

## Improvement Coach

### Overview

#### **Purpose**

The purpose of this module is to introduce the participants to the role of the coach and prepare them for the subsequent knowledge and skill-building sessions.

#### **Objectives**

At the end of this module you will be able to:

- Describe the roles and responsibilities of a improvement coach.
- Describe the relationship of the coach with the team leader.
- Identify changes that occur over time.

#### **Content**

- Roles of a improvement Coach
- Coaching Knowledge and Skills
- Relationship Between the Coach and Team Leader
- Changes that Occur Over Time

### Roles of an Improvement Coach

improvement coaches have three main roles:

1. **Facilitator** - A facilitator will observe team processes and give both supportive and corrective (or constructive) feedback to the team about the way they interact and the way work gets done.
2. **Trainer** - A trainer imparts knowledge and builds skills among individual team members and with the team as a whole.
3. **Improvement consultant** - An improvement consultant is an expert in directing the steps of quality improvement / problem solving, quality design, data gathering and analysis. In some organizations, the coach also helps to establish the Quality Assurance program within the organization itself.

This training will focus on the first two roles of facilitator and trainer. In this capacity the coach for improvement teams:

- Helps the team leader plan, conduct, and evaluate meetings.
- Delivers just-in-time training on improvement and team building topics.
- Observes team processes and gives both supportive and corrective feedback to the team about the way they interact and the way work gets done.
- Facilitates interpersonal interactions of the team, perhaps by assisting with conflict management, decision-making skills, or group exercises.

### **Coaching Goals**

A coach assists the team leader to guide the team toward completing its work in the most effective and efficient way. A coach's specific involvement with team members will vary, depending on the difficulty of the task, the skills of the team leader, and the stage of team development.

It is important that the team see the coach as a catalyst, promoting the team's ability to deal with its task.

***The coach does not solve problems, but helps the leader and the team to become self sufficient in the use of appropriate tools and procedures to solve problems by themselves.***

As the coach, team, and leader work together, the team and the team leader will become more skilled and the coach's involvement will diminish. Ultimately, the coach is no longer needed because the team is functioning well on its own.

### **Coach's Relationship to the Team**

If the coach is not a team member, he or she will establish a consultant relationship to the improvement team.

Sometimes the coach is a team member and fills several roles: facilitator, trainer, and team member. He or she analyzes problems and makes decisions just as the other team members do, but has the additional responsibility of facilitating discussions and interactions and training the team in improvement skills and group processes.

A team may want someone from outside the team to provide training, but may want someone on the team to observe group process and act as a facilitator (or vice versa). In that situation, the team will have an external coach for the training and an internal coach for facilitation duties.

There are several distinct characteristics of both the *external* coach (who is not a team member) and the *internal* coach (who is a team member).

#### **An External Coach:**

- Will find it easier to remain neutral during controversy.
- Is more likely to be able to offer new or different perspectives on issues.
- Will find it easier to remain neutral about the decisions being made and to remain focused on the decision making process.
- At first, may be perceived as an outsider and have to work hard for initial acceptance and respect.
- May have travel or time constraints that are different from those of the group members.

#### **An Internal Coach:**

- Is likely to have knowledge of the organization and people that can help the group.

- Is likely to be able to establish a trusting working relationship more quickly, since he or she may already be known to some of the group members.
- Is likely to be viewed by management as having commitment and accountability.
- Could be viewed by the other group members as less objective, as representing management or some other internal faction, or as biased in some other way.
- Needs to think in advance about how to handle the situation if, in a specific circumstance, he or she is not able to be (or is not perceived to be) neutral.

## Coaching Knowledge and Skills

A improvement coach needs a combination of communication, facilitation, and training skills. An effective coach has developed an understanding of how people work together in a team and how to improve the effectiveness of work within the team.

This training course will help coaches improve their communication skills and understanding of team dynamics, and to develop their facilitation and training skills.

### ***Communication Skills***

A coach should have the following skills:

- Active listening.
- Giving supportive and constructive feedback.
- Effective questioning.

### ***Facilitation Skills***

An effective coach can observe group processes in a team while it is working and intervene appropriately to improve its working processes.

The coach needs to know about and be able to facilitate:

- The stages of team development.
- Effective meetings.
- Decision making.
- Conflict identification, management, and resolution.
- Change.
- Creativity in team members.
- Communication with the organization through the preparation of written records of the team's work, such as storyboards and oral presentations.

### ***Training Skills***

A coach conducts training for teams and occasionally individual team members. Just-in-time training, presenting new information and skills while the team is working, is a hallmark of improvement training.

To be an effective improvement trainer, a coach needs to know:

- Principles of competency based, just-in-time training.
- How to create and maintain a positive team training climate.
- How to use interactive training methods.

