone from -\$87 to -\$22. At least the fixed costs are being covered.**
5. What strategies would you suggest for improving this situation? **The last-minute offer could probably be increased further, say to \$300. You may want to wait a further year, though? That's to discuss. Hopefully, you will have succeeded in making your exclusivity a little more clear, and you will get more full-price bookings. That is probably of primary importance now.**
6. What KPIs will be of great interest, going forward? **Not the room occupancy! This exercise has shown that it is not particularly relevant here, however important it is to hotels. The profitability and the relationship between last-minute rates and costs should continue to get focus.**



**Activity M8-5-12: Handout 6: Gajnan and Lakshana, July / August Year 2**

**TUTOR 2:**

It is now one year later. Gajnan and Lakshana were delighted to hear your positive views of their natural inclination to use local materials for a local feel, and have built a common veranda area in traditional style, where guests can meet and share experiences, and, in fact, often choose to eat together.

They have addressed the mosquito issue with cabana 2, and dammed their stream, filling the resultant pond with coy carp and catfish, which look lovely and eat the mosquito larvae. They also spray cabana 2 with mortein spray three hours before guests arrive there. They now find cabana 2 is popular for those who want to feed the fish with leftover bread from breakfast.

The table below shows how many visits there were to each cabana over 2 months in year 2, and how many nights each visitor stayed.

From the numbers, answer the following questions:

1. Were there more visitors in July or August?
2. Did the visitors stay longer on average in July or August?
3. Which cabana had the highest number of visitors in each month?
4. Which cabana had the longer average stay per visitor for each month?
5. How has the position changed since last year?
6. What KPIs would you like to consider going forward?

Cabana	July		August	
	Visitors	Nights stayed	Visitors	Nights stayed
1	6	4, 3, 2, 1, 3, 2	7	3, 2, 2, 2, 3, 4, 2
2	6	2, 3, 2, 3, 4, 1	6	2, 3, 1, 3, 5, 3
3	5	3, 3, 2, 4, 3	6	3, 2, 2, 2, 2, 4

● **Activity M8-5-12:** Handout 6: Gajnan and Lakshana, July / August Year 2

Here are the calculations and answers:

	July	August
C1	$4+3+2+1+3+2 = 15$ $15/6 = 2.5$ nights/guest	$3+2+2+2+3+4+2 = 18$ $18/7 = 2.6$ nights/guest
C2	$2+3+2+3+4+1 = 15$ $15/7 = 2.1$ nights/guest	$2+3+1+3+5+3 = 17$ $17/6 = 2.8$ nights/guest
C3	$3+3+2+4+3 = 15$ $15/5 = 3.0$ nights/guest	$3+2+2+2+2+4 = 15$ $15/6 = 2.2$ nights/guest
All	$45/18 = 2.5$ nights/guest	$50/19 = 2.6$ nights/guest

1. August (19, July = 17)
2. August (2.6 nights, July = 2.5 nights)
3. Cabanas 1 & 2 in July, Cabana 1 in August
4. Cabana 3 in July, Cabana 2 in August
5. Cabana 2 is no longer a problem. It is as likely to be the best performing cabana as the others.
6. Apart from continuing with the same, all seems to be going well, so it's a question of capitalizing on that. Therefore customer surveys monitor satisfaction levels with various aspects of service.

Secondly, are customers overall spending longer than they did before? **Yes, it's gone from a bit over 2 nights to a bit over 2.5 nights average, but let's try and get it up to 3 nights!** Why might this be? **Hopefully, the common area has helped.** How can you find out for sure? Customer surveys. What do you need to measure / keep measuring to consolidate this benefit? **Keep looking at average nights stay per customer(s).**

Trainer Resources

# Module 9

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**Business Coaching in Practice**

All resources are A4 size unless stated. Dotted line means to cut.

Activity M9-1-1	Handout 1 - The Coaching Journey (one copy per group, cut up)
Activity M9-2b-1	Handout 1 - Singing Fish Guesthouse - Booking.com (one copy each for half the class)
Activity M9-2b-2	Handout 2 - Singing Fish Guesthouse - TripAdvisor (one copy each for half the class)
Activity M9-2b-3	Handout 3 - Basic Information Form: Part Two (one copy for each pair if there is no projector. If projector is working, no copies)
Activity M9-3-1	Handout 1 - Basic Information Form: Part One (one copy each for half the class)
Activity M9-3-2	Handout 2 - Role card for Kannan (one copy for each for half the class)
Activity M9-4a-1	Handout 1 - Baseline Profile Form (a single copy for trainer)
Activity M9-4a-2	Handout 2 - Hospitality Key Performance Indicators (a single copy for trainer)
Activity M9-4b-3	Handout 3 - Sample Indicators (one copy each for half the class)
Activity M9-4b-4	Handout 4 - Sample OPI Rankings (one copy each for half the class)
Activity M9-4b-5	Handout 5 - Coach's Role Play Card (one copy each for half the class)
Activity M9-4b-6	Handout 6 - Kannan's Role Play Card (one copy each for half the class)
Activity M9-5b-1	Handout 1 - KPI Tracking Form (one copy per participant)
Activity M9-6b-1	Handout 1 - Action and Skills Development Plan (one copy per participant)

**Activity M9-1-1: Handout 1 - The Coaching Journey****Prepare and Plan**

Plan for your coaching process and research your client and their business sector.

**Set the Tone**

During your first meeting, get to know your client, create good rapport and win your client's trust

**Lay the Foundation**

Explain your credentials, how the process of coaching works, the style of delivery, roles of coach and client.

**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.

**Assess the client's current business situation**

You may need to use different business analytical tools to ascertain the situation eg. SWOT analysis to determine where the client is now. Assess their strengths and weaknesses.



**Activity M9-1-1: Handout 1 - The Coaching Journey****Ascertain desired goals**

Find out from the client what they are hoping to get from this coaching session and from this coaching session and where they would like to be at the end of the coaching session.

**Look for Options**

Evaluate the advantages and disadvantages of the number of options available

**Set SMART goals**

Work with client to set SMART goals with clear action points. Set realistic actions with achievable time frames for them.

**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.

**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'.



### ● Activity M9-2b-1: Handout 1- Singing Fish Guesthouse – Booking.com

123 Trincomalee Road, Batticaloa

Double room with a/c, wifi, balcony, garden view, private bathroom with shower, flat screen TV	LKR 4,700
Double room with fan, wifi, balcony, road view, private bathroom with shower, flat screen TV	LKR 4,300
Single room with fan, wifi, garden or road view, private bathroom but communal shower.	LKR 3,500

There is a lounge / eating area for guests to use, with steps down to the garden. There are plastic chairs to take outside, but no shade other than from the trees. The lounge area has a sofa and four armchairs. There are four tables in the eating area, each with three plastic chairs.

Rates are for bed & breakfast. Dinner can be arranged, with advance notice. It will be rice and curry.

The rating on Booking.com is 7.8. The ratings for separate areas making this up are:

◆ Staff	9.1
◆ Value for money	9.1
◆ Wifi	6.0
◆ Cleanliness	7.2
◆ Comfort	7.1
◆ Location	8.8
◆ Facilities	7.8

Booking.com has this message from the owner, Kannan:

Singing Fish Guesthouse is located in the hart of Batticaloa. It is very cheaper than another guesthouses and very more luxury. It is easy to take tuktuk to famous beaches at Pasikudha or another beaches. Also, Batti has many nice things for seeing and is famous for its singing fish too that is why we name the guesthouse singing fish after singing fish in Batticaloa. Me and my wife are very much look forward to you visit! You will very much enjoy!

Here are some extracts from the reviews on Booking.com

I wish I had paid a little extra for a bigger room because the single room was pretty small, with lots of mosquitos, and really a bigger room isn't much extra. But Kannan and his family were so kind and welcoming! And such a tasty breakfast by Nadanam! (Gerard, Holland)

...but when I looked under the bed it was very dirty, and I had to ask Kannan's very helpful daughter to clean the sink because it had some black stuff. My boyfriend had a problem with mosquitos but they always go for him, haha! (Jennifer, Australia)

The location in Batti is really handy, and we enjoyed a day in Pasikudah, which is a GREAT beach. We were tired when we got back, though, and hadn't ordered dinner, so had to go out. Kannan made a good suggestion, but we were too tired to really enjoy it. (Hans, Germany)



## ● Activity M9-2b-2: Handout 2- Singing Fish Guest House – TripAdvisor

123 Trincomalee Road, Batticaloa

# 4 of 9 hotels in Batticaloa

The cheapest room is LKR 3,500. If you try booking you are directed to Booking.com

3.2 Average, with 24 reviews.

📍 Location	4.5
🧼 Cleanliness	3.0
👤 Service	4.5
💰 Value	4.0

### Property Amenities

🅑 Free Parking	📶 Wifi
🍴 Restaurant	✈️ Airport Transportation

### Room features

☀️ Air conditioning	🍽️ Room service
---------------------	-----------------

### Room types

🚭 Non-smoking rooms	🛏️ Family rooms
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From the reviews:

Kannan and all his family were so very helpful. There were some mosquitos at night, and my room did smell of cigarettes, and it wasn't perfectly clean, but the breakfast was great. We ate out in the evening but I'm sure we could have had a better meal in the guesthouse. We just didn't know to order in advance. (David, UK)

I really had a problem with the wifi. It didn't reach my room very well, and I had an important meeting I had to do in the middle of the breakfast table, which wasn't ideal. We chose an a/c room which was nice. Definitely you need a/c as a couple from Spain told us their room didn't have it and they got bitten in the night. Lovely breakfast, by the way! (Jennifer, Canada)

I was fooled by Trip Advisor saying there's room service. There isn't! I was with my sister who needs to lie down a lot. But Kannan was great, and went out of his way to fix things for her. (Bruce, UK)

Kannan and his family are great! And the location is really handy for everything in Batticaloa, and not too far, really, from the beach. Superb breakfast; why don't they offer dinner? (Stephen, Ireland).



**● Activity M9-2b-3: Handout 3 - Basic Information Form - Part Two**

This section is for the coach to research, mostly online. In the case of a startup, there may be no information to fill in here. For operational businesses, this is the coach's first chance to ascertain how the business is perceived. The findings should be shared with the client as early as possible in the coaching relationship, and can be adjusted as a result.

1. Does the business have its own website? If yes, please comment on how attractive it is, how informative, and how easy to navigate.

2. Does the business have a presence on third party sites such as Tripadvisor, Booking.com, Google (incl Google Maps)? If yes, mention which sites and how easy it is to find.

3. Is there any online feedback on the business in any of the above sites? Summarise the feedback.



**Activity M9-3-1: Handout 1 - Basic Information Form- Part One**
**A. Details of Client**

1. Full name of the client												
2. Designation	Owner		Manager		Other (please specify)							
3. Email												
4. Mobile Number												
5. Landline												
6. NIC No												

**B. Basic Information of Business**

7. Name of the business:				
8. Address:				
9. Legal status:	Registered		Not registered	
10. Details of registration	<b>Institution</b>	$\checkmark$ or X	<b>Location</b>	<b>Registration No.</b>
	Divisional Secretariat Office			
	Pradeshiya Sabha (Trade licence)			
	Sri Lanka Tourism Development Authority (SLTDA)			
	Registrar of companies			

**Activity M9-3-1: Handout 1 - Basic Information Form- Part One**
**C. Business Profile**

11. Type of business (brief description of business type and activity, and period of operation)

12. Size of business (multiple locations? Number of units such as rooms, jeeps? Turnover?)

13. Customer profile (local / overseas / mixture? Numbers per week / month / year?)

**D. Staffing and Skills Data**

14. How many people are currently employed? (enter numbers)

Family members				Full time staff				Part time staff			
Male		Female		Male		Female		Male		Female	

**Activity M9-3-1: Handout 1 - Basic Information Form- Part One**

15. Is this the normal staffing level, or are there more / fewer staff at different times of year?

16. Does the business employ any people with disabilities?

Yes		No	
-----	--	----	--

If yes, provide details below

17. Do employees come from a variety of communities? (Sinhalese, Tamil, Muslim, Burgher)

18. Have the employees participated in any skills development training in the last four years?

Yes		No	
-----	--	----	--

19. Has the client him / herself participated in any skill development training in the last four years?

Yes		No	
-----	--	----	--



**Activity M9-3-2: Handout 2 - Role Card for Kannan**

You are Kannan Raveendranath, owner of the Singing Fish Guesthouse, 123 Trincomalee Road, Batticaloa. You have a trade license from the Pradeshiya Sabha, but are not otherwise registered. You run the guesthouse with your wife and daughter. You have three categories of room, and three of each, giving a total of nine rooms.

Your customers are a mixture of local and foreign. The locals are usually business people, or sometimes families on a holiday. Foreign visitors are mostly tourists, with some NGO workers. Customers can book direct, or through Booking.com. Direct bookings come by email (singing.fish@gmail.com) or phone (07788654321). You are on TripAdvisor, too, and want to be on Google and Google Maps, but you're not sure how to do this.

You would like to improve your standards so you can get higher value customers who will pay more, and you think this may mean moving more towards the overseas guests. You and your family love meeting people from around the world, which is an added motivation. You are aware that your English is a little weak, as is that of your wife and daughter. You are a little sensitive about this, as you did go to St Michael's in Batticaloa. You also feel yourself to be a little weak in accounting, and in marketing. To be honest, marketing is a closed book to you. Nobody has had any sort of professional guidance or training, ever!



