



## Training & Coaching for Performance

As a small business owner, it's vital that your employees are able to perform a wide range of tasks at a competent level. Training is often done ad hoc and by the business owner when they have time.

To reach their highest level of performance, employees need coaching which requires focus and consistency, as well as specific skills.

Training is a process that can be completed, but coaching is ongoing. Because the small business owner needs to spend their time working on their business rather than working in it, both coaching and training need to be completed efficiently and effectively. The main challenge is that the small business owner is usually not able to afford the expertise required for either.

Using the tips in these pages, will help you make the most effective use of your time when you train and coach your employees.

## Reduce Turnover

When employees leave the company, there are costs to you as the owner. The costs are created when the employee leaves and when you hire someone new. Think about how much these factors cost you:

**Lowered productivity:** If you had a team of three people, and one leaves, then at least part of the work won't get done.

**Overworked remaining staff:** The remaining employees – or you – need to take on some of the load. This can make people stressed and reduce their productivity.

**Lost knowledge:** People leave and take knowledge with them. It might be the knowledge of how to deal with that challenging customer or how to get that supplier to deliver early. Whatever it is, that knowledge is gone.

**Hiring costs:** Your time and effort to advertise, interview, and hire a new employee are worth money.

**Training costs:** A new employee needs to learn the job. While that's happening, someone has to train them, and both the trainer and the new employee are producing less than two fully trained employees.



# Training & Coaching

## Making the Most of Your Training Efforts

Training and coaching are two different things, but they are linked. The main difference between them is that training gives the employee the information they need to do the job. Coaching on the other hand, gives the employee the information they need to do the job better.

Let's start with training because coaching can only be successful when the employee has been trained.

There are four common approaches to training. Each role and employee will be different. Often you'll need to build a training plan that includes more than one approach.

Here's the quick definition of each of the training methods.

**Classroom** can be an actual classroom, or it can be a quiet desk in the corner of the office. The activities are often reading or working through practice scenarios. Classroom training can be facilitated by a leader or be self-study. This can be for new employees or for existing employees as they take on new tasks.

**On-the-job** is often used with new employees. When the employee has been given the basic knowledge they work with customers under observation so that their activities can be analyzed and measured against expectations.

**Basic skills** testing can be conducted on-the-job or in the classroom. Often this training is to supplement to other skills development. It can also be used to assess skills that an employee gained outside the workplace.

**With a buddy** is a graduated process. It can be observation and feedback as the new employee gains knowledge of the job, or it can be a system that has the new employee observe someone do the task, discuss the observation, and practice the task. Then they get feedback, and then work independently when they have achieved a level of competence.

## The Benefits of the Four Methods

**Classroom training** is the safe environment. There are no distractions, and there are no repercussions of making a mistake.

Whether the training is formal or informal, you need to have at least a list of skills that need to be learned and a way to identify if the employee has 'passed' the training session.

It's difficult to coach an employee if they don't have the basic knowledge. It's even more difficult if you think they have knowledge that they really don't.

Depending on the job, training may include just a list of skills. For instance, you must be able to add a column of figures, or you must be able to write code in a specific language.

# Training & Coaching

Training can be situational, an example of that could be handling complaints. There will be a process and series of forms or steps to take when resolving client complaints.

Breaking training into steps that can be mastered one after the other is the most successful way to train someone. This can be challenging with some more complex jobs, but it is a key factor in learning.

**On-the-job training** is often the next step after classroom training. The employee has gained the knowledge of the necessary steps to complete the task, and now they need to become comfortable in the application without feeling abandoned.

Imagine learning to dance. The instructor takes the student through the steps without music and with no concern about rhythm so the muscle memory is built. This is equivalent to classroom training. The next lesson is to dance to the music, and build the rhythm. This is an example of on-the-job training.

Setting goals will mean the training time is efficiently used. Knowing what the outcome needs to be will drive the training plan. There needs to be support in place so the employee knows where to go with questions.

Observation is important. Whether that's the trainer watching, or a switch of between observing and practicing, the employee being trained can't assess their own progress.

Depending on the complexity of the work, using a Watch then Try approach can be effective to reinforce the learnings. The trainer will demonstrate the actions or situation, and then the new employee will perform the same thing, getting feedback immediately.

