



Unsplash: Jamie Templeton



ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

World Class Coaching
May 2022

ABA's Management Fundamentals Series

Understanding that arts leaders at every level may need to stretch their management muscles as they return to in-person interactions, ABA has developed a series of virtual, interactive sessions to tune-up member managerial and coaching skills.

Who Should Join?

Anyone in a management position (providing coaching, performance management and/or delegating work to others) at ABA member organizations is welcome to join. Sessions are capped at 35 participants. We will create multiple sessions if demand warrants.

What is the Time Commitment?

Each session is 2 hours. Sign up for all four or pick those most relevant to your situation.

SESSION 1:

UNDERSTANDING YOUR COMMUNICATION STYLE



Tuesday April 5 11:00 EDT/5:00 CEST

- Identify your communication style
- Understand your reaction to stress and how it affects your interactions
- Learn clues to others' styles and how to tailor your communication

SESSION 3:

COACHING FOR PERFORMANCE



Tuesday May 3 11:00 EDT/5:00 CEST

- Understand your role in coaching team members
- Learn how to deploy coaching to increase team performance and support staff development
- Practice key coaching skills

SESSION 2:

GETTING WORK DONE THROUGH OTHERS



Tuesday April 19 11:00 EDT/5:00 CEST

- Build your system for prioritizing work
- Understand your personal delegating style and how to adjust your approach for others
- Reflect on your leadership brand

SESSION 4:

MANAGING DIFFICULT CONVERSATIONS



Tuesday May 17 11:00 EDT/5:00 CEST

- Learn strategies for making difficult conversations (with team or your own manager) more productive
- Prepare for your own upcoming difficult conversations

Welcome Participants

- **Alberta Ballet:** Christiana Bennett, Jennifer Bishop, Julie Coleman, Dalma Czipott, Sarah Dick, Janis Galloway, Raven Hehr, Taryn Klassen, Aram Manukyan, Maria Marcon, Kelsey Miller, Debbie Nordstrom, Amy Packham, Leah Stewart, Wendy Winder
- **Arena Stage:** Maria Lee Lewis
- **Aspen Music Festival & School:** Lenor Leeds
- **Charlotte Ballet:** Yarina Conners
- **Chrysler Museum of Art:** Amber LoMele
- **Dallas Symphony Orchestra:** Kim Burgan
- **Ford's Theatre:** Andrew Buchsbaum
- **Joffrey Ballet:** Bradley Renner, Sarah Venuti Yates
- **La Jolla Playhouse:** Ryan Meisheid
- **La Jolla Music Society:** Ned Collins
- **Opera Omaha:** Jenny Daggett
- **Pasadena Playhouse:** Kory Kelly, Jenny Slattery, Rachyl Spacca
- **Philadelphia Orchestra:** Rebecca Kier
- **Pittsburgh Ballet Theatre:** Harris Ferris
- **Richmond Symphony:** Amy Buhrman, Ashley Moore
- **Santa Fe Opera:** Chelsea Antrim Dennis, Andrea Fellows Fineberg, Tim Hill, Elizabeth Kellogg, Heather Kemp, Emily Moore, Mike VanAartsen
- **Sarasota Opera:** Stephen Baker, Marco Nistico
- **The Old Globe:** Freedom Ballentine
- **The Wallis:** Christine Bernardi Weil, Rachel Kilroy, Jackie Meduga
- **The Washington Ballet:** Catherine Eby
- **Westport Country Playhouse:** Ivon Katherine Gonzalez Guerrero, Beth Huisling
- **Young Concert Artists:** Shannon Gibbons, Erol Gurol

Our Ground Rules

Contribution

Collaboration

Confidentiality

Reminder: Last Time



More strategic



More tactical

1. Your Leadership Brand Promise

What do you want to be known for?

Identifying activities that support and detract from your brand

2. Managing Your Time and Energy

Quarterly operating plan check-in

Taking action to manage your energy, not just your time

3. Getting Work Done Through Others

Urgency/impact matrix

Delegating/deleting something low on the matrix

What is *coaching* to you? What does a coach do?