### Activity M9-4a-1: Handout 1 - Baseline Profile Form

<b>Business Name:</b>	
<b>Business Activity:</b>	
<b>Location:</b>	
<b>Client Name:</b>	
<b>Client Designation:</b>	
<b>Client Telephone:</b>	
<b>Client Email:</b>	
<b>Alternative Contact:</b>	

## Operational Performance Indicators (OPIs)

Categories for OPIs include:

- ✦ Product
- ✦ Operations
- ✦ Marketing
- ✦ Human Resource Management
- ✦ Operational Systems
- ✦ Environmental Sustainability
- ✦ Other

Please refer to the web page <http://bit.ly/S4IG-kpis> for sets of OPIs relating to a variety of business types of MSMEs in the tourism and hospitality sector. These include restaurants, accommodation, spas, tours, water sports and others. These can be used as written, or adapted. You may cut some that do not apply to your client's business, or create others. You may add or delete lines to the form as a result.

Each indicator is scored against a standardised scale 6 point scale, with 5 being the best:

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

Standardised guidelines exist for many of the sets of OPIs listed above. Again, these can be adapted or changed. They should only be scored in consultation with the client.

The OPIs should be scored as a baseline study as early as possible during the coaching relationship, and again at the end. If the coaching relationship lasts a sufficiently long period an intermediate scoring is also recommended. This may mean over a year for a hotel, or over six months for a restaurant, for example. This is to be decided with the client.

**Activity M9-4a-1: Handout 1 - Baseline Profile Form**

## Operational Performance Indicators (OPIs)

	OPI	Description	Coaching Session Number:		
			One (baseline)	-----	-----
<b>Product</b>					
1.					
2.					
3.					
4.					
5.					
<b>Marketing</b>					
6.					
7.					
8.					
9.					
10.					
<b>Operations / Systems</b>					
11.					
12.					
13.					
14.					
15.					

**Activity M9-4a-1: Handout 1 - Baseline Profile Form**

Human Resource Management					
16.					
17.					
18.					
Environmental Sustainability					
19.					
20.					
21.					
Other					
22.					
23.					
24.					

### Activity M9-4a-1: Handout 1 - Baseline Profile Form

#### Business and Employment Indicators (BEIs)

The measurements for BEIs may be a Yes / No choice (is the business registered with SLTDA?), or a numerical value (how many female employees are there?). Some are reports on trends over time and are given a quantitative value or percentage. It is often these that will lead to the drafting of business-specific KPIs to investigate aspects of business performance.

#### Business and Employment Indicators

Business / Employment Indicator	Description	One (baseline)	-----	-----
<b>Business Set Up &amp; Profile:</b>				
Business license	Does the business have any type of business registration? Yes / No			
Bank account	Does the business have a bank account? Yes / No			
SLTDA registration	Is the business registered with the SLTDA? Yes / No			
Tripadvisor rating	Score out of 5:			
Tripadvisor ranking	For example, 5/36:			
Other rating (specify)	Score out of ____:			
Other ranking (specify)	For example, 5/36:			
<b>Business Activity:</b>				
Distribution channels	How many OTAs, travel agents etc. distribute the product:			
Sales level	Number of units sold per quarter (room nights/tours/meals/etc.) <sup>1</sup>			
Sales diversity	Percentage of sales from non-core activity <sup>2</sup> : %			
Income per quarter	(from all sales, core & non-core): LKR			
Expenses per quarter	(materials, transport, employees etc): LKR			

<sup>1</sup> Only consider the main line of business.

<sup>2</sup> For example a hotel will also usually earn from food & beverages, plus possibly a shop.

**Activity M9-4a-1: Handout 1 - Baseline Profile Form**

Employment				
Employees (male)	Number:			
Employees (female)	Number:			
Living with disabilities	Number of male employees with disabilities:			
Living with disabilities	Number of female employees with disabilities:			
Skills certificates	Number of male employees with certificates:			
Skills certificates	Number of female employees with certificates:			

**Business Life Cycle**

Based on all the information gathered in both parts of this form, and the information in the Basic Information Form, the business appears to be at which stage in the Business Life Cycle? Tick the box you and your client agree on.

	One (baseline)	-----	-----
Concept			
Start-up			
Growth			
Maturity			
Renewal			
Decline			

**Sign off**

This form is agreed between client and coach. The coach pledges not to reveal any financial or other business information learned during the course of the coaching.

\_\_\_\_\_

Client name and signature

\_\_\_\_\_

Coach name and signature



**Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

Hospitality Key Performance Guidelines							
	Indicators	Ranking					
		N/A	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
Site & Building							
OPI 1	Site & construction appearance (access, entrance, garden, beach, parking, view, building design and material used)	project	land dispute, no view, far from everything, bad access, cement, bad design	far from everything, poor design, not much activity around, minimal view	okay view, moderate distance to everything, average appearance	good view, water access, local material design, site optimized	world-class location, luxury design, quality material, amazing view from the accom.
OPI 2	Quality standards - bedroom/ (size, view, decoration, bedding & linen, furniture and light)	project	small, no view, no decoration, low quality furniture & equipment. Does not meet minimum standard	very small windows, basic furniture and equipment, poor or no decoration but clean. Misses minimum standards	acceptable view, decoration and meets minimum standards	exceed standards on some of the points, nice decorations and view	exceeds minimum standard on most of the points; exceptional quality furniture and decoration
OPI 3	Quality standards- bathroom (water, toilet & shower, size & comfort)	project	very small, no running water, bare concrete; under minimum standard	small, concrete, not comfortable; under minimum standards	meets minimum standards	spacious, light, comfortable, well equipped several points over minimum standards	exceptional design, concept harmony, quality, well over minimum standards

**Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
OPI 4	Quality Standard - Reception/ Dining Facilities: Size, view, first impression, decoration, cleanliness	no reception and no dining	no reception, and dining place not appropriate	reception and dining but bad first impression	reception and dining acceptable first impression and cleanliness	reception and dining acceptable nice decoration and set up	first impression is astonishing
OPI 5	Level of maintenance (site and buildings)	not operating at all	rusty, dirty, old, water leaking, paint peeling, broken items	getting old, looking 'tired', or looking unfinished	no major fixes needed	well maintained with nothing major to be fixed	brand new or very well maintained
OPI 6	Facilities are accessible for persons with disabilities. The site, buildings, room and bathroom are accessible for person in a wheel chair	project	no accessibility awareness	no accessibility consideration	main building and toilet are accessible but no room	main building and toilet are accessible and some rooms and bathrooms	fully accessible

● **Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
Marketing							
OPI 7	Business plan, written business plan, budget, product concept, development strategy	nothing	vague ideas of project nothing in writing	clear ideas of what to do but nothing in writing	basic concept plan, or business plan partially implemented	implemented Business plan	concept plan, business plan and budget fully implemented
OPI 8	Marketing material (brochure, business cards, photos/video, guest book, accommodation description, activity descriptions, professional certificates Booking.com, Trip Advisor etc..)	not operating	nothing	guestbook, no professional photos or description	brochure or business card, product description, a few nice photos	most of the material	all material in good condition, updated and in use
OPI 9	Advertising and Web performance: national websites, Trip Advisor, own website, Facebook Pro, Google Maps, National Geographic, provincial website, social media, tradeshow, guides	not operating	no advertising or internet presenc	present in a few web sites (Trip Advisor and Facebook) but not pro-active	own web site + Facebook + Trip Advisor; trying to be active	own web site + Facebook + Trip Advisor + national web site + Google; active on internet	own web site + Facebook + Trip Advisor + national web site + Google; active on internet + advertising, tradeshow and networkin

**Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
OPI 10	Distribution channels: Agoda, Booking.com, Expedia, Neverbeen.com, Airbnb, Flickkey, Trip Advisor, own booking online, international wholesalers, domestic wholesalers, equipped with channel manager and integration with PMS	not distributed	0-1 channels but not active	2 to 5 channels	6 to 10 channels	More than 10 channels with channel management	More than 10 channels, with channel manager and integration to Property Management System
OPI 11	Tariff Management: tariff available and appropriate to services offered for accommodation/ restaurant/tours. Master season price, commission system and local & corporate rates & low season promotion rates	no tariff	basic tariff, oral	basic tariff, written	multiple tariffs for domestic & international + a few promotions; understands commission system	multiple tariffs for domestic & international + low season & active promotions	multiple tariffs for domestic & international + low season & active promotions; pro-active management of the tariffs

● **Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
<b>Operation</b>							
OPI 12	Human Resource Management; women employment, inclusiveness, part-time jobs & flexible roster, seasonality adaptation, on the job training, internal promotion	no employee	does not understand the concept	basic payroll and staff planning	basic payroll + roster + some training	manage its employees with key human resources rules	positive human resource management
OPI 13	Staff performance (quality of guest relations, housekeeping performance, waitress performance, level of hygiene, grooming & uniform, level of training & knowledge)	not operating	not qualified, poor English, bad customer service	basic services but quality & hygiene still minimal	basic services are covered professionally	good communications; customer services are covered professionally, with good hygiene & uniforms	exceptional communication skills, quality customer service, perfect grooming & hygiene
OPI 14	Customer service level: Tour desk/tour book, internet access, English communication, transport service, front office, daily housekeeping, laundry service, welcoming drink, bar, room service, free activities, outside towels	not operating	minimum service for B&B	A few additional services provided	can organise tours, drinks. Daily housekeeping and Internet	most of the services for mid-range hotels are provided	most of the services for 3 star hotels are provided

**Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
OPI 15	Booking system reservation book or reservation software, accuracy of booking, quality of information, occupancy ratio, organisation of files	not operating	by memory only	in a book or notepad	dedicated reservation book or Excel	Property Management System	online/ integrated Property Management System
OPI 16	Accounting system (income book, expenses book, receipts & invoices, monthly profit, accuracy of data)	no accounting	receipts sometimes	tries to maintain some book keeping but not yet accurate	detailed book keeping	accounting software	accounting system and accountant
OPI 17	Waste Management Plan and climate change adaptation: invest in water conservation, solar system and energy conservation	no waste management activities	some waste management activities	steps in place to manage waste more effectively (recycling/ compost etc.)	steps in place to manage waste more effectively (recycling/ compost etc.) + a few actions on water and energy	manage waste and invest in water and energy conservation	ecotourism and waste and energy conservation as part of the accom. concept

● **Activity M9-4a-2: Handout 2- Hospitality Key Performance Guidelines**

	Indicators	NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
Food & Services							
OPI 18	Kitchen facilities & hygiene (stove, fridge & freezer, organization, hygiene and cleanliness)	not operating	basic kitchen, hygiene not guaranteed	basic Sri Lankan kitchen with basic equipment	basic Sri Lankan kitchen, basic equipment, with basic hygiene and food security	well equipped kitchen, basic equipment with good hygiene and food security	professional kitchen
OPI 19	Food quality and authenticity (availability, choice, ingredients, taste, presentation)	not operating	basic rice & curry plate	a very few meal choices, dessert, drinks	some meal choices, dessert, drinks, but all standard and plain	effort in food preparation, choice and diversit	real menu and Sri Lankan authenticity



**Activity M9-4b-3: Handout 3 - Baseline Profile Form, Sample Indicators**

## Operational Performance Indicators (OPIs)

	OPI	Description	Coaching Session Number:		
			One (baseline)	-----	-----
<b>Product</b>					
2.	Quality Standards - Bedroom	Size, view, decoration, bedding and linen, furniture and light			
<b>Marketing</b>					
9	Advertising and web performance	National websites, Trip Advisor, own website, Facebook Pro, Google Maps, National Geographic provincial website, social media, trade shows, guides			
<b>Human Resource Management</b>					
14	Customer Service Level	Tour desk/tour book, internet access, English communication, transport service, front office, daily housekeeping, laundry service, welcoming drink, bar, room service, free activities, outside towels, room service			

**Activity M9-4b-3: Handout 3 - Baseline Profile Form, Sample Indicators**

Business and Employment Indicators

Business / Employment Indicator	Description	One (baseline)	-----	-----
<b>Business Set Up &amp; Profile:</b>				
Tripadvisor rating	Score out of 5:			
<b>Tripadvisor ranking</b>	<b>For example, 5/36:</b>			
<b>Business Activity:</b>				
Sales level	Number of units sold per quarter (room nights/tours/meals/etc.) <sup>3</sup>			
Sales diversity	Percentage of sales from non-core activity <sup>4</sup> : %			
Income per quarter	(from all sales, core & non-core): LKR			
Expenses per quarter	(materials, transport, employees etc): LKR			
<b>Employment:</b>				
Employees (male)	Number:			
Employees (female)	Number:			

<sup>3</sup>Only consider the main line of business.

<sup>4</sup>For example a hotel will also usually earn from food & beverages, plus possibly a shop.

**Activity M9-4b-3: Handout 3 - Baseline Profile Form, Sample Indicators**

### Business Life Cycle

Based on all the information gathered in both parts of this form, and the information in the Basic Information Form, the business appears to be at which stage in the Business Life Cycle? Tick the box you and your client agree on.

	One (baseline)	-----	-----
Concept			
Start-up			
Growth			
Maturity			
Renewal			
Decline			



**Activity M9-4b-4: Handout 4 - Sample OPI rankings**

	Indicators	Ranking					
		NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
<b>Site &amp; Building (Product)</b>							
OPI 2	Quality standards - bedroom/ (size, view, decoration, bedding & linen, furniture and light)	project	small, no view, no decoration, low quality furniture & equipment. Does not meet minimum standard	very small windows, basic furniture and equipment, poor or no decoration but clean. Misses minimum standards	acceptable view, decoration and meets minimum standards	exceed standards on some of the points, nice decorations and view	exceeds minimum standard on most of the points; exceptional quality furniture and decoration
<b>Marketing</b>							
OPI 9	Advertising and Web performance: national websites, Trip Advisor, own website, Facebook Pro, Google Maps, National Geographic, provincial website, social media, tradeshow, guides	not operating	no advertising or internet presence	present in a few web sites (Trip Advisor and Facebook) but not pro-active	own web site + Facebook + Trip Advisor; trying to be active	own web site + Facebook + Trip Advisor + national web site + Google; active on internet	own web site + Facebook + Trip Advisor + national web site + Google; active on internet + advertising, tradeshow and networking

● **Activity M9-4b-4: Handout 4 - Sample OPI rankings**

	Indicators	Ranking					
		NA	Basic	Progressive	Standard	Good	Very Good
		0	1	2	3	4	5
Operation							
OPI 14	Customer service level: Tour desk/tour book, internet access, English communication, transport service, front office, daily housekeeping, laundry service, welcoming drink, bar, room service, free activities, outside towels	not operating	minimum service for B&B	A few additional services provided	can organise tours, drinks. Daily housekeeping and Internet	most of the services for mid-range hotels are provided	most of the services for 3 star hotels are provided

**● Activity M9-4b-5: Handout 5 - Coach's Role Play Card**

You are yourself, and you are the business coach going to meet Kannan Raveendranath for your first visit to The Singing Fish Guesthouse.

