

# **Coaching Methods Guide**

**for the  
Online Coaching Programme  
of the  
Autumn School for Sustainable Entrepreneurship  
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## Table of Contents

The 4-stage Coaching Process .....	3
Stage 1: Make Contact and Provide Orientation .....	3
Stage 2: Situation and Goals .....	3
Stage 3: Development of Solutions .....	3
Stage 4: Ensure Transfer .....	4
Content and Structure of Coaching Sessions .....	4
a. Template for Coaching Sessions .....	4
First Call .....	4
2 and 3 Phone Call .....	6
Final Call .....	8
b. Template for Coaching Call Summaries.....	10
Questioning Techniques.....	11
1. Open Questions.....	11
1.1. Problem-oriented Questions .....	11
1.2. Resource-oriented Questions .....	12
1.3. Solution-oriented Questions.....	12
Special Version: The Miracle Question .....	12
2. Circular Questions.....	13
3. Scaling .....	13
4. Paradox Questions .....	13
Goal Setting.....	14
Feedback Methods.....	14
5-Finger-Feedback .....	15
Top-Flop-Tip .....	15
List of references .....	15

# The 4-stage Coaching Process

The following structure can be seen as the overall direction of the coaching process as such. The four stages provide an comprehensible structure for conversation with the coachee.



## Stage 1: Make Contact and Provide Orientation

- Aim: creating a good basis for dialogue
- Guiding question: What is our coaching all about?
- Agree on the coaching process and framework conditions
  - setting (How often and in which way do we meet?)
  - handling unreliability
  - preparation of the coaching
  - taking notes during coaching
  - do we feel comfortable working together?
- Coach and coachee get to know each other
- Coach informs about his/her tasks and role
- Stressing the responsibility of the coachee (e.g. respect agreements)
- Expectation management: Expectations from both sides (e.g. explaining that coach is not expert in fundraising or other specific fields)
- Transparency of collaboration
- Key message: we are partners with clear and fair conditions
- End of phase: all relevant details is clear for both sides

## Stage 2: Situation and Goals

- Aim: defining and concretizing goals
- Guiding question: What does the coachee want to achieve?
- Understanding and clarifying the coachee's needs
- Understanding the coachee's current situation (see also questioning techniques: problem-oriented questions)
- Providing support in setting goals (see also questioning techniques: solution-oriented questions; SMART goals)
- Visualization and prioritization of goals might be helpful
- End of phase: goals and success criteria are defined

## Stage 3: Development of Solutions

- Aim: review action options and decide on concrete steps to reach goal(s)
- Guiding question: What does the coachee need on his/her path to reach the goal(s)? How can he/she proceed?
- Use of available internal and external resources (see also questioning techniques: resource-oriented questions; circular questions)
- Collecting, simulating and assessing possible options (see also questioning techniques: circular questions; miracle question)
- Coach holds back own ideas as much as possible, only if necessary (e.g. coachee has lack of experience)

- Coach supports in identifying chances and barriers of coachee's ideas
- End of phase: coachee knows how to proceed

## Stage 4: Ensure Transfer

- Aim: support coachee in overtaking responsibility for his plans and for a successful implementation
- Guiding question: How does the coachee want to ensure the implementation?
- Assessing implementation plans
- Evaluate objections and risks (again) as well as time requirement and (emotional) effort
- Concretization of implementation (measurable for coachee)
- End of phase: when coachee knows what to do and how to face obstacles
- Concluding collaboration and reflecting the coaching process and outcome

# Content and Structure of Coaching Sessions

The following templates facilitate the preparation, conduct and follow up of coaching sessions.

## a. Template for Coaching Sessions

The following template will guide you through your four coaching calls. The structure is based on the four-stage coaching process (contact and orientation, situation and goals, solutions, transfer).

