How to Prepare for an Effective Coaching Session

Introduction
This checklist is designed to help you to prepare, deliver and follow up a coaching or mentoring session with one of your team members. This logical, structured format should enable a session to run smoothly and effectively.

Preparing for the Session
Check the FOE factor (Focus-Openness-Energy)
Agree when and where the session will be held.
If applicable, review the last session and progress since the last session to see if there is anything that needs to be discussed further.
Consider the individual’s behavioural patterns and learning needs, and their preferred learning style.
Share expectations as to what the session will entail.
Draw up a plan,S to structure the session in a logical fashion.

Conducting the Session
Always focus on the individual’s needs.
Review progress since the last session and celebrate achievements.
Agree on learning objectives for the session with the individual.
Agree on how the session will be structured and what will be discussed.
Focus on opportunities for the individual to practise what they have learned back at work.
At the end of the session, summarise the main learning points.
Agree with the individual what they are going to do following the session, the timescales and who else will be involved to support them.
Ask the individual what they would like you to do to help.
Agree the date, time and venue for your next session.

Following the Session
Make brief notes on what was covered, how the session went and what both of you got from it.
Plan how you will review the individual, observe what they are doing and obtain feedback from others involved.
Note any personal actions in your diary.
Brief anyone who will be involved in what the individual will be doing as a result of the session.
Arrange for any necessary resources to be put in place.
Work out your expectations of what the individual should achieve by the time of the next session.
Prepare for the next session.