### ***Improvement topics***

To apply improvement skills a coach needs to:

- Understand and explain dimensions and perspectives of quality, key processes of improvement, and ways to improve quality.
- Help a team define and clarify a topic (problem) to work on.
- Construct and analyze flowcharts, if needed for the problem analysis or solution.
- Help a team do cause-and-effect analysis and to construct and analyze a cause-and-effect diagram.
- Help a team determine how to collect data and information to measure the extent of the problem, and to verify causes of problems.
- Help a team analyze and display data and use run charts, bar and pie charts, if needed.
- Help a team develop and test solutions.
- Help a team monitor results to see if improvements have occurred.

## **The Relationship Between the Coach and Team Leader**

### ***An Agreement Between the Coach and Team Leader***

It is critical that the coach and the team leader have a good working relationship. They should have a mutual understanding, either oral or written, which covers:

- Their roles and responsibilities.
- The team objectives.
- The rules of confidentiality.
- The type of interventions the coach may make.
- The manner in which a coach intervenes so as not to undermine or seem to second guess the team leader.
- The manner in which the coach and the leader handle problems between them.

This mutual understanding can be updated as the group matures, but it must be the first order of business before any team meeting takes place. While it may seem awkward at times, it is important that these subjects be addressed in the beginning. It can save a great deal of misunderstanding later on. In order to develop a mutual understanding, the roles and responsibilities of both the coach and team leader and their shared responsibilities should be clear.

### ***Coach's Responsibilities***

Generally the coach is responsible for the following actions:

- Promoting and modeling improvement principles.
- Assuring that the team develops ground rules.

- Helping the team learn new behaviors consistent with ground rules as needed, e.g., positive feedback, respecting opinions of others.
- Using pre- and post-meeting sessions with the team leader to provide feedback and guidance.
- Providing just-in-time training for team skills, problem solving and the use of specific improvement tools.
- Identifying problem behaviors and dynamics and intervening appropriately.
- Providing feedback to facilitate the team's growth.
- Supporting the team leader.
- Remaining objective and dispassionate.
- Allowing the team and the team leader to make their own decisions.

### ***Team Leader's Responsibility***

Generally the team leader is responsible for the following actions:

- Setting the meeting agenda with input from the members.
- Conducting the meetings.
- Administrative duties, such as arranging meeting space, equipment, etc.
- Obtaining subject matter information for the team.
- Assuring that minutes and other information are recorded during the meeting (usually delegated).
- Making decisions and giving opinions about the issues.

### ***Shared Responsibilities***

The coach and team leader organize and coordinate their work together. They are jointly responsible for the following actions:

- Helping to establish a climate of cooperation and openness.
- Promoting the chosen improvement process or activity.
- Encouraging all members to identify and solve problems in team work.
- Focusing the energy of the group on the common task.
- Encouraging all members to share relevant information.
- Raising undisclosed issues.
- Reminding the team of its ground rules and operating procedures.
- Promoting consensus decision making.
- Never participating in secret agreements.
- Never talking about the team or its members outside the team meetings.

## **Changes that Occur Over Time**

As the team develops and moves through various stages, the role of the coach changes. For example, in the initial stage of team formation, a coach may use a more directive style as team members begin to trust each other and to work together. Directive behavior is fairly prescriptive and the coach (usually in conjunction with the team leader) rather than the team members, will take the lead in organizing activities, deciding which improvement tools or

techniques to use, and establishing when, where, and how tasks are to be accomplished. In short, the coach may need to be very task-oriented.

As team members' strengths emerge and skills are developed, the coach's behavior becomes more facilitative. In other words, the coach's activities change toward a supportive role, which helps and reinforces the team's efforts and decisions. As team members become more skilled, there will be less need (and less tolerance) for directive behavior.

The chart below indicates some of the differences in how directive and facilitative styles are used to interact with the team.

Directive Style	Facilitative Style
The leader and the coach determine objectives for the team.	Team members work with the leader and coach to set objectives.
The team leader develops the agenda with the assistance of the coach.	Agendas are set as part of the meeting process.
The team leader and coach determine the appropriate improvement tools to use.	Team members discuss and select the best improvement tool to use.
The team leader produces all records and is the only person who reports to supervisors.	Team members record the team's work, contribute to reports, and represent the team as needed.
Coach praises individual accomplishment and skill development.	The coach engages team members in self-evaluation and self improvement planning sessions.

**References and Recommended Readings**

Francis, Dave and Young, Don. *Improving Work Groups: A Practical Manual for Team Building*, San Diego, California: Pfeiffer & Company, 1992.

Scholtes, Peter R. *The Team Handbook*, Madison, Wisconsin: Joiner Associates, Inc., 1988.