### First Call

The first call is particularly important as it creates the basis for honest and trustful future conversations. At the beginning of your first call you will introduce yourself, elaborate on your role as coach and the program sequency as well as clarify expectations. Furthermore, the participants will introduce themselves and pitch their projects/businesses (focusing on vision, goals, strategy, target group, current challenges, etc.). Finally, it is crucial to touch upon expectations and wishes regarding each other and the coaching process itself.

#### 1. Welcome participants

- Check-in round (who are you? which project/business? where are you from? – keep it short)
- Schedule of today - explain today's goals: get-to-know each other, find goal(s) for this coaching process

#### 2. Introduction Coach

- Name, place of residence, project/business,
- Motivation for coaching, relevant experiences and/or know-how
- Explain your role as a coach and your expectations regarding coaching and collaboration

- Ensure that content and requirements of the program are clear to all participants: four coaching sessions (content, time frame, etc.) + participants need to send their “tasks” and questions before the next call
- Tell that there will be a coaching protocol (written by yourself or each of them)
- Discuss whether it is okay for you to take notes during the sessions

*Reminder!! Tasks of a coach – to clarify and manage expectations*

→ I am not a consultant or mentor, I am not responsible for providing solutions, I will not be part of your project and I will not take over specific tasks

→ As a coach, I will

- ask the right questions
- assist you in finding and implementing solutions
- help identify issues
- be constructive and guiding
- view things from your perspective
- accept that failure can be part of the project

→ Together we can clarify ideas, and work together to find new solutions so that your project can solve social problems

### **3. Introduction Participants - Understanding the Project** *(choose questions appropriate to the respective situation)*

Participants will pitch their businesses and current goal/challenge

- Who are you? Who is your team? How is it organized?
- What problem do you tackle and how?
- What is your project/business (idea)?
- Who is your target audience?
- What is your strategy?
- What is your revenue model?
- What have been your key learnings until now?
- What is the current status of your project/business? (On a scale from 1 – 10 (1 is the time when you started your project, and 10 means your project became successful) at what level are you now?)

### **4. Understanding the Current Goal(s) or Challenge(s)**

**Goals** *(choose questions appropriate to the respective situation)*

- What do you want to achieve long term? What's your vision?
- And what is/are your concrete next goal(s) for your business?
- How much personal control or influence do you have over your goal?
- What would be a milestone on the way?
- When do you want to achieve it by?
- Is that realistic?
- Is your goal that positive, challenging, attainable?
- Will that be of real value to you?
- How will you measure it?
- Do you have already ideas how to reach the next level/to achieve your goals?

→ ask hypothetical questions, miracle question, solution-oriented questions

**Challenges** *(choose questions appropriate to the respective situation)*

- What are your current challenges?

- What actions have you already taken to overcome them?
- What worked/what did not work?
- What results did that produce?
- What is happening now?
- What is missing in this situation?
- What is holding you back?
- What do you have (skills, resources) that you are not using right now?
- What is really going on (intuition)?

→ problem-oriented questions, solution-oriented questions

*note:* coaching is already taking place here, ask clarifying questions, understand the projects and the participants' point of view, give feedback (also other participants can ask questions and give feedback how they experienced the pitch)

## 5. Clarifying Expectations and Coaching Content

- What are your expectations and wished outcomes from this coaching?
- On which topic/challenge/goal should this four coaching sessions focus?
- What do we expect from each other? (e.g. punctuality, honesty, respect, ...)

## 6. Goals for the Second Call

- Guide the participants to formulate their own goals!
- What can be accomplished before the next phone call

→ Identify at least one SMART goal and a concrete first step to reach it

## 7. Task Until the Next Telephone Call

- Make an appointment for your next call
- Send an email with a summary of your call to the participants (e.g. you might use the template for coaching call summaries) and put Irina (irina.b@posteo) in Bcc
- You can also discuss with the participants, whether you or one of them will document the second phone call (following the example of your documentation from the first coaching-call)
- Ask the participants to email you an agenda, specific questions and progress report (action steps they have taken to reach their goals) 1-2 days before your next phone call appointment

## 8. Check-Out

- Feedback: how was this first coaching session for you?
- What do you take home from this session?
- What are your concrete next action steps to come closer to reach your goals?