Very quickly, look back at Module 6, Activity 2, First steps. You will just spend 5 minutes setting the tone and laying the foundation today.

More importantly, you should remind yourself of the Basic Information Form, and what is on Booking.com & Trip Advisor. You may like to remind yourself of the issues, and prepare what you will ask about them to get further information. Make notes here. Focus on OPIs 2, 9 & 14, and some of the BEIs. Finally, you will need to decide where Kannan's business is in the Business Life Cycle. Your trainer will give you the Hospitality Key Performance Guidelines for the OPIs.

As you work with 'Kannan', fill in relevant sections of the Baseline Profile Form. Make sure Kannan agrees!



**Activity M9-4b-6: Handout 6 - Kannan's Role Play Card**

You are Kannan Raveendranath, owner of The Singing Fish guest house in Batticaloa. You run it with your wife, Harathi, and your daughter, Nadanam. Nadanam is due to get married and move out in 6 months, which will be a loss to the business as well as the family, as she makes the breakfast. She also does the cleaning, and has a part time job which takes her away from 11am until 5pm. Harathi does all the shopping and manages the bookings and the accounts.

You like chatting to guests and giving advice, and everyone agrees you are very good at it. You are retired from your previous job at the post office, and have a pension.

The guesthouse has been running for 12 years now. It was slow to get started, but now, except during the monsoon season, you have probably an average of three or four rooms out of the nine used most nights. You aren't exactly sure. You haven't done refurbishment in that time, but you have repainted every now and again, and the place is bright. You've bought new bed linen and towels, too. The only change in that time, probably, is the introduction of wifi. There's a router in the sitting / eating area, and one at the top of the stairs for the rooms (but it doesn't really reach the far ones).

Most bookings come through Booking.com. You also get some tourists with backpacks brought from the station by the tuktuk drivers, but you have to give LKR 500 commission for this. Some guests stay one night only, some two or three nights. You have no idea what the average stay is.

Business is OK, but you have noticed that while there are more visitors to Batticaloa, the numbers in Singing Fish don't seem to have gone up. You are sure you could be doing better.

You don't have a website, and you don't have a Google business account, and so you aren't on Google Maps. You don't really see the point; how hard is it to find 123 Trincomalee Road? You don't have any flyers, business cards or any other printed material, either.

The rest is up to your imagination.....

Notes:







**Activity M9-6b-1: Handout 1 - Action and Skills Development Plan**

Areas of Focus for Action	What to do - SMART Objective	Date Set	Resources/Inputs Required	Date Completed
Product				
Marketing				
Operations/ Systems				
Human Resource Management				
Environmental Sustainability				
Business Activity				
Other KPIs				



Trainer Resources

# Module 10

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**Giving Feedback**

All resources are A4 size unless stated / Dotted line means to cut.

Activity M10-4c-1	Handout 1 - Script for a business presentation (one copy for the trainer who will act it out)
Activity M10-5c-A1	Handout 1 - Role-play card A1 - Role-play cards for a quarter of the participants who have been lettered / numbered 'A1'.
Activity M10-5c-A2	Handout 2 - Role-play card A2 - Role-play cards for a quarter of the participants who have been lettered / numbered 'A2'.
Activity M10-5c-B1	Handout 1 - Role-play card B1 - Role-play cards for a quarter of the participants who have been lettered / numbered 'B1'.
Activity M10-5c-B2	Handout 2 - Role-play card B2 - Role-play cards for a quarter of the participants who have been lettered / numbered 'B2'.

**Activity M10-4c-1: Handout 1 - Script for a business presentation**

A handout with a script for a bad business presentation, to be acted out by the trainer.

**CLIENT** (*Reading from a sheet of paper in a flat tone of voice, not making eye-contact with the audience, not pausing between sentences*): Um, I'm Roshan de Silva. Today, um, I will tell you about the two most important areas, um, that the marketing industry operates in. (*Plays nervously with hair.*)

So, um, the first topic that I want to speak about is direct marketing. (*Keeps playing nervously with hair.*) The direct marketer is, um, usually a position in a company like Samsung or Mikey... (*Pauses and looks horrified.*) I'm sorry, not Mikey, I meant to say Nike, of course... Anyway, it's a position like a product manager who will create, um, a concept, um, that, um, of the product that they want to sell. (*Stops for a moment and scratches nose.*)

Usually, however, they can't, um, the product manager won't, um, be able to create the concept all by himself... or herself... so often they have to outsource the work to an advertising agency. And then, um, then the advertising agency creates the actual concepts for the advertisement, you know, like, to be put on the TV or, um, in a commercial or, um, something like that. (*Keeps playing nervously with hair. Then seems to lose their place in the presentation and spends a few seconds looking at the paper in panic.*) For example, the companies... no, the advertising agencies, they are really big companies themselves and... and you find them in cities like, um, Colombo or Hyderabad or Bangalore or, um, somewhere like that... (*Finally turns over the paper and seems to find their place in the presentation again. Looks very relieved.*)

But let's move on from the advertising agencies and talk about, um, the media... (*Plays with hair again.*) And you have media-selling companies that normally sell, um, opportunities for different advertisements on different forms of media. So for instance, if, um, you want to put a commercial on television, then the media-selling company will show you, um, different numbers that represent how many viewers watch certain TV channels at certain times. (*Starts to sound hoarse.*) And with those numbers you would decide which time is best for your company to buy advertising time on which channel. (*Speeds up, still sounds hoarse.*) Or they might sell you opportunities on other types of media like, um, websites where you can run an online advertisement. Or they might, um, sell space in a magazine or a newspaper... (*Stops talking, grabs a glass of water and takes a long gulp of it.*)

That's everything. Thank you!



**Activity M10-5c-A1: Handout 1 - Role-play card A1****A1**

- ▶ You are a business coach, Mr. / Ms. Bandara
- ▶ Your client is a businessman called Charles Weeraratne.
- ▶ Two days ago, he sent out a business email to a potential customer. He accidentally cc-ed it to you, so you received the email too. You read it and now you want to give him feedback on it.
- ▶ Charles has low self-confidence. This is because he comes from a poor background. Sometimes he gets upset during feedback because he feels you are judging or criticising him.
- ▶ His school did not have a good standard of English teaching, and he gets embarrassed when you point out mistakes in his English.
- ▶ He is probably also embarrassed that he sent you the email by mistake!



**Activity M10-5c-A2: Handout 2 - Role-play card A2**

## A2

- ✦ You are Charles Weeraratne, a businessman who is working with a business coach, Mr. / Mrs. Bandara.
- ✦ Two days ago, you sent out a business email to a potential customer. You accidentally cc-ed it to your business coach, so they received the email too. Mr. / Mrs. Bandara read it and now wants to give you feedback on it.
- ✦ You have a fixed mindset. Sometimes you find it hard to work with Mr. / Mrs. Bandara because he / she always tells you to change things. You don't believe you need to change too much!
- ✦ You live in a rural area. A lot of the local businesspeople don't have good writing skills, especially in English. You often get emails from other local businesses, including MLS Associates, which are full of spelling and grammar mistakes. You know you make mistakes when you write emails yourself, but you believe the important thing is to get your message across.
- ✦ Sometimes you get annoyed at your coach. He / She comes from Colombo, looks down on rural businesses and is a bit of a snob!
- ✦ Your coach always tells you to do more to 'raise your business's profile'. That means sending out emails to prospective customers. So you were only doing what he / she told you to do. Now he / she is going to give you feedback about it and probably scold you. You can't win!



**Activity M10-5c-B1: Handout 1 - Role-play card B1****B1**

- ▶ You are a business coach, Mr. / Ms. Bandara
- ▶ Your client is a businessman called Charles Weeraratne.
- ▶ Two days ago, he sent out a business email to a potential customer. He accidentally cc-ed it to you, so you received the email too. You read it and now you want to give him feedback on it.
- ▶ Charles has a fixed mindset. He doesn't like to be told to change his way of thinking and doing things.
- ▶ You come from Colombo, where you feel there is a professional business culture.
- ▶ Charles lives and works in a rural part of Sri Lanka. He seems to be very relaxed, even complacent, about how he does business. You believe that if he wants to be successful, he needs to widen his business to other parts of Sri Lanka, including Colombo. That means he has to improve his standards.
- ▶ You told Charles to do more to 'raise his business's profile'. That means sending out emails to prospective customers. However, you didn't expect the emails to be full of spelling mistakes and inappropriate features! Now you worry that his emails will make him and his business look unprofessional.



**Activity M10-5c-B2 Handout 2 - Role-play card B2****B2**

- ✦ You are Charles Weeraratne, a businessman who is working with a business coach, Mr. / Mrs. Bandara.
- ✦ Two days ago, you sent out a business email to a potential customer. You accidentally cc-ed it to your business coach, so they received the email too. Mr. / Mrs. Bandara read it and now wants to give you feedback on it.
- ✦ You have low self-confidence. This is because you come from a poor background. Sometimes you get upset during feedback because you feel your coach is judging or criticising you.
- ✦ Your school did not have a good standard of English teaching, and you get embarrassed when people point out your mistakes in English.
- ✦ You are also embarrassed that you sent Mr. / Mrs. Bandara the email by mistake!
- ✦ Because of your poor background, you didn't learn to use a computer or have access to the Internet until later than most other people. For that reason, you still don't feel confident with modern social media and information technology.



Trainer Resources

# Module 11

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**Business Leadership Skills**

All resources are A4 size unless stated / Dotted line means to cut.

Activity M11-1a	Handout 1 - Find the Leaders (one copy per participant.)
Activity M11-1b-1	Handout 2 - Instructions for coach's (one copy per participant.)
Activity M11-1b-2	Handout 3 - Leaders and managers (one copy per participant.)
Activity M11-1b-3	Handout 4 - Leaders and managers – Post Task Feedback (one copy per participant.)
Activity M11-2-1	Handout 1 - Leaders and Decisions-making (one copy per participant.)
Activity M11-2-2	Handout 2 - Four Decision Making Methods (one copy per participant.)
Activity M11-3a-1	Handout 1 - Prioritise Leadership Attributes (one copy per participant.)
Activity M11-3a-2	Handout 2 - Leadership Attributes (one copy per participant.)
Activity M11-3b	Handout 3 - Coaching Leadership Qualities (one copy per participant.)
Activity M11-4a	Handout 1 - Match Up (one copy per participant.)
Activity M11-5-1	Handout 1 - Motivating Your Team (one copy per participant.)
Activity M11-5-2	Handout 2 - Motivators (one copy per participant.)
Activity M11-5-3	Handout 3 - What is Motivation? (one copy per participant.)
Activity M11-6a-1	Handout 1 - Resolute Leaders (one copy per participant.)
Activity M11-6b-1	Handout 2 - Resolute Leaders - Scorecard
Activity M11-6b-2	Handout 3 - Ten role cards - one copy of each

**Activity M11-1a: Handout 1 - Find the leaders**

## Task Instructions

Get together with six or seven other people to make a team.

Using the pieces of paper you are all now holding, and anything else you can find, the team should make a toy house.

At the end we will see which team has made the best little house!

**You have exactly 20 minutes for this task.**



**Activity M11-1b-1: Handout 2 -Instructions for coaches**

- ✦ Do not take part in the task. Do not say anything – just watch!
- ✦ Observe the leader and tick one of the boxes for each of the listed skills.
- ✦ Make notes if you wish. Add any other comments you think relevant.
- ✦ When the task is finished you will give feedback to the leader.

For any that need developing explain why - and what specifically can be improved.

For Tasks two onwards, also watch and report on how decisions were made – which methods were used to make them? **Autocratic? Consultative? Consensus? Democratic?**

	Good	Can be developed
1. Gives <b>direction</b> : what needs to be done and how.		
2. <b>Inspires – motivates - energises</b> the team.		
3. <b>Elicits equal participation</b> from all team members		
4. <b>Listens</b> to ideas.		
5. Makes sure the team achieves a quality result <b>on time</b>		
6. <b>Communicates</b> persuasively.		
7. Is <b>enthusiastic</b> .		
8.		
9.		
Which method was used for making decisions? (Only from Activity 3 onwards.)		



**Activity M11-1b-2: Handout 3 - Leaders and Managers**

Task aim: To help you explain to your clients what leadership is.

**Task Instructions:**

For this and the following six tasks one of you will be the **team leader** and one of you will be a **coach**. You will take it in turns to do this.

Your trainer will help you choose your first team leader and first coach.

