

OBSERVER/FACILITATOR CHECKLIST

Assess

Exercise 1 – The First Session

Note the Assess items the coach covered in his/her session:

- ☐ Sets the foundation for the relationship effectively.
- ☐ Clearly communicates the distinctions between coaching and other support professions.
- ☐ Understands and effectively discusses with the client the guidelines and specific parameters of the coaching relationship (e.g., logistics, fees, scheduling, inclusion of others, if appropriate).
- ☐ Reaches agreement about what is being offered in the coaching relationship and about the client and coach's responsibilities.
- ☐ Determines whether there is an effective match between his/her coaching method and the needs of the prospective client.
- ☐ Establishes a coaching presence that is present and flexible during the coaching process.
- ☐ Accesses own intuition and trusts one's inner knowing – “goes with the gut.”
- ☐ Sees many ways to work with the client and chooses in the moment what is most effective.
- ☐ Confidently shifts perspectives and experiments with new possibilities for own action.
- ☐ Demonstrates transparency about coach's observations of client and understands “self as coach.”
- ☐ Demonstrates confidence in working with strong emotions and can self-manage and not be overpowered or enmeshed in clients emotions.

Note core coaching skills:

- ☐ Shows genuine concern for the client's welfare and future.
- ☐ Creates a safe, supportive environment that produces ongoing mutual respect and trust.
- ☐ Demonstrates respect for client's perceptions, learning style, personal being.
- ☐ Integrates and builds on client's ideas and suggestions.

Co-Create Goals/Action Steps

Exercise 2 – Powerful Questions

Note the Co-Create/Powerful Questions items the coach covered in his/her session:

- ☐ Asks questions that reflect active listening and an understanding of the client's perspective.
- ☐ Asks questions that evoke discovery, insight, commitment or action (e.g., those that challenge the client's assumptions).
- ☐ Asks open-ended questions that create greater clarity, possibility or new learning.
- ☐ Asks questions that move the client towards what they desire, not questions that ask for the client to justify or look backwards.

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- ☐ Integrates and builds on client's ideas and suggestions.

Exercise 3 – Goals/Action Steps

Note the Co-Create items the coach covered in his/her session:

- ☐ Brainstorms and assists the client to define actions that will enable the client to demonstrate, practice and deepen new learning.
- ☐ Challenges client's assumptions and perspectives to provoke new ideas and find new possibilities for action.
- ☐ Engages the client to explore alternative ideas and solutions, to evaluate options, and to make related decisions.
- ☐ Helps the client to focus on and systematically explore specific concerns and opportunities that are central to agreed-upon coaching goal.
- ☐ Promotes active experimentation and self-discovery, where the client applies what has been discussed and learned during sessions immediately afterwards in his/her work or life setting.
- ☐ Advocates or brings forward points of view that are aligned with client goals and, without attachment, engages the client to consider them.

- ☐ Consolidates collected information and establishes a coaching plan and development goals with the client that address concerns and major areas for learning and development.
- ☐ Creates a plan with results that are attainable, measurable, specific and have target dates.

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- ☐ Demonstrates respect for client's perceptions, learning style, personal being.
- ☐ Integrates and builds on client's ideas and suggestions.

Evaluate

Exercise 4 – Follow up

Note the Evaluate items the coach covered in his/her session:

- ☐ Clearly requests of the client actions that will move the client toward stated goals.
- ☐ Demonstrates follow through by asking the client about those actions that the client committed to.
- ☐ Acknowledges the client for what they have done, not done, learned or become aware of since the previous coaching session(s).
- ☐ Keeps the client on track between sessions by holding attention on the coaching plan and outcomes, agreed-upon courses of action, and topics for future session(s).
- ☐ Is able to move back and forth between the big picture of where the client is heading, setting a context for what is being discussed and where the client wishes to go.
- ☐ Promotes client's self-discipline and holds the client accountable for what they say they are going to do, for the results of an intended action, or for a specific plan with related time frames.
- ☐ Develops the client's ability to make decisions, address key concerns, and develop himself/herself (to get feedback, to determine priorities and set the pace of learning, to reflect on and learn from experiences).

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- ☐ Demonstrates respect for client's perceptions, learning style, personal being.
- ☐ Integrates and builds on client's ideas and suggestions.