## 2 and 3 Phone Call

After the first telephone call, continuous coaching sessions will take place. The goal is to enhance the participants' businesses by reflecting on their current business practices and supporting them do define concrete steps in order to reach their self-defined goals.

## 1. Check in

- How are you doing?
- What do you wish to gain from this session?
- What needs to happen in this session in order that you have the feeling the time was well spent?
- Any questions that came up after our last call?

## 2. Reflect Project Progress

- How did you proceed in achieving your goal?
- What worked well?
- What did you notice?
- Have you encountered any challenges?
- What could be the reason it didn't work out as expected?
- Is it possible to remove obstacles?
- What could you have done differently or better?

## 3. Current Status of Project Work *(in case one goal has already been reached and new goals/challenges will be touched on, otherwise you might continue with number 4)*

- What is the current status of your project?  
→ Here, for example, you can use the scale question:  
On a scale from 1–10 (1 is the time when you started your project, and 10 means that your project is successful) Where are you now? → What is the project team's evaluation → What needs to happen to reach the next step?
- What are the most important findings and challenges?  
→ Here, for example, you can apply perspectives and / or hypothetical questions:
  - I. Perspective: A good friend has this problem, what do you advise them?/ What would your partner/parents/grandmother tell you?
  - II. Hypothetical questions: Let's assume that/Imagine that

## 4. Investigating Options for Action *(choose questions appropriate to the respective situation)*

- What could you do to change the current situation?
- Tell me five options for action you see. Do not worry about whether they are realistic at this stage.
- What approach/actions have you seen used, or used yourself in the past, in similar circumstances? What could you learn from it for your own situation?
- What do you already know and what do you still need to learn?
- Which of your strengths might help you?
- What else could you do? What kind of support do you need? Where could you get them from?
- What if you would have...? (time, power, money, etc.) Then what?
- Who might be able to help?
- Would you like another suggestion from me?
- Which options do you like the most?
- What are the benefits and costs of each?
- Which options are of interest to you?
- Would you like to choose an option to act on?

→ resource-oriented questions, circular questions

## 5. Choosing Option(s) for Action *(choose questions appropriate to the respective situation)*

- What option or options do you choose?
- To what extent does this meet your objective(s)?
- What are your criteria and measurements for success?
- When precisely are you going to start and finish each action step?
- Which barriers might arise? How will you overcome them?
- Who needs to know what your plans are?
- What support do you need and from whom?
- What will you do to obtain that support and when?
- What could I do to support you?
- What commitment on a 1-to-10 scale do you have to taking these agreed actions?
  - What prevents this from being a 10?
  - What could you do or alter to raise this commitment closer to 10?
- Is there anything else you want to talk about now or are we finished?

Make sure that each action step towards reaching the goal has these four characteristics:

**Clarity:** I know exactly what to do

**Datebook:** This step can be scheduled at a specific time

**Commitment:** I know I will do this

**Deadline:** I've set a date for completion

## 6. Goals for the next Coaching-Call

- What can you accomplish before the next phone call?
  - Determine at least one measurable SMART goal

## 7. Task for the Next Phone Call

- Send an email of your summary discussion (like the template) to the participants and put Irina (irina.b@posteo.de) in Bcc
- Ask the participants to email you an agenda, specific questions or progress report (action steps they have taken to reach their goals) 1-2 days before your next phone call appointment
- decide who will protocol the next call

## 8. Feedback and Check-Out

- Feedback: it can be very helpful for the coach as well as the participants to give each other general feedback regarding the coaching process after 2 or 3 phone calls to make sure that things are moving in the right direction (how do you perceive the coaching in general?), one possible method to give/receive is the 5-finger-feedback:
  - **Thumbs-up:** That was great!
  - **Pointer finger:** I would like to point something out! - We could do this better!
  - **Middle finger:** This isn't working! – I did not like that!
  - **Ring finger:** I can use this in the future!
  - **Little finger:** This is not enough!
- What do you take home from this session?
- What are your concrete action steps to reach your goals?