**The leaders' job is to make sure the team comes up with top quality products (the answer to the tasks' questions) within the time limit.**

**The coach's job is to observe and later comment on the leader's leadership skills: you will find instructions for this on the last page of this module in your Participant Workbook.**

So now come up with a team answer to this question:

**What are the differences between leaders and managers? What do leaders do and what do managers do?**

**You have 15 minutes for this task.**

Leaders	Managers



● **Activity M11-1b-3:** Handout 4 - Leaders and Managers - Post Task Feedback

A leader	A manager
Creates a vision	Delivers the vision
Inspirational	Methodical
Sets the direction and goals	Follows direction and achieves goals
Strategic planner	Operational planner
Thinks 'ideas'	Thinks 'implementation'
Challenges the way things are	Improves the way things are
Takes risks	Manages risks
Seeks responsibility	Accepts responsibility
Invents new ways of doing things	Maintains systems, procedures and methods
Uses persuasion to get what is needed	Uses control
Coach	Direct
Asks what and why	Asks how and when
People follow leaders	People work for managers
Leads people	Manages tasks
Can leaders also be good managers?	Managers can be good leaders



**Activity M11-2-1: Handout 1 - Leaders and Decision Making**

Task aim: to enable you to help your clients make decisions.

**Task Instructions:**

Choose a new leader and a new coach.

**The leaders' job is to make sure the team comes up with a top-quality product - its answer to the following question - within the time limit.**

**What are four methods a leader with a team can use to make decisions?**

Consider **who** could be involved in making the decision and **how** they are involved.

Different decisions might need different methods.

For example, the way you decide whether to build a swimming pool or a new restaurant might be different from the way you decide what kind of welcoming drink to offer guests.

One method is given below: what could the other three be?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. The 'Democratic' method: you ask your team members to **vote**. The majority's opinion is the final decision.

**You have 15 minutes for this task.**



**Activity M11-2-2: Handout 2 - Four Decision-Making Methods****Authoritarian:**

One person (or a small group) makes the decision alone.

**When to use:**

- ✦ When decisions must be made quickly.
- ✦ When staff do not have the skills, knowledge, or experience to contribute to the decision.
- ✦ Routine decisions which do not make important changes.

**Main advantages:**

- ✦ Speed and consistency - because one person makes the decisions.

**Main disadvantage:**

- ✦ The quality of the decision depends on the quality and honesty of the decider.

**Consultative:**

One person makes the decision alone after listening to the opinions of others.

**When to use:**

- ✦ When the subordinates have skills or knowledge or experience that the decider(s) does not have.
- ✦ When the decision is complicated, will make important changes or will affect a lot of people.
- ✦ When the time to make the decision needs to be controlled.

**Main advantage:**

- ✦ Asking for and listening to advice from your staff can be motivating for them.

**Main disadvantage:**

- ✦ This method can be a 'trick': the leader only pretends to listen to keep people happy.

**Consensus:**

When everyone agrees on the same decision together.

**When to use:**

- ✦ When the decision directly affects many people.
- ✦ It is easier in small groups.

**Main advantage:**

- ✦ The decision will almost certainly be agreed, accepted and implemented.

**Main disadvantages:**

- ✦ It may be very difficult or impossible and very time-consuming to reach consensus.
- ✦ What is called 'consensus' is often not real consensus: people say they agree because (a) it's easier or (b) it's quicker or (c) some people dominate or (d) they are afraid to speak out etc.

**Activity M11-2-2: Handout 2 - Four Decision-Making Methods****Democratic:**

The decision is decided by vote.

**When to use:**

- ✦ When a lot of people have high skills, knowledge or experience.

**Main advantage:**

- ✦ Quality of decision can be high because people with different opinions contribute.

**Main disadvantage:**

- ✦ Can cause people to split into two groups (the majority and the minority) and this may lead to more conflict.

### Activity M11-3a-1: Handout 1 - Prioritise Leadership Attributes

**Task aim:** to help you identify which leadership attributes your clients need to develop.

**Task instructions:**

Choose a new leader and a new coach,

1. Look at the list of leadership attributes below.
2. Choose ten that you think are the most important for a Sri Lankan running a medium-sized hotel employing around 30 staff.
3. Then **prioritise** your list (ie: put them in order of importance). You only need to prioritise the top ten qualities.

**You have 20 minutes for this task.**

Well educated	Reliable (they do what they say they will do.)
Able to spot opportunities	Resolute (they stand up for their ideas, decisions, plans in the face of opposition.)
Able in administration	Enthusiastic
Able to speak lucidly and persuasively	Proactive (they act now to deal with opportunities, changes, difficulties that are coming.)
Able to write well	Hard-working
Able to make decisions	Analytical
Able to take risks	Able to understand people
Able to bring about change	Astute
Able to use initiative (takes the first step to get something done; doesn't wait for others to lead.)	Good with numbers
Ambitious	Tough
Able to control people	Able to deal with uncertainty
Self-aware (they know and understand themselves; and how other people see them.)	Able to learn from mistakes



**Activity M11-3a-2: Handout 2 - Leadership Attributes**

Leadership attributes most highly rated by 150 American chief executives.

1. Able to make decisions
2. Reliable (they do what they say they will do)
3. Resolute (they stand up for their ideas, plans, decisions in the face of opposition)
4. Proactive (they act now to deal with opportunities, changes, difficulties that are coming)
5. Self-aware (they know and understand themselves; and how other people see them)
6. Able to deal with uncertainty
7. Able to bring about change
8. Able to motivate others
9. Able to spot opportunities
10. Enthusiastic
11. Able to understand people
12. Uses initiative (takes the first step to get something done; doesn't wait for others to lead)
13. Able to speak persuasively.
14. Able to take risks
15. Able to learn from mistakes



**● Activity M11-3b: Handout 3 - Coaching Leadership Attributes**

Task aim: to help you identify which leadership attributes your clients need to develop.

**Task instructions:**

Choose a new leader and coach.

Looking at all the leadership attributes we have been discussing, choose **up to five** that you **predict** might be the ones your clients most need to develop - the ones where they may be weakest.

Write them here:

Be ready to say **why** you think these will need to be developed.

**You have 15 minutes for this task.**



**Activity M11-4a: Handout 1 - Match Up**

Task aim: to enable you to help your clients to adopt different leadership styles for different situations.

**Task instructions:**

Choose a new leader and coach.

Turn to Activity 4a - **Match Up** - in the Business Leadership Module in the Participant Workbook.

First match the texts in the boxes with the different leadership styles:

- ✦ Authentic Leadership style
- ✦ Autocratic Leadership
- ✦ Laissez-faire Leadership
- ✦ Situational Leadership
- ✦ Shared Leadership

Then choose a particular Leadership style for each of the eight listed businesses.

Finally, tell each other which leadership style suits each of you best – giving reasons.

**You have 20 minutes for this task.**



**● Activity M11-5-1: Handout 1 - Motivating Your Team**

Task aim: to enable you to increase your clients' ability to get their staff to work hard.

**Task instructions:**

Choose a new leader and coach.

On Handout 5 (ii) you will find a list of **motivators**.

For each one, decide whether it is Intrinsic, (people work hard because of the work itself,) or **Extrinsic**, (people work hard because of other things.)

Then decide, on a scale of 1 to 5, **how difficult** it might be for leaders to motivate their staff for **each particular motivator** (for example in terms of cost - the more expensive, the higher the score.)

Finally: **in general** - can you say which are easier for leaders to use to motivate their staff:  
(a) **Intrinsic** motivators or (b) **Extrinsic** motivators?

Leaders note - there are **19 Motivators**

**You have 20 minutes for this task.**



● **Activity M11-5-2: Handout 2 - Motivators**

Motivator	Intrinsic or Extrinsic?	Which of these needs are more difficult for the leader to satisfy? Five means very difficult.
	I or E	1 - 2 - 3 - 4 - 5
<b>Good interpersonal relations:</b> there is a friendly atmosphere in the workplace.		
<b>Self-fulfilment:</b> your staff feel that in their work they are doing things they really want to do.		
<b>Job-security:</b> your staff feel they can earn their living with your company for as long as they want.		
<b>Self-respect:</b> your staff take pride in their work however simple.		
<b>Work-life-balance:</b> you make sure your staff are not overworked and have the right amount of time with their families and private life.		
<b>Achievement:</b> your staff feel they are successful in their work.		
<b>Promotion:</b> you make sure that successful and hard-working staff get promoted so they can earn more money.		
<b>Clear and involving goals:</b> your staff care about the company's goals and how their work helps achieve them.		
<b>Good work conditions:</b> you make sure your staff feel the workplace is as comfortable and safe as possible.		
<b>Leadership:</b> you are a fair and effective leader.		

● **Activity M11-5-2: Handout 2 - Motivators**

<b>Leave / holidays:</b> you give your staff the number of days of paid leave (weekly and annually) they expect.		
<b>Praise:</b> you praise staff who work well		
<b>Recognition:</b> your staff know that if they work well it is noticed.		
<b>Fringe benefits:</b> you provide a variety of fringe benefits: e.g. transport or money for travel – food – bonuses – health insurance - education assistance – chances to travel – contributions to pension schemes – social activities etc		
<b>Job-satisfaction:</b> your staff feel that the specific job they do - whether simple or demanding – is worth doing.		
<b>Self-expression:</b> your staff feel able to openly express themselves, their thoughts and feelings through their work.		
<b>Participation:</b> your staff feel that their job enables them to contribute to decisions and suggest improvements.		
<b>Wages:</b> here refers to regular monthly pay – not one-off payments, or short contracts, or payments based on commission.		

### ● Activity M11-5-3: Handout 3 - What is Motivation?

Motivation is your staffs' willingness to work with energy.

Each member of staff has individual **needs**:

Wages

Self-fulfilment

Job-security

Achievement

Self-development

Promotion

Good work-conditions

Job-satisfaction

Fringe benefits

#### Types of Motivation:

##### Intrinsic & Extrinsic

##### Intrinsic motivation:

Energy comes if your staff feel satisfaction from their work.

##### Extrinsic motivation:

Energy comes if your staff are given things.

##### Satisfiers:

These things motivate people to work harder.

##### 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.**

Most satisfying factors are intrinsic – and most dissatisfying (including wages) extrinsic.



**● Activity M11-6a-1: Handout 1 - Resolute Leaders**

Task aim: to enable you to help your clients stand up against opposition to their plans and proposals

**Task instructions:**

Choose a new leader and coach.

Read this case study and then answer the question after it.

Tangalle used to be a quiet resort with a few picturesque hotels and guest houses – but in the last few years, huge five-star hotels have been built along the entire coast in that area. As a result, the smaller hotels have been dwarfed and lost over 50% of their revenues.

The manager of a small hotel called Paradise Cabins has discovered from talking to guests and doing some research through questionnaires that there is an opportunity to differentiate the hotel from the others.

The proposal is that the hotel should offer night-time boat trips in the local traditional fishing boats, especially when the sea is calm and the sky full of stars or a full moon. Two colourful boats should be moored near the beach in front so that tourists from the surrounding hotels can see what is on offer and become customers for the boat trips as well.

The manager has put the proposal to the hotel owners who are based in Colombo and seldom bother to come down to Tangalle anymore, but it was met with flat rejection. No reason given – just No.

What should the manager – who is a Resolute Leader – do?

**You have 15 minutes for this task**



**Activity M11-6b-1: Handout 2 - Resolute Leaders - Scorecard****Role-play: Scorecard for managers (one card each)**

1. Owner	Yes	Not sure	No
2. Owner	Yes	Not sure	No
3. Owner	Yes	Not sure	No
4. Owner	Yes	Not sure	No
5. Owner	Yes	Not sure	No
6. Owner	Yes	Not sure	No
7. Owner	Yes	Not sure	No
8. Owner	Yes	Not sure	No
9. Owner	Yes	Not sure	No
10. Owner	Yes	Not sure	No



**Activity M11-6b-2: Handout 3 - Ten Role Cards****The Resolute Leader**

You are one of the managers of the Paradise Cabins hotel in Tangalle.

You have made the proposal to the ten owners of the hotel, (five brothers and five sisters) that we should offer night-time fishing trips in the colourful traditional fishing boats when the sea is calm, and it is not raining.

They have rejected the idea without even listening to the reasons why you think this such a good idea.

You know tourists are interested because they have told you when you asked them and you have even given questionnaires to tourists on the beach asking about this. The questionnaire included asking how much tourists would be prepared to pay for two-hour trips.

You know the fishing men owners of two boats and you have persuaded them to charge you very low fees for the first two months to see if the idea will work. What they want is a bottle of old arak after every trip.

**Brother Owner One**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think the **costs are too high** and you don't believe the income from this idea will even cover those costs. And tourists won't want to spend the whole night sitting on a boat – they'll soon find it very **boring** and want them to go back to the hotel.



**Activity M11-6b-2: Handout 3 - Ten Role Cards****Brother Owner Two**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think it is **crazy**. No one has ever offered night-time boat trips in local fishing boats. Never. Tourists want **modern boats, not old-fashioned** wooden ones. And the fishing men who drive the boats **can't even speak English**.

**Brother Owner Three**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think it is **too dangerous**. When the sea suddenly becomes rough and the waves get very high, the tourists might fall off the boats, or get sick, and then they'll blame the hotel and want their money back. And you will spend every night **worrying** that someone will get **drowned**.



**Activity M11-6b-2: Handout 3 - Ten Role Cards****Brother Owner Four**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think **no one will be interested**. Tourists only like to eat, party and get **drunk** at night – and certainly, they don't want to get **wet** when it rains – and it will be too hot when it is not raining – these boats don't even have **A/C**.

**Brother Owner Five**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think other fishermen will get **jealous** of the owner of the boats and start making problems for the hotel – you know what these southerners are like. Besides, there are no proper **toilets** on these boats – just holes at the back.



**Activity M11-6b-2: Handout 3 - Ten Role Cards****Sister Owner One**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you **don't trust the manager**. You think he has a secret reason for this plan – maybe he is a relation of the fishing boat owners – or he will get money from them in some way. You know he has a lot of **relatives who are farmers** – you think there is some suspicious connection between these farmers and the fishermen.