Defining Coaching

Coaching is unlocking a person's potential to maximize their own performance through interactions of support and self-discovery

Coaching vs. Managing Performance

Coaching is ongoing improvement against skills

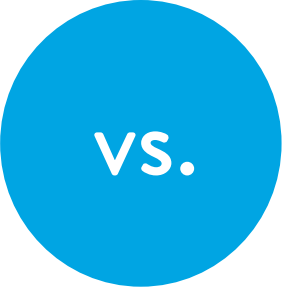
Performance management is a combination of regular performance reviews as required by the organization and interventions meant to raise performance to minimum role standards

	Coaching	Managing Performance
Orientation	Develop Current/Improve Future	Picture of the Past
Roles	Direct Report Self Discovery	Manager-Led Delivery
Method	Asks/Listens	Tells

It's (A Lot) About Mindset



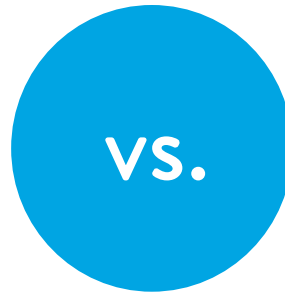
Understand Your Coaching Mindsets

Formal  Informal

Which approach do you think is more important for coaching and why?

Understand Your Coaching Mindsets

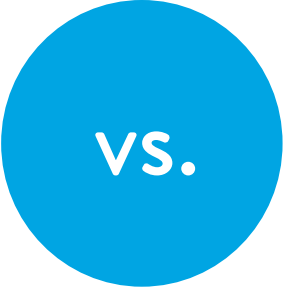
Current-



Future-Focused

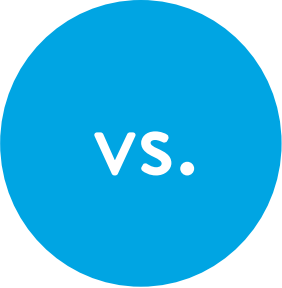
Which is better to focus on?

Understand Your Coaching Mindsets

Improvement-  Strengths-Focused

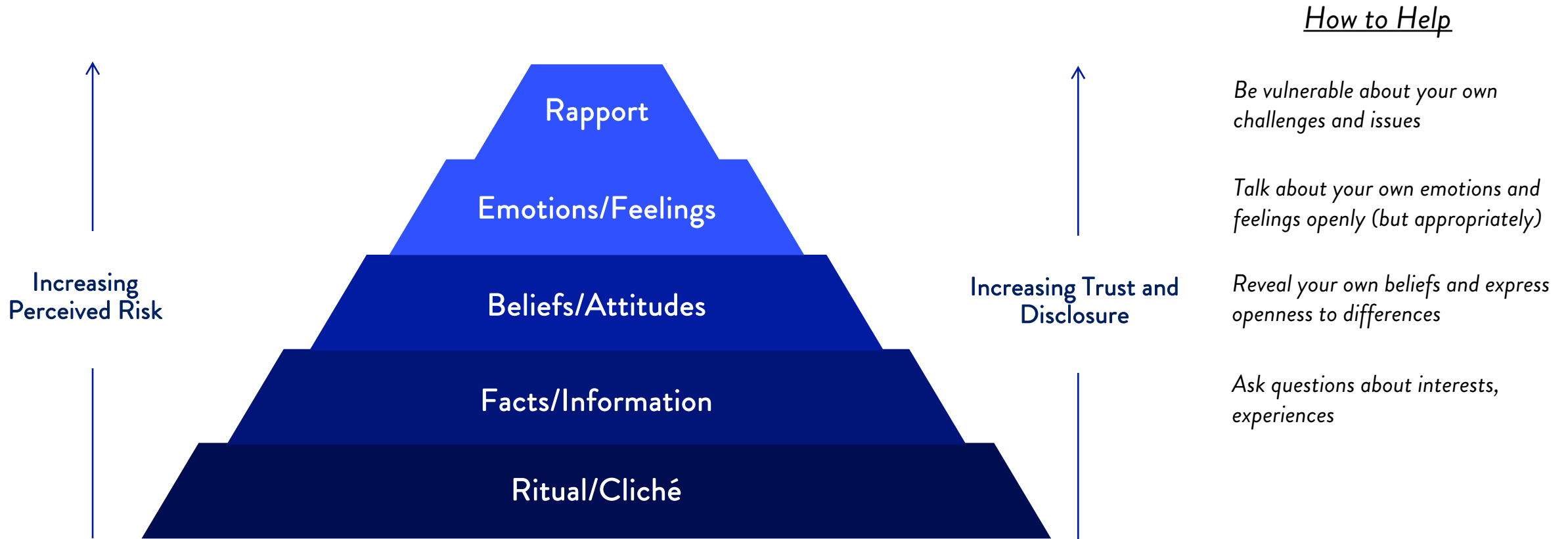
Which is better to focus on in selecting coaching areas?

