



Monthly Coaching Guidance

Updated May 23, 2022

Purpose:

To maximize the impact you have with the CEO or team leader when meeting with them before one of their monthly MIND Meetings.

Scheduling:

- Preference is to schedule the 30 minutes of coaching immediately before one of the weekly MIND meetings you plan on attending each month. This ensures that any opportunities or issues uncovered in the coaching session can be addressed in the team meeting that follows. If this is not possible, then the day before works as well.
- After weekly meeting #8 is good practice to transition online calendars to the client owning the calendar and have them invite you to their weekly meetings. You should also remind the leader that you will be inviting them to one coaching session each month before the team meeting you will be attending. It is recommended you schedule for the next 10 months at that time as it is better to be on their calendar early than to keep scheduling each month.
- A best practice is to place a calendar reminder for yourself when you are in month 11 or 12 of a 1 year engagement to ensure you are positioning for additional services after the first year's engagement when appropriate.

Agenda Creation:

- Create a custom meeting series in the client's ETW instance .
- Make yourself and the CEO/Team Leader.
- Titles for the meeting series could include "Coaching Session" or "Pre Meeting Coaching" or "1:1 Person A/Person B"

- Agenda topics can include whatever works for you, the ultimate goal is to help the leader improve what is most important, here are some suggestions below. Sometimes just one agenda topic can be used, sometimes a combination can help with the kinds of feedback you want to give and the personality of the leader. Below are some common topics that can be used:
 - a. Improving your MIN
 - b. Observations and Recommendations
 - c. What is going well? What needs improvement?
 - d. Next steps

Preparation:

- Review all of the meetings that you missed since the last coaching session and look for any issues, challenges, bottlenecks, trends that are transpiring
- Look for any opportunities to better utilize the methodology (missing check-ins, skipped meetings, late actions) and be prepared to discuss and address the root cause.
- Review the team's plan, MIN, Drivers and Action Items and see if there is any disconnect between the opportunities or issues identified and the actions, projects, initiatives that are active
- Pre populate the appropriate agenda item with notes to ensure you address any of your observations

Coaches Mindset:

- Your goal is to coach the leader to effectively drive their MIN and leverage the MIND Methodology with the same sense of focus and urgency you would expect if it was your own organization **but at a pace that the leader can adapt to**
- **Be flexible and ensure during the coaching sessions and meetings that the big areas of focus, initiatives etc. are moving forward. Don't get caught up in the leader checking the box with the methodology as this takes time, as long as the team is focusing on what is most important!**
- Be prepared to find the right items to discuss and drive the business and mindset of the leader. Here are some questions to consider that help you better understand the client's business so you can be a better coach:



- a. What is this business and its challenges?
- b. How does the business make money?
- c. What are their strongest competitors doing well?
- d. Do you feel like you could run/lead this business?
 - i. If not, how can you get your mindset there?
 - ii. What would you need to know more about to fully understand where the leader and team need to focus their efforts? (Find out these answers in the next coaching session or through research)

Questions and Actions to drive the discussion:

- Here are some open questions that may reveal opportunities to deep dive during the meeting:
 - a. How are things going for you?
 - b. What are your biggest challenges/opportunities right now?
 - c. What do you feel your biggest bottleneck is?
 - d. What do you feel your biggest structural bottleneck is? (What is the current function holding us back more than all the others (marketing, sales, member experience, operations, etc.)
 - e. Are your in-focus drivers the right ones?
 - f. Last month when we met your X was a challenge. Has that improved (why/why not)?
- Use the following questions to validate that you and the leader have a clear and crisp understanding of the high level strategy, if you can't help them identify the answers to these questions, then you need to focus on getting there.
 - a. Where are we at? (where are we to plan with our MIN?)
 - b. Where are we going? (What is our target for our MIN, end of year and beyond?)
 - c. How are we going to get there? What are the key actions (think initiatives or projects) that are going to get us there?

Opportunities to add value:

During these coaching conversations, you can identify opportunities to incorporate additional scopes of work and service offerings if they will truly help the team improve their MIN including:

- Strategy, Performance Management, and Intentional Culture beyond the leadership team
- Introducing 1:1 meetings and retrospectives to the leadership team.



- Facilitating the implementation of the methodology to a leader or part of the organization that is limiting the organization's growth or progress
- Extending monthly coaching beyond the 12 month scope with the leader