**Sister Owner Two**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you **don't like anything new** – new ideas, new technology, new ways of doing things. You think a hotel is a hotel – it should just concentrate on keeping the rooms clean and providing decent food. Also, you think the manager is a very **lazy** person.



**Activity M11-6b-2: Handout 3 - Ten Role Cards****Sister Owner Three**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because you think the **tourists will misbehave** if they get the chance to go on boats. Traditional fishing boats are for traditional fisherman, not for tourists who think they are some sort of game. They will start jumping into the sea, **running up and down** and making life very difficult for the traditional fishermen.

**Sister Owner Four**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea because the manager has no **right to make proposals** all over the place. The manager's job is to manage and keep quiet. It makes you very angry to see her going around making **all these proposals**. You have a proposal for her – either get on with your work and behave yourself or go and look for another job somewhere else.



**Activity M11-6b-2: Handout 3 - Ten Role Cards****Sister Owner Five**

You are one of the owners of the Paradise Cabins hotel in Tangalle.

You are not really interested any more in this hotel because it has been losing money over the last few years.

You have heard that the manager has made a proposal to offer night-time boat trips in local traditional fishing boats.

You are against the idea **because you are against it. You are against most things.** You are against the hotel, the manager, the tourists, the government, the shopping malls, cricket, the queen of England. You have heard the queen of England wants to go on a traditional fishing boat trip. You are against that.



Trainer Resources

# Module 12

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Growth Mindset

All resources are A4 size unless stated / Dotted line means to cut.

Activity M12-2c-1	Handout 1 - The second half of a case study (one copy per participant)
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**Activity M12-2c-1: Handout 1 - A handout with the second half of a case study**

## Case Study



Shamila, who has a **growth mindset**, decides to give Instagram marketing a go. She has never used the platform before and feels nervous, but thinks it is worth a try. She doesn't mind trying new things if it may help her salon. She researches online how to set up an account, and spends some time finding the hashtags that are popular with potential clients. She posts her first pictures and waits to see what happens! After all, failure is just an opportunity for growth.

Kumudu, who has a **fixed mindset**, has never used Instagram either but she prefers to stick to what she knows. She feels embarrassed at the idea of getting it wrong and thinks, 'imagine if I set up an account and get no business, I would feel like such a failure, my friends would laugh at me'. As a result, she doesn't create an account and continues to hope business will get better on its own.



Trainer Resources

# Module 13

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**Advancing as a Business Coach**

All resources are A4 size unless stated / Dotted line means to cut.

Activity M13-3a-1	Handout 1 - Non engaged clients - Role play One - Maria's Role Card (five copies)
Activity M13-3a-2	Handout 2 - Non engaged clients - Role play One - Maria's Coach Card (five copies)
Activity M13-3a-3	Handout 3 - Non engaged clients - Role play One - Malaka's Role Card (five copies)
Activity M13-3a-4	Handout 4 - Non engaged clients - Role play One - Malaka's Coach's Role Card (five copies)
Activity M13-3b-1	Handout 5 - Client with Limiting Beliefs - Role-play Two - Asela's Role Card (ten copies)
Activity M13-3b-2	Handout 6 - Client with Limiting Beliefs - Role-play Two - Asela's Coach's Role Card (ten copies)
Activity M13-4b-1	Handout 1 - Evaluating Your Training - Client Feedback (one copy for per participant)
Activity M13-4c-2	Handout 2 - Three Things (one copy per participant)

## ● Activity M13-3a-1

## Handout 1 - Non engaged clients - Role-play One - Maria's Role Card

**Role-play 1: Maria's Role Card**

You are Maria, the housewife who lives in Matale. You want to run a business giving cooking lessons in local food to foreign tourists.

Your coach has visited you a few times, and you are now at stage six of the Coaching Journey: '**Decide the goals**'. These visits have been very useful.

Your coach has asked you to prepare for this visit by deciding what you want to have achieved by the end of three months.

Your idea is that by then you will have built a large kitchen which follows the health and safety requirements of the Sri Lankan Tourist Board, and is certified by the Board.

But unfortunately your husband does not agree with this coaching. The coach never speaks to him and your husband thinks he is a rich person from Colombo who doesn't understand life in Matale and should not be interfering in your family's affairs.

So now when you meet the coach you act as if you are not interested any more in the coaching. You think it better to tell him you haven't thought about any goals.

Only tell the coach the real reason if he / she persuades you and you trust her / him.



**Activity M13-3a-2: Handout 2 - Non engaged clients - Role play One - Maria's Coach Card****Role-play 1: Maria's Coach's Role Card**

You are a coach from Colombo and your client is Maria, the housewife who lives in Matale and wants to run a business giving cooking lessons in local food to foreign tourists.

You have visited Maria a few times, and you are now at stage six of the Coaching Journey: **'Decide the goals'**.

You have asked her to prepare for this visit by deciding what she wants to have achieved by the end of three months.

You have not talked to Maria's husband – he keeps avoiding you and going out when you visit. But you think he does not like you – though you don't know why.

Start the meeting by asking what she wants to have achieved by the end of three months.

Then carry out the three-step process:

1. Why?
2. Challenge sensitivity
3. Agree the way forward



**Activity M13-3a-3: Handout 3 - Non engaged clients - Role play One - Malaka's Role Card****Role-play 1: Malaka's Role Card**

You are Malaka, the 21 year old who lives in Talalla.

You are skilled at kitesurfing and want to set up your own kitesurfing school for foreigners in Talalla. You have saved quite a lot of money and you have seen other local people getting money from the bank and building small restaurants.

Your coach is an elderly person who you respect, though she / he is old fashioned' she / he has visited you a few times, and you are now at stage six of the Coaching Journey: **'Decide the goals'**.

Your coach has asked you to prepare for this visit by deciding exactly what you want to have achieved by the end of three months.

But you haven't decided anything because your friends keep dragging you away to join them on trips where you enjoy partying. So you only have a vague idea about making some sort of building perhaps.



● **Activity M13-3a-4:** **Handout 4 - Non engaged clients - Role play One - Malaka's Coach's Role Card**

**Role-play 1: Malaka's Coach's Role Card**

You are a coach from Colombo and your client is Malaka, the 21 old who is skilled at kitesurfing and wants to set up his own kitesurfing school for foreigners in Talalla.

You have visited Malaka a few times, and you are now at stage six of the Coaching Journey: **'Decide the goals'**.

You have asked him to prepare for this visit by deciding exactly what he wants to have achieved by the end of three months.

You have heard that his friends are a wild bunch; they are jealous and keep mocking him and making him join them for partying. You think that is why he doesn't take the coaching seriously.

Start the meeting by asking what he wants to have achieved by the end of three months.

Then carry out the three-step process:

1. Why?
2. Challenge sensitivity
3. Agree the way forward



**Activity M13-3b-1:****Handout 5 - Client with Limiting Beliefs - Role-play Two - Asela's Role Card****Role-play 2: Asela's Role Card**

You are Asela who has set up your business, offering trekking and walking trips around Bandarawella that allow customers to see nature .

Your coach has visited you a few times, and you are now at stage six of the Coaching Journey: **'Decide the goals'**.

Your coach has asked you to prepare for this visit by deciding exactly what you want to have achieved by the end of three months.

Your idea is that by then you will know how to do **marketing** so you can catch lots of tourists who stay in Ella and Nuwara Elia.

But you do not really believe you can do this because you've heard that 'marketing' is something only clever Colombo 7 type people do and your schooling was very basic, no 'O' or 'A' levels, no college or university education, not like Saint Thomas'. You like to read and study but your family cannot afford to send you to college.

Although you can speak with tourists, no problem, it is not like those Colombo 7 people with their elocution classes and all.

In short you know nothing about marketing and don't know how you can learn it.



● **Activity M13-3b-2:** Handout 6 - Client with Limiting Beliefs - Role-play Two - Asela's Coach's Role Card

**Role-play 2: Asela's Coach's Role Card**

You are a coach from Colombo 7, but your extended family comes from Badulla where your sister, who is a very kind and helpful lady, runs a big clothing business and exports abroad.

Your client is Asela who has just started setting up a business, offering trekking and walking trips for tourists around Bandarawella.

You have visited Asela a few times, and you are now at stage six of the Coaching Journey: **'Decide the goals'**.

You have asked Asela to prepare for this visit by deciding exactly what she wants to have achieved by the end of three months, so start the meeting by asking her about that.

Then carry out the three-step process:

1. Why?
2. Challenge sensitivity
3. Agree the way forward



**Activity M13-4b-1:** Handout 1 - Evaluating Your Training - Client Feedback

Evaluating your training

**Question 1**

Rating scale 1

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**Question 2**

Rating scale 2

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**Question 3**

Rating scale 3

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**Question 4**

Rating scale 4

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● **Activity M13-4c-2:** Handout 2 - Three Things

Three things you do well:

Three things you could do differently:



Trainer Resources

# Module 14

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Developing Your Coaching Practice

Activity M12 – 5b

Participants need to use their phones or tablets to make two minute videos.

Trainer Resources

# Module 15

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End of Course Simulation

All resources are A4 size unless stated.

Activity M15-T-1	Handout 1 - Additional Trainer Instructions for Odd-Numbered Groups in Activity 2 & 3 (for trainer)
Activity M15-2a-1	Handout 1 – the Hidden Garden Hotel (copies for half the participants)
Activity M15-2a-2	Handout 2 – the Emerald Forest Hotel (copies for half the participants)
Activity M15-2a-3	Handout 3 - list of 12 core competencies (four copies per trainer monitoring each group, e.g. one copy to be marked for each participant in the group)
Activity M15-2b-1	Handout 1 – initial evaluation / analysis form (one A3 copy per group)
Activity M15-2c-1	Handout 1 – action plan form (one A3 copy per group)
Activity M15-3a-1	Handout 1 – role-play descriptions for one-eighth of the participants who are group member A in group 1.
Activity M15-3a-2	Handout 2 – role-play descriptions for one-eighth of the participants who are group member B in group 1.
Activity M15-3a-3	Handout 3 – role-play descriptions for one-eighth of the participants who are group member C in group 1.
Activity M15-3a-4	Handout 4 – role-play descriptions for one-eighth of the participants who are group member D in group 1
Activity M15-3a-5	Handout 5 – role-play descriptions for one-eighth of the participants who are group member A in group 2.
Activity M15-3a-6	Handout 6 – role-play descriptions for one-eighth of the participants who are group member B in group 2.
Activity M15-3a-7	Handout 7 – role-play descriptions for one-eighth of the participants who are group member C in group 2.
Activity M15-3a-8	Handout 8 – role-play descriptions for one-eighth of the participants who are group member D in group 2.
Activity M15-3b-1	Handout 1 – role-play observation forms (two copies per participant)
Activity M15-4-1	Handout 1 – end-of-course test (one copy per participant)
Activity M15-6-1	Handout 1 – course feedback questionnaire (one copy per participant)

**Activity M15-T-1:** **Handout 1 - Additional Trainer Instructions for Odd-Numbered Groups in Activity 2 & 3**

## Activity 2: Group presentations

In the event of there being an odd number of participants, so that you end up with one or more groups of three or five, continue with these tasks as planned. The groups should be able to perform Activities 2a-f equally well whether they have three, four or five members. For Activity 2g, double up participants where necessary, so that there are two group-members giving feedback to or receiving feedback from one member of another group.

## Activity 3: Roleplays

In the event of there being an odd number of participants, so that you end up with one or more groups of three or five, make the following amendments to the activities.

With a group of three, for Activities 3a-b, get group-member A to study the coach's role-description on **Handouts M15-3a-1** or **5**, but also to study the client's role-description on **Handouts M15-3a-4** or **8**. Therefore, the handouts are assigned like

Group 1 – received Case Study 1 on <b>Handout M15-2a-1</b> in Activity 2a	
Group-member A	<b>Handout M15-3a-1 – read the coach role-description only</b> <b>Handout M15-3a-4 – read the client role-description only</b>
Group-member B	<b>Handout M15-3a-2</b>
Group-member C	<b>Handout M15-3a-3</b>

Group 2 – received Case Study 2 on Handout M15-2a-2 in Activity 2a	
Group-member A	<b>Handout M15-3a-5 – read the coach role-description only</b> <b>Handout M15-3a-8 – read the client role-description only</b>
Group-member B	<b>Handout M15-3a-6</b>
Group-member C	<b>Handout M15-3a-7</b>

● **Activity M15-T-1:**

**Handout 1 - Additional Trainer Instructions for Odd-Numbered Groups in Activity 2 & 3**

Then set up three role-plays. Every group member still gets to be the coach once and gets to be the client once.

1. Group-member A (with **Handouts M15-3a-1 or 5**) speaks with Group-member B (with **Handouts M15-3a-2 or 6**). Group-member C observes and gives feedback in Activity 3c.
2. Group-member C (with **Handouts M15-3a-3 or 7**) speaks with Group-member A (with **Handouts M15-3a-4 or 8**). Group-member B observes and gives feedback in Activity 3c.
3. Group-member B (with **Handouts M15-3a-2 or 6**) speaks with Group-member C (with **Handouts M15-3a-3 or 7**). Group-member A observes and gives feedback in Activity 3c.

When there is a group of five, give the additional participant an extra copy of one of the four handouts. Encourage that participant to spend a few minutes preparing for their role as the **client** by liaising with the **other** group-member who has the **same** client's role-description. Tell them to imagine that one is the manager and the other is the manager's deputy. During the role-play, they will **both** speak to the coach and make similar arguments.

For the role-play where the additional participant is the **coach**, however, stage a **fifth** role-play. Here, the **trainer** assigned to the group should take on the role of the **client**.