Understand Your Coaching Mindsets

Ask  Tell

Which is the better approach for coaching?

Moving from Ritual to Rapport



Reviewing Mindsets and Relationships

My Typical Mindset	Best Practice	Anything to Improve?
Formal vs informal	Mix of formal sessions with informal feedback	
Current- vs future-focused	Depends on the team member	
Improvement- vs strengths-focused	Make sure to focus on both	
Ask vs tell	Much more asking than telling	

Team Member Name	Quality of Relationship (0=what relationship?, 3=average relationship, 5=strong relationship)	What actions could you take to further build the relationship?

What Is Great Coaching Behavior?

I had a great coaching experience
because my coach _____.

Good Coaching Means ...

Prepare

- Create a “safe” environment
- Customize to the individual
- Clarify coaching expectations

Engage

- Ask thought-provoking questions and listen
- Motivate toward outcomes


Provide Feedback

- Provide feedback based on observation

Let's Start...

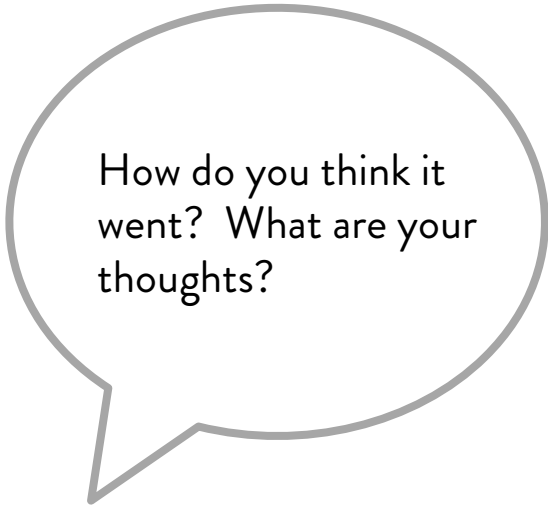


Prepare for Coaching




Thank you for having me observe your last meeting...

Engage in Coaching

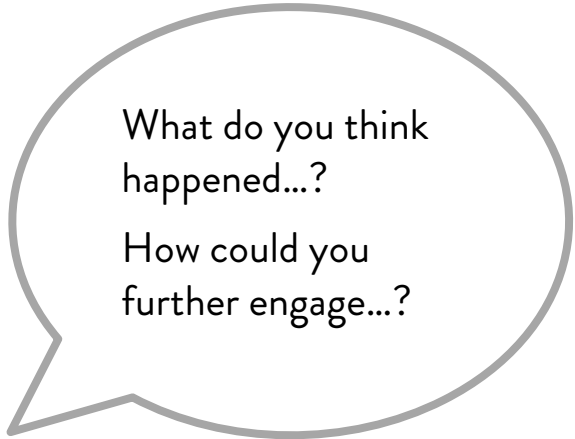


How do you think it went? What are your thoughts?