Final Call



With the 4<sup>th</sup> phone call your coaching relationship ends (of course you can continue the coaching relationship if desired).

The **first part of the telephone call** will resemble a "regular telephone call". Meaning you will review everything that has happened since the last call and continue working on the current state of the project.

The **second part of the call** is to reflect the entire coaching process as well as the off-boarding of the coaching.

Once that is done, you will of course, celebrate that you all together completed the coaching sessions and advanced your skills and businesses :)

### 1. Check-In

- How are you doing?
- What do you wish to gain from this last session?
- What needs to happen in this session in order that you have the feeling the time was well spent?

### 2. Project Reflection

- How did you proceed in achieving your goal?
- What worked well?
- What did you notice?
- Have there been any challenges?
- If yes, what could be the reason it didn't work out as expected?
- Is it possible to remove obstacles?
- What could you have done differently or better?

### 3. Work on the Project at the End of the Coaching

- What is the status of your project at the end of the coaching session?  
→ Here, for example, you can use the scale question again:  
On a scale from 1–10 (1 is the time when you started your project, and 10 means that your project is successful) Where are you now? → What is the project team's evaluation → What needs to happen to reach the next step?
- What are the most important findings and challenges?  
→ Here, for example, you can apply perspectives and / or hypothetical questions:
  - I. Perspective: A good friend has this problem, what do you advise them?/ What would your partner/parents/grandmother tell you?
  - II. Hypothetical questions: Let's assume that/ Imagine that

### 4. Reflection of the entire coaching process

Looking back at project progress/retrospectively

- Has your business further developed like you thought it would? (If not, why?)
- What kind of successes have you experienced, which goals have you achieved?
- What type of challenges did you encounter?
- What did you learn?
- What are the most important insights when looking back?
- Has the vision/goal of your business changed?
- Is your business able to handle future challenges?

Questions about the coaching experience

- Did the coaching help you? If yes, how? If not, why?
- Were your expectations met?
- 5-finger-feedback on the overall coaching process: given by the participants as well as the coach (What were your impressions of the participants and the process and how do they feel about you and your methods?)

## 5. Goals in the Coming Weeks and Months

- What can you achieve in the next weeks and months?  
→ Come up with at least one SMART goal
- Regarding your participation in the Autumn School:  
→ What do you wish to gain from the Autumn School for your business?  
→ Which specific topic/goal/challenge do you want to address during the Autumn School?

## 6. Final Task

- Send a summary of your last call to the participants and Include Irina (irina.b@posteo.de) in this as well
- Write a short report for Irina as well as the other coaches. The report should definitely include lessons-learned from the coaching process and the development of the coached participants during the coaching period. Feel free to include other interesting aspects you want to share with your colleagues

## b. Template for Coaching Call Summaries

After each call, please send a summary of your coaching session to the participants as well as Irina (irina.b@posteo.de). You might use the following template to do so.

“Dear xy,

Here you will find a summary of our conversation from XX.

Agenda of the conversation:

1. List TOPs of the conversation
2. ...

We talked about this in the call:

1. How is the project progressing?
2. What are the most important findings and challenges?
3. ...

The following SMART goal(s) has/have been determined for the next call:

1. Determine at least one measurable SMART goal in the call
2. ...

At the beginning of our next call, we will discuss:

1. Short, precise points, to cover the current state of the project
2. Have the SMART goals been achieved? If yes, how?
3. ...

Questions that you should/could ask yourself in the near future:

...

Other important points:

...

Our next phone call will take place on:

...