They should make sure they are familiar with the relevant client's role-description. There will have been one role-play using the same role-descriptions, but as the client the trainer should go off on a different tangent, creating a **different** situation and forcing the coach / additional participant to react in a different way. The other four group-members can all observe and offer feedback in Activity 3c.

Be careful about timing. This will involve squeezing an extra role-play and feedback session into the time allocated for Activities 3b-c.

**Activity M15-2a-1: Handout 1 - Case Study 1 - Hidden Garden Hotel**

**A. Information From The Basic Information Form**

1. Full name of the client	Rajan Sivaram					
2. Designation	Owner	<input checked="" type="checkbox"/>	Manager	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>

7. Name of the business:	The Hidden Garden Hotel
8. Address:	17 Silver Beach Road, Arugam Bay

14. How many people are currently employed? (enter numbers)

Family members			Full time staff				Part time staff				
Male	<input type="checkbox"/>	Female	1	Male	2	Female	<input type="checkbox"/>	Male	1	Female	<input type="checkbox"/>

16. Does the business employ any people with disability?

Yes	<input checked="" type="checkbox"/>	No	<input type="checkbox"/>
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If yes, provide details below

The family member employed (the owner's sister) has had a mobility challenge throughout her life and she uses a wheelchair.

18. Have the employees participated in any skills development training in the last four years?

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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19. Has the client him / herself participated in any skill development training in the last four years?

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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**Activity M15-2a-1: Handout 1 - Case Study 1 - Hidden Garden Hotel****B. Profile Of The Owner And Enterprise**

The Hidden Garden Hotel is a building and garden that Rajan Sivaram inherited from his father in Arugam Bay. It had been a residential mansion. Rajan saw potential in turning it into a hotel, made several rooms in the mansion into guestrooms and built five small chalets along one side of the garden. Much of the garden remains. The premises are surrounded by a high wall – hence the name, ‘Hidden Garden’. The wall blocks any view, but the beach and sea are only one minute’s walk away.

Rajan employs three people full-time and a fourth, a teenager who acts as an ‘odd-job man’, part-time. One of the full-time employees is his sister, who looks after the hotel’s finances and much of its day-to-day running. His sister is in a wheelchair and has recommended that he improve access to and around the hotel. Their father made the ground floor of the building ‘wheelchair friendly’ so that she could live there comfortably, but the street outside, the front steps, the mansion’s upper floor and the garden paths are difficult for people with mobility issues. The other full-time employees are two older men who used to work for Rajan’s father. He employs them because he feels responsible for them. They clean the rooms and do the gardening. Rajan takes care of the kitchen and meals because he enjoys cooking and once ran a restaurant. Neither he nor his sister knows much about marketing.

Perhaps because it is ‘hidden’, the hotel didn’t get many Sri Lankan guests at first. Early in its existence, a foreign travel writer stayed there, enjoyed it and gave it a good write-up on his blog. As a result, the hotel got a lot of foreign guests, particularly ones wanting to go surfing. However, the COVID-19 pandemic has stopped them from coming. Rajan now depends on local holidaymakers for business and often cuts prices to encourage them to stay. He admits that he doesn’t like having Sri Lankan guests, especially wealthy Colombo ones because he thinks they are ‘too finicky’.

Rajan’s sister and employees will tell you that he makes decisions by himself and doesn’t consult other people, but he doesn’t see it that way. He feels everyone sees him as being weak and keeps giving him advice on what to do – too much advice. His sister irritates him because she keeps complaining about the hotel’s accessibility problems. Perhaps he is sensitive because his restaurant eventually went bankrupt. Also, his father, a rich man, was disappointed in him becoming a restaurateur and couldn’t understand his love for cooking, which he thought was ‘unmanly’.

Rajan is worried now because, with the change from foreign to local guests, the hotel has been getting negative reviews on Tripadvisor. He reacted angrily to these and posted some hostile replies. This caused an argument with his sister, who said he was making the situation worse. He says publicly that changes are needed, and he is proud that he decided to build the chalets. However, privately, he admits that change frightens him because he might make the wrong decisions and things might get worse. This fear may come from the failure of his restaurant. When people ask him what goals he has for the hotel, Rajan says that he wants to improve cleanliness and hygiene, a common complaint on Tripadvisor; develop the garden; improve his staff’s English; and at his sister’s insistence, improve accessibility. But more fundamentally, he would like to find some pattern in the bookings and residencies he gets so that he knows which seasons and types of guest to concentrate on. At the moment, business seems incredibly random. He can’t make sense of it at all.

**Activity M15-2a-1: Handout 1 - Case Study 1 - Hidden Garden Hotel****C. Rating On Booking.com**

The rating on Booking.com is 7.3. The ratings for separate areas making this up are:

Staff	8.1
Value for money	7.3
Wifi	4.8
Cleanliness	6.6
Comfort	7.5
Location	9.2
Facilities	7.5

**D. Reviews On Tripadvisor**

- ◆ The staff were helpful and the garden was lovely, though like a jungle in places. Also a great breakfast. Other meals when we asked for them were good too. However, their staff didn't know how to clean a room properly. Parts of our chalet were dusty. Also, the wi-fi was poor at times. A perfect location, almost on the beach, although there were a lot of mosquitoes in the evening.
- ◆ During the pandemic I've been working from home in Colombo. My wife persuaded me to take the family on a holiday to Arugam Bay, saying I could spend some time working on my laptop in the hotel and the rest of the time on the beach. It was a big mistake to stay at this hotel because the internet connection was terrible! I got little work done, which ruined my holiday.
- ◆ An okay hotel, but frustrating. A wonderful location by the beach and a nice (if overgrown) garden. Staff tried to be helpful, but sometimes didn't seem to understand – especially when we asked them to re-clean our chalet, which was a bit dirty when we arrived. Maybe they didn't follow our English. A good breakfast, but the owner kept bringing more food than we could eat. Wi-fi wasn't good and we got a lot of bug-bites in the evening.
- ◆ My heart sank when we arrived and saw two old men cleaning in the lobby. I knew this was going to be a typical, dusty Sri Lankan hotel! The mansion and garden look old-fashioned and have character, but I don't want hygiene standards from a hundred years ago too! Still, though our chalet was dirty, my brother's family stayed in a room on the mansion's ground floor, which they said was quite clean. So maybe you should insist on a room there...

**Activity M15-2a-1: Handout 1 - Case Study 1 - Hidden Garden Hotel****E. Information Based On Indicators From The Hospitality Key Performance Guidelines****Site and building:**

- 1. Site and construction appearance** – mansion constructed in a colonial-era style from local materials; chalets; large garden; overlooks the beach although enclosed by a high wall, which prevents a view; beach a minute's walk away.
- 2. Quality standards – bedrooms** – old mansion bedrooms meet minimum standards; modern chalet rooms exceed minimum standards in some points, with some nice decorations. However, mansion bedrooms are kept cleaner than the chalet bedrooms.
- 3. Quality standards – bathrooms** – old mansion bathrooms meet minimum standards; modern chalet bathrooms are spacious and comfortable. However, again, mansion bathrooms are kept cleaner than the chalet bathrooms.
- 4. Quality standards – reception and dining facilities** – reception and dining room look attractive, but parts of reception are dusty. The small dining room opens onto the garden.
- 5. Level of maintenance** – mansion has 'character' but looks old and has peeling paint. Garden is overgrown in places and has a stagnant pond hidden in the bushes at the back.
- 6. Accessibility for people with disabilities** – ground floor of mansion is accessible with wide doorways, rails in bathrooms, etc. Upper floor is less accessible. The outside road, front steps and garden paths are not wheelchair friendly.

**Marketing**

- 7. Business plan** – The owner has ideas about what to do, but nothing in writing.
- 8. Marketing material** – One out-of-date brochure (before the chalets were built) and business cards with the owner's name on them (but not the hotel's).
- 9. Advertising and web performance** – present in a few websites (e.g. TripAdvisor and Facebook) but not proactive.
- 10. Distribution channels** – Two to five channels.
- 11. Tariff management** – some tariffs for domestic and international guests, plus a few promotions.

**Activity M15-2a-1: Handout 1 - Case Study 1 - Hidden Garden Hotel****Operations**

- 12. Human resource management** – basic payroll and staff planning, but no training.
- 13. Staff performance** – some reasonable customer service, but hygiene standards are not good in the chalets and upper-floor mansion bedrooms and the staff's English is variable.
- 14. Customer service level** – A few additional services: internet access (but not good), English communication (but variable), laundry service, welcoming drink.
- 15. Booking system** – in a notepad.
- 16. Accounting system** – some book-keeping done, but not always accurate.
- 17. Waste management** – some recycling and composting done; nothing on water or energy.

**Food and services**

- 18. Kitchen facilities and hygiene** – basic Sri Lankan kitchen with basic equipment; some level of hygiene but room for improvement.
- 19. Food quality and authenticity** – breakfast provided but can provide lunch and dinner too if requested. Some meal choices, desserts and drinks. Standard, but quite good quality.



**Activity M15-2a-2: Handout 2 - Case Study 2 - Emerald Forest Hotel and Spa**

**A. Information From The Basic Information Form**

1. Full name of the client	Indika Jayawickrama
2. Designation (please specify)	Hotel and Spa Manager

7. Name of the business:	Emerald Forest Hotel and Spa
8. Address:	Batandura, Deniyaya

14. How many people are currently employed? (enter numbers)

Family members				Full time staff				Part time staff			
Male	0	Female	0	Male	10	Female	5	Male	3	Female	6

16. Does the business employ any people with disability?

Yes	X	No	
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If yes, provide details below

The handyman / maintenance man (who also helps the gardener) Hasan has cerebral palsy. This clearly affects his right leg and arm, and he walks with a pronounced limp. His speech can be hard to understand if you are not habituated to it. He is left-handed, and technically very competent.

17. Do employees come from a variety of communities? (Sinhalese, Tamil, Muslim, Burgher, other)

The majority are Sinhalese. Hasan the handyman and two other members of staff are Moslem. There are also two Tamil women in housekeeping. Their parents work on the tea estates.

18. Have the employees participated in any skills development training in the last four years?

Yes	X	No	
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### ● Activity M15-2a-2: Handout 2 - Case Study 2 - Emerald Forest Hotel and Spa

If yes, list the type of training

Type of training	Institution providing training	Number of employees	Year of training
1. Diversity Training	Centre for reconciliation, Colombo	All on-site	Last year

## B. Profile Of The Owner And Enterprise

Emerald Forest Hotel and Spa is an upmarket hotel outside Deniyaya. It advertises itself as a destination in itself, with six extremely comfortable treehouse rooms in the lower tree canopy, and six more, even more, luxurious tented rooms on the ground. The hotel is set in its own land, extending to four acres, and has a spa, for the guests' use only. There are three types of monkey (the little brown ones can be a real problem when they get in the rooms), giant squirrels and countless birds in the trees, and wild boar, mouse deer, mongooses, porcupines and more on the ground. There is no outside noise to disturb the guests. Nearby attractions include Singharajah rain forest, a number of tea estates, some picturesque old temples, and a wide choice of birdwatching walk with great views.

The property is owned by a company set up by an American, Susan, who used to work for the UN in Colombo. Susan is now working in Somalia, and goes to New York a lot. The previous manager left rather suddenly after six years in post (he was there from the beginning) and there is talk about missing money. Indika was recruited by Susan from a job in a large hotel, managing the finance department, and she has already made several changes to the accounting systems (which were not robust – she has, for example, introduced daily cash reconciliations). Susan speaks to Indika weekly, and focuses on the accounts. She doesn't really have time to focus on anything else.

This, Indika thinks, is a pity because, although extremely experienced with accounts, she has less experience in many other areas, and would appreciate more support. This is why she asked for a coach, an idea Susan approved immediately. Indika has experience managing staff, as she did in the finance department of the large Colombo hotel, but here she is experiencing problems that are new to her. Firstly, there are ethnic tensions. There are Muslim, Tamil and Sinhalese staff, the latter being the largest group. Indika is not quite sure if the non-Sinhalese are standing apart, or if the Sinhalese are being aloof. There is no common purpose, anyway. Also, you have heard some of the staff, and not only Sinhalese, make cruel comments about Hasan. He manages fine, considering his cerebral palsy, even if he does need help carrying things. Technically, he is very strong and everything works! Apparently, an Australian woman came last year to give diversity training, but it seems to have had no impact. The staff reacted negatively to the woman's appearance, especially her hair, which had been dyed a strange colour. Being from Colombo, Indika felt their reaction was unfair and unreasonable.

## Activity M15-2a-2: Handout 2 - Case Study 2 - Emerald Forest Hotel and Spa

There is also a personnel problem with Gayan, the manager of the spa. 'Manager' seems too much of a title, as basically, the spa is run by Gayan and one part-time woman. The spa is not well looked after, the treatments can be perfunctory, and Gayan is very resistant to feedback, especially, Indika feels, when the feedback comes from a woman. Indika is clearly worried about this problem but says she feels she has not been in position long enough to tackle it properly. You feel that Indika is slightly lacking in confidence in staff management.

The hotel has a well-developed website, and Facebook, Instagram, TripAdvisor and Google Business accounts. The profile is strong. It is promoted both as a quiet relaxing place, a getaway from Colombo, Galle or Matara, but also as a place for activity and adventure. Susan likes the idea of different people mixing, and when she is in Sri Lanka Indika has seen her 'holding court' in the communal dining area.

But Indika feels she has sensed friction between the guests at times and she thinks that some more space for people to spread out would help.