**Basic skills training** is the simplest of the training approaches. You will find this useful if you are hiring people with specific skills. You may want to instigate a testing system to assess what further training they need.

For instance, if you hire a short order cook for your diner, you will want to test the ability to cook specific meals quickly and perfectly before you leave them as the only cook on your busiest shift.

**Working with a buddy** is more than just having someone oversee the on-the-job training of the new employee. The buddy can provide on-boarding to the culture of your organization, they can help the new employee with everything from how to find the form they need for the customer, to where to go for lunch.

Buddy systems can be set up for the first week on the job, all the way through the probationary period of the new employee.



# Training & Coaching

---

## Preparing for Training

The first step in training is to assess the status of an employee's knowledge, because an employee who hasn't been trained can't be successfully coached. An untrained employee will struggle with the concepts of improving their performance because they don't know the basics.

When creating the training plan, assessing what needs to be learned is based on comparing the job requirements to the situation of the employee.

When you have the assessment, you can work with the employee to develop the list of skills they need to learn so the training is tailored to their needs. Then you create the training plan which will include a timeline, delivery method and a way to know if you've been successful.

It is important to be clear on how you will know whether the employee has achieved the knowledge they need to for the job. Without the clarity, you may find yourself assuming the wrong level of knowledge and that will waste your effort when it comes to coaching.

## Coaching Employees

Coaching your employees is about raising their level of performance on their job.

Why coach? For the same reason that professionals get regular coaching on both their weaknesses and strengths.

Remember, a runner maybe the fastest right now, but that will always change as other runners develop their strengths. You can be sure that athletes pay a lot of money for coaching. And CEOs of giant corporations get coached to elevate their performance.

You coach your employees differently depending on their current level of performance. It may seem like your **high performers** don't need to be coached. They are delivering results and that should be enough, right? Just like the professional athlete, they need an outside view on the opportunities to improve.

The **struggling employee** can be someone who is new on the job. This is an employee who has been trained, but doesn't have experience. Or it can be an employee who has been in the job for a while but having difficulty reaching a consistent level of performance.

It's important to keep the struggling employee's confidence up while you work through the coaching because coaching that is perceived as a punishment won't work.

Remember this is about improving, not arming yourself to fire someone. So it's important to identify successes and to be clear that you expect incremental steps toward improvement. This is how you support the employee as they face the challenge of new ways to do their job.



# Training & Coaching

---

## Preparing for Coaching

When coaching employees it's important to get yourself ready for the sessions and be clear on what needs to be done. As you prepare for a coaching session remember that this will be an ongoing activity during the employment of that individual. Setting up regular meetings allows you to keep some continuity to the discussions and will allow you to see progress over time.

The last thing to do to prepare to coach is to have an action plan. Good, effective coaching is about having milestones, behaviors and actions to take.

A coaching plan with milestones will look like this:

- Dates: in 3 months
- Specific milestone: increase net sales by 25%

A major part of closing the coaching session is setting up the next one. The coach wants the employee to be eager for the coaching next time so that they don't have to spend time working through resistance every meeting. The secondary goal for the coach is to make these sessions collaborative so they can move to the next level.

As the coach, you will want to document the results of the meeting. This is because you have many other things to do and you want to be able to access the details quickly to make the next meeting effective. See the template at the end of this document.

## Peer Coaching

Peer coaching is a way to give your high performers a chance to help the employees who are struggling. And it gives you a chance to see a different approach to coaching.

Another benefit of peer coaching is that the coaching employee can get satisfaction out of helping someone improve, which is different from the satisfaction they get from meeting their own goals. That can lead to much more engaged employees. It also means you retain your good employees rather than have them leave for a new challenge. And that means you don't spend time hiring new employees.

Using your strong employees to support the developing ones gives you a new perspective on both employees. Your superstars are much closer to the actual work than you are because they do it every day, so their guidance will likely be more practical than yours.

When you initiate peer coaching, you need to be clear what your expectations are with the coaching employee, and how they can work to meet those expectations.

You need to debrief, which is exploring the answers to three questions: what went well, what needs to be changed, what should be stopped. And you go through the debrief process with both employees until you are sure the coaching is working then you can step back a little, checking in periodically to ensure everyone is still on track.



## Coaching Template

Name of employee:	
Date:	
Preparation:	
Goals for the session:	
Notes:	
Commitments:	
Next Steps:	