Kind regards,  
Coach”

## Questioning Techniques

Questions are a powerful and essential tool in guiding the coaching process. They can be used to gain information, but also as a tool for interventions and to steer the perspective of the coachee in a certain direction. Different types of questions fit to different stages of the coaching process and/or needs of the coachee(s). In the following you'll find the most helpful and constructive questioning techniques:

### 1. Open Questions

While closed questions can be answered with a simple yes or no, open questions trigger the coachee to reflect and keep the dialogue in flow. Therefore, starting questions with the classic question words as “why”, “when”, “who”, “how”, “what”, “which” or “where” are crucial for a proper conversation.

Examples:

+ “Do you see any chance to convince XY?” → “Which options do you see to convince XY?”

+ “Could you imagine letting go of the habit XY?” → “What could you do to let go of the habit XY?”

+ “Have you already thought about asking XY directly about the issue?” → “How could you ask XY directly regarding the issue?”

Open questions can be problem-, resource- or solution-oriented.

#### 1.1. Problem-oriented Questions

These questions help the coach to get a better overview over the coachee's situation. They focus on problems and challenges the coachee has to deal with. But be careful and use them sparingly: Focusing too much on problems makes it harder to find solutions, since problem-oriented questions trigger negative emotions and thoughts.

Examples:

+ “How do you feel in this situation?”

+ “How did the problem evolve and who is part of the problem?”

+ “Since when is the problem existing?”

- + “What have you done so far to solve the problem? What worked well and what didn’t?”

## 1.2. Resource-oriented Questions

These questions focus on internal (personal strengths) or external resources (persons, settings or things), which might be helpful to solve a challenge.

Examples:

- + “What or who might be helpful in solving the issue?”
- + “What could you do to improve the situation?”
- + “Can you describe a situation in which the problem has been decreased or was completely gone?”
- + “What have you done differently in this situation?”

## 1.3. Solution-oriented Questions

These questions focus on the future, since the answers are linked to a time in which a problem has been solved hypothetically. The focus lies on a desired and possible future. The coachee gets the chance to experience the feeling of success, to identify obstacles and possibly

to gain new perspectives for the future through these questions. Hint: If coachees only come up with situations in which they don’t want to end up in future, use the word “instead” to change the mindset away from the problem (“What would you like to do instead?”). You don’t need to interrupt coachees if they are only talking about problems, but try to steer the conversation towards possible solutions.

Examples:

- + “Let’s suppose the problem has been solved: How would you notice that and what would be different? How would you act differently?”
- + “Let’s suppose the coaching session has been successful: What would be different for you? How would you notice that the coaching was successful? Who else would notice and how?”

Narrow the vision, goals and/or solution down by asking more detailed questions like “What do you exactly aim to achieve?”, “When do you aim to achieve it?”, “Which steps are needed to achieve it?”.

## Special Version: The Miracle Question

The miracle questions creates a hypothetical scenario, in which a certain problem has been solved overnight by a miracle. Since we are talking about a miracle, the coachee is free from any real life responsibility and is more free to think about solutions.

You could start with...

- + “I will now ask a tricky question which requires some imagination. Let’s suppose a miracle happens and the problem has been solved overnight. You wake up and the problem is gone.”

...and go on with questions like:

- + “What is different? What has changed?”
- + “Who is first noticing the change?”
- + “Do you behave differently and how? Is XY behaving differently?”
- + “How do you feel? What do you smell?”

Let the coachee explain the situation as detailed as possible.

## 2. Circular Questions

These questions aim to broaden the perspective of the coachee and help to see the complexity of a situation with all its effects and interdependencies. They invite the coachees to say something about themselves or a situation from the perspective of someone else. Adopting the perspective of someone else requires to empathize in the situation and mindset of another person. Using circular questions, the coach gets information on a certain situation, but also on the relationship of the coachee to other persons.

Examples:

- + “How would XY talk about this issue with others?”
- + “What would be XY’s advice for you?”
- + “If I would ask project partner/member XY what went well/wrong during the project – what would he\*she answer?”
- + “If you would be me, which question would you pose next?”