### C. Rating On Booking.com

The rating on Booking.com is 7.7. The ratings for separate areas making this up are:

◆ Staff	6.8
◆ Value for money	7.8
◆ Wifi	7.6
◆ Cleanliness	8.2
◆ Comfort	7.9
◆ Location	9.1
◆ Facilities	6.5

### D. Reviews On Tripadvisor

- ◆ This was just great! It's actually our third trip, and we feel so relaxed here, away from Colombo. We enjoy chilling (we aren't into the spa, but we do use the pool a bit) and then just doing one excursion each time we come. This time, we went on a beautiful guided walk. I thought there was a problem with the bill at the end but the manager explained it very easily and clearly. Turned out I'd made the mistake. Indika, the manager, handled the situation really well. Can't wait to get back!

## ● Activity M15-2a-2: Handout 2 - Case Study 2 - Emerald Forest Hotel and Spa

- Overall, very good. The rooms are comfortable, check in and check out went like a dream, and our excursion to Singharaja was superb! We did have a problem with monkeys in our treetop room, though, and I think it must have been them who broke my phone screen. Why not monkey-proof the rooms, while leaving them open for the breeze? Also, my wife said her massage was a bit short and not great, and, strangest of all, I saw two waiters fighting, actually punching each other, with a handicapped man trying to get between them. Odd! Also, we'd have liked a more private place for dinner, especially on our anniversary.
- We really enjoyed this. The only exceptions were the rather loud group of kids who were on some sort of adventure thing. At mealtimes we wished we could have got far away from them! Also, we didn't think much of the spa treatments. Or the spa, frankly. But the rooms were great, the animal and bird life interesting, and the food filling!
- Pretty bloody good! We picked up on a bit of tension among the staff. Don't know what that was about. But the handyman came and fixed things in our room really well. My husband reckons he's good at DIY, but he was still impressed by this guy! I felt a little uncomfortable in the spa with a man, so said I'd come back later, and didn't. He gave me a stare when he saw me the next day!

### E. Information Based On Indicators From The Hospitality Key Performance Guidelines

#### Site and building

- 1. Site and construction appearance** – Main reception / bar / common sitting / restaurant building made from local wood, with batik hangings and covers. Treetop rooms made from the same materials. Tented rooms have the same interior, and are covered in dark green canvas.
- 2. Quality standards – bedrooms** – High standard of building and cleanliness for treetop and ground rooms. Mosquito nets, fans, kettle with tea/coffee. Treetop rooms open to the breeze, with gaps between top of walls and roof.
- 3. Quality standards – bathrooms** – High standard of fittings and cleanliness, both in-ground rooms and even in treetops, though these bathrooms are smaller.
- 4. Quality standards – reception and dining facilities** – Reception and dining room look handsome, and are roomy and well aired, with ceiling fans and broad steps down to the garden and paths to the rooms. Communal sitting area beside the communal dining room.
- 5. Level of maintenance** – Good, considering this is almost in the jungle. Lights need replacing frequently.
- 6. Accessibility for people with disabilities** – There is a wheelchair / suitcase ramp at both ends of the communal building. The paths to the rooms can be a little 'sticky' for a wheelchair, especially after rain. Treetop houses are, clearly, not wheelchair accessible.

**Activity M15-2a-2: Handout 2 - Case Study 2 - Emerald Forest Hotel and Spa****Marketing**

7. **Business plan** – There is no marketing plan, at least, no written document.
8. **Marketing material** – There is a well-developed website, a brochure and business cards. Everything looks and feels professional.
9. **Advertising and web performance** – No advertising, as Susan is a great believer in organic marketing and word of mouth. There are active Facebook and Instagram pages, a Google business page, a TripAdvisor account, and bookings come through Booking.com and Agoda, as well as through the website.
10. **Distribution channels** – More than five.
11. **Tariff management** – These are advertised on the website. You enter where you are resident, and then either get a rupee or a US dollar rate. There are high, mid and low season rates. Sometimes in quiet periods special rates are offered and tend to bring a lot of weekend custom.

**Operation**

12. **Human resource management** – There is a payroll system, a line management structure, but there has not been much training.
13. **Staff performance** – The staff do their jobs well, except possibly in the spa. The problem is the ethnic tension.
14. **Customer service level** – A few additional services: internet access (good), laundry service, welcome drink, minibar in rooms, room service.
15. **Booking system** – computer operated.
16. **Accounting system** – Good systems, but clearly past checks were not robust enough.
17. **Waste management** – Solar hot water, and solar panels generating for the grid. Recycling, but no composting.

**Food and services**

18. **Kitchen facilities and hygiene** – Clean, modern kitchen, well maintained.
19. **Food quality and authenticity** – Option of Sri Lankan or Western breakfast. Daily menu for lunch and dinner with two or three choices for main course.



**Activity M15-2a-3: Handout 3 - Competency Checklist:**

Participant's Name \_\_\_\_\_

	Competencies	√
1	Generally displays the qualities of a successful business coach; being a good 'people person'; taking satisfaction in helping someone else to succeed; being a good communicator; being comfortable giving feedback; showing an aptitude for and good knowledge of business.	
2	Asks the clients useful and enlightening questions that help them find their own solutions / make their own decisions.	
3	Uses a suitable variety of question types to understand the business situation.	
4	Is able to assist a client make goals / objectives that are genuinely SMART.	
5	Is aware of potential resistance to change from various stakeholders and assists the client in considering this factor.	
6	Is able to use active listening skills to ensure effective communications.	
7	Is able to work collaboratively with the client and gently steer meetings to agreement.	
8	Helps a client understand the importance of KPIs to measuring performance.	
9	Can use raw data to design a KPI and measure performance against it.	
10	Steers the client towards identifying goals, setting objectives and designing KPIs, and does not dictate these to the client.	
11	While giving feedback, exhibits qualities that are conducive to the giving of effective feedback, such as asking appropriate questions at appropriate times.	
12	Shows self-awareness and during the coach-client relationship chooses how to react rather than reacting automatically, and displays and communicates values underpinning good coaching practice.	

Observer's Signature: \_\_\_\_\_



**Activity M15-2b-1: Handout 1 - Initial Evaluation And Analysis**

After discussing the case study, complete this form with your observations and ideas as a group.

**1. The business:**

- a. Although it is 'early days', come up with four SMART objectives regarding the business that you and your client could possibly work on. Make sure each objective is Specific, Measurable, Achievable, Realistic / Relevant and Time-bound.

i.

ii.

iii.

iv.

**Activity M15-2b-1: Handout 1 - Initial Evaluation And Analysis**

b. What possible ways would you measure performance (OPIs, BEIs)? Why?

c. What possible data collection and data analysis methods could you use? Why?

**2. The client**

a. Which coaching model would you use with this client first, the Blended Coaching Model or the TGROW model? Why?

**Activity M15-2a-1: Handout 1 - Initial Evaluation And Analysis**

b. What are your thoughts on the client's mindset – is it a Fixed Mindset or a Growth Mindset? Why?

c. What are your thoughts on the client's possible leadership style? Why?

d. What do you think are the possible challenges that might arise during your working relationship with this client? Why?

e. Are there any other considerations to mention about working with this client (e.g. how to develop a successful relationship, how to give feedback, ethical considerations, etc.)? What are they? Why?



**Activity M15-2c-1: Handout 1 - Action Plan Form**

Use this form to create an action plan where your group comes up with initial proposals for what to do about the business in the case study, by when, and saying what resources / inputs are needed.

Areas of Focus for Action	What to do - SMART Objective	Date Set	Resources / Inputs Required	Date Completed
<b>Product</b>				
<b>Marketing</b>				
<b>Operations / Systems</b>				

**Activity M15-2c-1: Handout 1 - Action Plan Form**

Areas of Focus for Action	What to do - SMART Objective	Date Set	Resources / Inputs Required	Date Completed
<b>Human Resource Management</b>				
<b>Environmental Sustainability</b>				
<b>Business Activity</b>				
<b>Other KPIs</b>				

**Activity M15-3a-1: Handout 1 - Role Card for Student A, Group 1****Roleplay 1: You are the coach. This is your role:**

It is clear that Hidden Garden needs a marketing strategy, but it needs a better understanding of its market and of market opportunities first. Otherwise Rajan and his sister could end up wasting resources with misdirected marketing. For that reason, two months ago, you agreed with Rajan that he would start keeping weekly statistics on room nights and nationalities of guests. He would also try to find out more about room nights and guests' nationalities in other hotels in Arugam Bay.

Two months have now passed and you are about to have your next meeting. You expect Rajan to have all the statistics and information about nationalities ready for discussion. Also, you had agreed with him that the two of you would spend some time in this meeting focusing on the garden and pond.

**Roleplay 2: You are an observer.****Roleplay 3: You are an observer.****Roleplay 4: You are the client, Rajan. This is your role card:**

You know you shouldn't respond so angrily to some of the comments made about your hotel on TripAdvisor. Often they are posted by rich, arrogant people from Colombo 7. But how dare they criticise your lovely house – the house your father worked so hard to build? Also, some of those people were very inconsiderate when they were guests at the hotel, for example, drinking alcohol, talking noisily and playing music in the garden late at night. This has all been very stressful for you. Maybe it is why you have been drinking a little more alcohol than usual yourself, recently. However, you can see it is not good for business.

Anyway, you believe this is a personal matter and you can get your temper under control by yourself. It's not something your coach should be talking about. You have hired the coach purely to help you with your business matters.



**Activity M15-3a-2: Handout 2 - Role Card for Student B, Group 1**

**Roleplay 1: You are the client, Rajan. This is your role:**

Your coach asked you to get information about the nationalities of guests staying at other hotels in Arugam Bay. You spoke to some other hotel owners, over a glass or two, and it seems there are actually a number of foreign visitors around. This has interested you. Now you want to spend your next meeting with your coach talking about how to create a good marketing strategy to get these foreigners coming to the Hidden Garden Hotel.

Two months ago, you agreed with your coach to keep weekly figures on room nights and nationalities of guests staying at the Hidden Garden Hotel. You forgot to do it the first month and a half, but you kept figures for the past two weeks. Unfortunately, you have lost the piece of paper with the figures written on it. That's not important, however. You want to find a good marketing strategy to attract those foreigners. You don't want to talk about anything else until this is discussed.

**Roleplay 2: You are an observer.**

**Roleplay 3: You are the coach. This is your role card:**

You have never understood why people keep fish and fish ponds. You find this especially strange in a country like Sri Lanka, where mosquitos are a big problem.

In a previous visit you talked about the garden and the stagnant pond, which is a risk for mosquitos, and lizards, snakes and goodness knows what. You and Rajan agreed that the garden needed to be mown more regularly, the bushes pruned back, some flower beds planted, and the wall repainted. It should have all been done during the past two months. However, walking into the Hidden Garden Hotel for your meeting today, you see that the grass has been cut – but nothing else has been done. You strongly feel the pond is a health risk and should be filled and grassed over.



**● Activity M15-3a-3: Handout 3 - Role Card for Student C, Group 1**

**Roleplay 1: You are an observer.**

**Roleplay 2: You are the coach. This is your role card:**

Last month Ranjan agreed to tackle the quality of work from the two older men. He had agreed that the rooms his sister could check on were cleaner, so the men clearly were capable if they were checked. Therefore, you agreed that Ranjan would create and use a checklist for the work they did, and write job descriptions for them, to make it clear what was expected of them. You strongly believe that this is the way forward. Ranjan needs to be open, honest and clear to all.

So you were slightly surprised to see online this morning, just before you arrived at the Hidden Garden Hotel for your next meeting with Ranjan, a review on TripAdvisor complaining about dirt in one of the chalets. What has happened, you wonder?

**Roleplay 3: You are the client, Rajan. This is your role card:**

There has been a lot of rain for the past two months, which has really halted the garden work. You totally agree that the garden should be tidier, and the wall repainted, but it will have to wait until after the rains.

What you don't agree about is the pond. It used to be clean, with beautiful goldfish which you loved as a boy. You think that if it is cleaned up and restocked, maybe with some nice water plants, too, it will be a really attractive feature, and help get good reviews. You know it will have to be safe for small children, and that will mean building a small fence around it. You know what you want but can't think of how to go about getting it, or where to start.



**Activity M15-3a-4: Handout 4 - Role Card for Student D, Group 1**

**Roleplay 1: You are an observer.**

**Roleplay 2: You are the client, Rajan. This is your role card:**

You agreed in the last meeting that you had to speak to the two older employees, the men from your father's time, about the quality of the cleaning and gardening. But one of them is 57 and the other 62. They both started working for your father in the 1980s. They were adults when you were a boy in shorts! But now you are 'mahatiya'.

So you did talk to them, gently. You asked them that please, for your sake, would they try harder? You really don't want to do anything more severe. You certainly don't want to go checking up on their work, or writing job descriptions, as the coach suggested. That would be embarrassing. Anyway, you are sure their work must have got better after your talk.

**Roleplay 3: You are an observer.**

**Roleplay 4: You are the coach. This is your role card:**

Every visit so far (this is the fourth one) you have brought up Rajan's tendency to respond inappropriately to website complaints. He says he understands exactly why he should not do it, and how it could affect his business, but he becomes furious when he sees some of the criticisms that people make. In the last meeting, he got so angry about it that he used some foul language. This shocked you. In fact, you thought he may have been drinking.

You now feel you should suggest anger management therapy to Rajan if this goes on. You know a couple of people you could recommend if he is interested. You saw another angry response on TripAdvisor just a week ago. You worry that this could endanger the business.



**Activity M15-3a-5: Handout 5 - Role Card for Student A, Group 2****Roleplay 1: You are the coach. This is your role:**

In your last meeting, you discussed Gayan and the spa. You agreed that Indika would have to have a formal sit-down meeting with him before today's coaching session, and made this into a SMART objective. In this meeting, Indika agreed that she should present the feedback, ask why this was the case, and what Gayan would do about it. The idea would be to have a customer feedback form, which Gayan would design, with targets for improvement. If Gayan proved hostile to the suggestion, Indika would challenge him on this hostility, and ask him to explain why customer feedback was not appropriate. You half-expect this may have caused Gayan to resign. But you also worry Indika may have avoided the issue.

**Roleplay 2: You are an observer.****Roleplay 3: You are an observer.****Roleplay 4: You are the client, Indika. This is your role card:**

Finance is your area. It's your comfort zone. It is what Susan asks about every week, too, though she is focused on a high level – income, expenditure, profit. Your predecessor Ashan left very suddenly and your instincts tell you that there were problems. Specifically, you think that an invoice list possibly contained items that were never bought, maybe six that were delivered out of ten bought. Perhaps Ashan was sharing the difference with the suppliers?

You have no proof that Ashan was doing this or that anyone else was involved if he was. The accounts have always been approved by the accountant and signed off. EPF / ETF is up to date, so you are not sure whether you should do any investigating or not. You haven't discussed this with your coach in previous visits as you feel it belongs in the past. However, you worry that another member of staff was involved in Ashan's operation. You worry too that the staff member is still at the Emerald Forest and still stealing.



**Activity M15-3a-6: Handout 6 - Role Card for Student B, Group 2**

**Roleplay 1: You are the client, Indika. This is your role:**

You have spoken to the coach about Gayan and the spa previously. You had agreed that you would have a sit-down meeting with him before this coaching session, present customer feedback to him, and encourage him to take responsibility for designing, implementing, and then acting on a customer feedback form. You were dreading this meeting, though.

Anyway, for the past month, quite a lot of new information about financial irregularities has come to light, and you have focused on this. It's true that this area of work is your 'comfort zone' but it is important. Still, deep down you are aware that maybe you are avoiding confrontation with Gayan. You have also heard that he's been saying nasty things about you behind your back, in the village. That is not making you look forward to a meeting with him.

**Roleplay 2: You are an observer.**

**Roleplay 3: You are the coach. This is your role card:**

You have previously discussed with Indika the issue about the communal space, and how some people want to spread out. Indika had a SMART objective of getting a builder, surveying additional space for a 'quiet' eating area, and building this with the same materials as the existing building. The cost would be LKR3M. The next step was for Indika to call Susan.

Since your last meeting, you have been to a hotel which has three interconnected buildings. The big one in the middle is like the one in Emerald Forest, while the side ones are a bar and a shop, respectively. The shop sells local products, food, tea and clothing, as well as sun oil and so on. The furniture and goods in it can be cleared away to make a private dining area in the evening.

**Roleplay 4: You are an observer.**



**● Activity M15-3a-7: Handout 7 - Role Card for Student C, Group 2**

**Roleplay 1: You are an observer.**

**Roleplay 2: You are the coach. This is your role card:**

You were disturbed to hear about the tensions between different communities among the staff. As an urban, educated Sri Lankan, this is somewhat alien to you.

Previously, you agreed with Indika that the solution may be in a clear personnel structure, with line management, including reporting lines, job plans, and evaluations. The objective agreed in the last meeting was for Indika to hold an all-staff meeting and introduce the concept. You have prepared some suggestions for implementing this. Also, you have had an idea about a team-building day. There are organisations that arrange this.

**Roleplay 3: You are the client, Indika. This is your role card:**

You have previously discussed with the coach the issue about the communal space, and how some people want to spread out more. You had a SMART objective of getting a builder, surveying additional space for a 'quiet' eating area, and building this with the same materials as the existing building and with a roofed pathway between the buildings. The cost would be LKR3M. The next step was for you to call Susan.

Susan did not react well, though she was kind. She is such an exuberant character, loves being the life and soul of a party, and can't understand why people would want to go off by themselves for a quieter, more private experience. She clearly thinks there is something wrong with people like that and ignores the feedback that you tell her about. She said that if there was going to be another building, it would need to be a bar, or a shop, not a separate dining area.

**Roleplay 4: You are an observer.**



**Activity M15-3a-8: Handout 8 - Role Card for Student D, Group 2**

**Roleplay 1: You are an observer.**

**Roleplay 2: You are the client, Indika. This is your role card:**

Previously you agreed with your coach that the solution to the ethnic tensions may be in a clear personnel structure, with line management, including reporting lines, job plans, and evaluations. The objective agreed in the last meeting was for you to hold an all-staff meeting and introduce the concept.

You held the meeting, but it did not go well. While there was no open hostility in the meeting, there was a sort of sullen, bad-tempered silence. Passive resistance, it felt like. And a few days later, you happened when passing the kitchen to hear Hasan complaining about it. He said he was not going to have any Sinhalese person who didn't know one end of a screwdriver from another tell him what to do! You are worried about implementing this new structure.

**Roleplay 3: you are an observer.**

**Roleplay 4: you are the coach. This is your role card:**

You know from Indika that her predecessor, Ashan, left quite suddenly. He had been manager of the Emerald Forest for six months. You have not asked Indika what the reason for his leaving was, as you believe this belongs to the past. Your relationship with Indika, you feel, is all about now and the future.

Meanwhile, you wonder sometimes if a root cause of the ethnic problems in the staff is connected with dishonesty. You have worked with other businesses where one member of staff was dishonest in some way, even stealing things. This led to resentment from the staff members who knew about it but who didn't think it was their responsibility to report the issue. Anyway, you decide to raise this possibility with Indika in your next meeting.



**Activity M15-3b-1: Handout 1 - Observation Task**

Coach's name: \_\_\_\_\_

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)		



**Activity M15-4-1: Handout 1 - End of Course Test**

There are 30 questions, and you have 30 minutes. Circle a, b, c or d to mark your answer.

1. "A coach can help a client to associate with others in the same industry, so that they are better able to represent their interests at the local and national levels."  
What is the coach helping the client to do here?

- A. Build self-confidence.
- B. Nurture staff
- C. Delegate.
- D. Network.

2. What should a business coach not do for a client?

- A. Make decisions for the client so that problems and challenges are avoided.
- B. Work alongside the client to help them define a vision for the client's business.
- C. Identify goals and implement strategies that will help the client achieve objectives.
- D. Help the client to navigate problems and challenges in the most effective way possible.

3. What does reframing mean?

- A. We focus on a better future rather than failures and mistakes of the past
- B. We see challenges, failures and mistakes as opportunities to learn.
- C. We do not allow ourselves to get upset at every challenge, failure or mistake.
- D. We can bounce back from disappointment, failure etc

4. Of the following coaches' roles, three are Outside-In. Which one is Inside-Out?

- A. Showing the client how to do something technical
- B. Giving honest feedback
- C. Helping the client get insight
- D. Sharing your experience

5. If a goal or objective is SMART it is:

- A. Specific, Mathematical, Accurate, Realistic, Tidy
- B. Smart, Mature, Accurate, Realistic, Tidy
- C. Specific, Measurable, Achievable, Realistic, Timebound
- D. Smart, Measurable, Accurate, Realistic, Timebound

6. 'Average spend per visitor' is an example of:

- A. Wishful thinking
- B. Key Performance Indicators
- C. The state of the economy
- D. Financial planning

**Activity M15-4-1: Handout 1 - End of Course Test**

7. The two internal factors in a SWOT analysis are:
- A. Strengths and weaknesses
  - B. Opportunities and Threats
  - C. Strengths and Opportunities
  - D. Weaknesses and threats
8. TGROW is an example of:
- A. Measurements of financial performance
  - B. Organisational structure
  - C. Coaching Models
  - D. Tourism industry associations
9. What is the order of steps an employee typically goes through when faced with change, according to the Scott & Jaffe Model?
- A. Resist - Deny - Commit - Explore
  - B. Explore - Resist - Deny - Commit
  - C. Commit - Explore - Deny - Resist
  - D. Deny - Resist - Explore - Commit
10. The picture, shared with all staff, of where a business is heading in the future, what it wants to achieve, and how is called:
- A. Mission
  - B. Vision
  - C. Session
  - D. Target
11. Which is bad advice for communication?
- A. While listening, focus your attention fully on what the person is saying.
  - B. 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
  - C. If the person you are talking or listening to doesn't make eye contact with you, you should still try and look at him or her to draw them in.
  - D. When you are stuck listening to a boring speaker, then it's best to switch topics quickly.
12. What should a coach do if a coach and a client consistently fail to develop rapport?
- A. Ignore the situation. It's best not to think about it too much.
  - B. Be open and blame the client and give them a list of things they need to do in terms of behaviour.
  - C. Try to change your ways and try to do what the client wants you to do. Things will work eventually.
  - D. If this situation is continuing then, it is better to acknowledge this earlier on, so that you can help switch the client to another coach.

**Activity M15-4-1: Handout 1 - End of Course Test**

13. Which of these steps should not take place on the first day of coaching the client?
- A. Ask the client what they want to achieve from the coaching.
  - B. Use KPIs (Key Performance Indicators) to evaluate their business performance
  - C. Appear warm, personable, approachable. Think of body language, eye contact.
  - D. Find out about the client: name, family and general background and some other general questions to make them feel at ease.
14. Which is not a description of empathy?
- A. creates connection between people
  - B. requires putting yourself in another person's shoes
  - C. Looks on the bright side in a bad situation, to make it sound less bad
  - D. is the ability to share and understand the feelings of another person
15. A fishbone analysis is used....
- A. to collect problems together and prioritise them
  - B. to identify the root causes of a problem
  - C. to compare different solutions to a problem
  - D. for all of the above
16. You can design KPIs for the following areas of business:
- A. Product, Marketing, Systems and other areas
  - B. Product, Marketing, Systems only
  - C. Product and Marketing only
  - D. Product and Systems only
17. Which of these statements is something a person with a Growth Mindset would not say?
- A. "That went badly. What can I learn from the experience?"
  - B. "Failure is not growing and staying the same."
  - C. "I do badly, however much effort I put into it."
  - D. "If I can put in more effort, I can succeed."
18. An employee is extremely demotivated because she is always micromanaged by her boss. Which of the following values is probably important to her?
- A. Collaboration
  - B. Honesty
  - C. Loyalty
  - D. Independence

**Activity M15-4-1: Handout 1 - End of Course Test**

19. Which of these modes of learning is best for developing critical thinking and problem-solving skills and for learning how to do something creative?
- A. Experiential
  - B. Demonstration
  - C. Explicit
  - D. Guided
20. What percentage of people in Sri Lanka are considered persons with disability?
- A. 8.7%
  - B. 4.2%
  - C. 11.3%
  - D. 6.0%
21. Who makes the decision when the consultative method is used?
- A. Everyone agrees on the decision
  - B. The leader
  - C. The majority
  - D. The leader and the majority
22. There are Intrinsic and Extrinsic motivators. Look at the motivators listed below. Three belong to one category, and only one to the other. Which is the odd one out?
- A. Good interpersonal relations at work.
  - B. Promotion.
  - C. Praise.
  - D. Job security.
23. At first, which of these approaches and techniques would you not use in feedback with an inexperienced client who finds it hard to find solutions for their problems?
- A. Using explanations.
  - B. Using demonstrations.
  - C. The guided approach.
  - D. The collaborative approach.
24. Which of these things would you say is a 'don't' rather than a 'do' of giving feedback?
- A. Give the client clear judgements on their performance.
  - B. Give feedback soon after the event.
  - C. Give feedback in a private session.
  - D. Give feedback while being calm, polite and professional.

**Activity M15-4-1: Handout 1 - End of Course Test**

25. Which of these questions would you not ask early on in a feedback session?

- A. What went well?
- B. What changes would you like to make next time?
- C. May I tell you what I liked?
- D. What did you notice about your performance?

26. Which is the current model of disability advocated by the United Nations?

- A. Medical model
- B. Human rights model
- C. Social model
- D. Blended model

27. Which of the following is not a step on the Coaching Journey?

- A. Set the tone
- B. Set SMART options
- C. Lay the foundation
- D. Decide on goals

28. Which is not an example of a limiting belief?

- A. "I'm not educated enough to be a speaker"
- B. "I could never run my own business"
- C. "I could succeed at social media marketing if I studied it"
- D. "I'm not good at marketing"

29. Which of these is not one of the seven steps of building your brand?

- A. Get organised
- B. Identify who your ideal coaching client is
- C. Advertise regularly
- D. Start pitching

30. On the CPD cycle, what follows Identify?

- A. Plan
- B. Learning activities
- C. Reflect
- D. Apply



● **Activity M15-6-1: Handout 1 - Course Feedback – Business Coaching Course**

We would like to take this opportunity to thank you for your valuable contribution to these training sessions. We hope that you have found the course useful and will take away the skills and information you have learnt and be able to use them productively with clients.

In order to help us improve we would really appreciate your time in completing this questionnaire.

Course Feedback Form Please complete this form and give us your feedback				
Training Course	Strongly agree	Agree	Disagree	Strongly Disagree
The training was useful				
The training raised issues I was not aware of				
The training was relevant to my needs / the needs of my future clients				
The training showed me things I can implement in my coaching work				
The training will ultimately benefit businesses in tourism and hospitality in my local area				
The training will help me coach others effectively				
<b>Materials and Activities</b>				
The materials were clear and easy to understand				
There was a range of different activities				
The activities were interesting, and sometimes even good fun				
The activities were useful and informative				
The materials and activities gave me time to reflect on my own role as a coach				

**Activity M15-6-1: Handout 1 - Course Feedback – Business Coaching Course**

Trainer	Strongly agree	Agree	Disagree	Strongly Disagree
The trainer was knowledgeable				
The trainer gave us time to reflect				
I feel confident in using this training with my clients.				

How will you apply the training in your work?

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How could the training be improved?

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**Activity M15-6-1:**

**Handout 1 - Course Feedback – Business Coaching Course**

What is the main thing you will take away from this course?

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Do you have any further comments or suggestions about the training? (Content, activities, materials, manual)

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**Thank you again for your time and comments.**

**We wish you every success for the future.**