## 3. Scaling

To work with scales is a well-fitting addition to the miracle question and all other hypothetical questions types. Practically, the coach introduces an artificial scale between the problem and the goal/solution, which will help the coachee to assess already made progress and the distance from the aimed solution. “0” defines the state, in which the problem occurs (worst state), while “10” defines the situation on the day after the miracle (when the problem is completely solved). The coachee gets asked where on the scale he\*she sees him\*herself on the day of the coaching. Afterwards, the coachee gets asked to reflect on better or worse situations using the question techniques above. It is important that you leave the coachees enough space (timewise) to express their thoughts and reflect their feelings. Often, whole solutions for a problem emerge during that process.

Examples:

- + “On a scale between 0 (problem occurs) and 10 (problem is solved), how would you describe your current state?”
- + “Today you see yourself at 3. How do you behave at 3? How did you manage to get from 2 to 3?”
- + “How would you notice that you are at 4? What would be different? Would you behave differently and how?”
- + “What would help you to get to a 4?”
- + “What would you need to do to fall back to a 2?”
- + “What would a 5 (6, 7, 8,..) be like?”

## 4. Paradox Questions

Paradox questions are a provocative way of asking questions. They aim to hypothetically strengthen the problem and are especially useful in case of coaches, who can think of nothing but their problems. They irritate the coachee and can lead to a constructive counter-reaction. Anyway, if a coachee gets stuck in her\*his problems, you can use the positive questions types above to steer the direction towards a solution.

Examples:

- + “What would you need to do to strengthen your problem?”
- + “What would you need to do that your project members want to exclude you from the project?”
- + “How could you achieve that nobody ever hears about the great achievements of your project?”

# Goal Setting

Goals are in contrary to a wish, a hope or a vague vision concentration points we can use to orient our actions. Goals are optimally formulated when they're SMART. SMART stands for: specific, measurable, attainable, relevant and time-specific.

## 1. Specific

A goal should be specific, clear and precise.

- What exactly do you want to accomplish?
- What will it look like when you reach your objective?
- What makes this goal attractive for you?
- What would you have won for yourself and for your life?
- Which essential need would be satisfied?

## 2. Measurable

In order to indicate that a goal was achieved, a goal must be measurable. This is relatively straightforward for quantitative targets, it is more difficult to reach qualitative objectives.

- What is it I want to achieve precisely? (The more you go into details and include numbers and fact, the easier it will be controllable if you reached your goal)  
→ What do you want exactly? How would it look in detail? When, where, with whom, how often, how long?
- How could you recognize that you have achieved your goal?  
→ How would others (e.g. supervisors, opponents, good friends) recognize that you have achieved your goal?

## 3. Attainable

The objective should be relevant to the project and formulated in a way that it can be carried out.

- Is this goal achievable within your capacities? Is it reasonably possible?
- Does this goal depend on anyone else's choice or in your sphere of influence? How can we reframe it so it depends only on you?
- How could you personally take a step forward towards achieving the goal?
- In which way would you behave/work differently when the goal is achieved?

## 4. Relevant

A goal can only be achieved if you care enough about it to give it a high priority

- Why is it important to you? On a scale of one to ten, how important is it to you to reach this goal?
- What are you willing to let go of or cut from your schedule to work on this goal?
- Is the goal in line with your personal values and your self-perception?
- Is the goal in line with your superior goals/vision/values?

## 5. Time-Specific

Each goal needs a clear deadline in order to stay focused and see progress

- By when will you reach the goal?
- When will you start?
- What is your deadline?

# Feedback Methods

## 5-Finger-Feedback

- **Thumbs-up:** That was great!
- **Pointer finger:** I would like to point something out! - We could do this better!
- **Middle finger:** This isn't working! – I did not like that!
- **Ring finger:** I can use this in the future!
- **Little finger:** This is not enough!

## Top-Flop-Tip

- **Top:** What did I enjoy most? What worked well?
- **Flop:** What are you unhappy about?
- **Tip:** What could be further improved? How?

## List of references

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