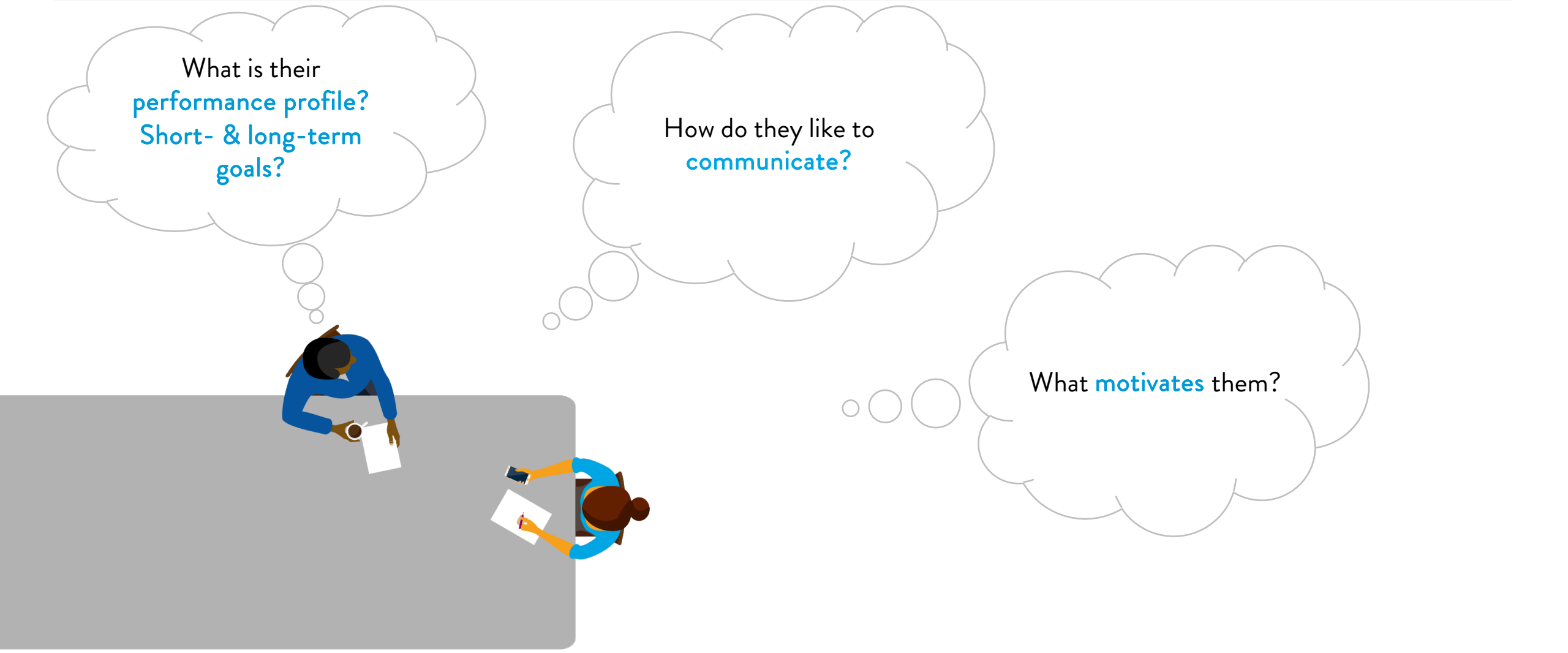
Can I share a few behaviors I thought you excelled at and two opportunities...?

Provide Feedback



What do you think happened...?
How could you further engage...?

Preparation: Performance Profile



What is their
performance profile?
Short- & long-term
goals?

How do they like to
communicate?

What **motivates** them?

Discuss Coaching Expectations

Let's talk about what coaching is and is not ...

Let's discuss the two to three skills we want to focus coaching efforts on ...

How can I best observe you demonstrating the skill?
What does success look like?



The Plan Starts the Coaching Process

Individual Development Plan

Name: Susie

Manager: Karen

Date Last Updated: Oct 7

Short-Term Career Goal: Full confidence in current role

Long-Term Career Goal: Larger role in production team

Objective	Action Steps	Manager Support	Measures of Success	Target Due Date
Improve pushback when people ask for leader time	<ul style="list-style-type: none"> Improve language/techniques Personalize approach to different stakeholders Work on voice and email tone to convey authority 	<ul style="list-style-type: none"> Review emails on regular basis for this Observe interactions and provide feedback Connect Susie to Joan who has good techniques here 	Fewer cases of issues being escalated to me	By end of November
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 		
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 		

Worksheet to Think Ahead

PREPARE	Name: _____	Name: _____
1. What is his/her profile?		
2. What are his/her communication preferences and implication for me?		
3. What motivates them?		
4. What performance opportunity should I focus on?		
5. What can I observe?		
6. How will I know coaching is working?		

Taking Action Worksheet

PREPARE	Name: _____Susie_____	Name: _____
1. What is his/her profile?	<ul style="list-style-type: none"> • In role for 2 years • Core performer – does a great job at the core responsibilities of the role • Good communicator, good time manager, strong attention to detail. Development opportunities: pushing back more based on the request/flex authority 	
2. What are his/her communication preferences and implication for me?	<ul style="list-style-type: none"> • Expressive • Tell stories, talk about human impact of what she does, discuss relationships and how they work • Praise her and what she is getting done well 	
3. What motivates them?	<ul style="list-style-type: none"> • Feeling like they are doing a good job 	
4. What performance opportunity should I focus on ?	<ul style="list-style-type: none"> • Help her assert herself in helpful ways with people she sees as more senior to her 	
5. What can I observe?	<ul style="list-style-type: none"> • Observe her in meetings and debrief afterwards on this topic. • Discuss written responses she gives and how she could position them more to assert her authority in a way that feels comfortable. 	
6. How will I know coaching is working?	<ul style="list-style-type: none"> • Fewer requests are escalated to me • I do not get complaints from others on the team about her pushing back too much (she doesn't go too far the other direction) 	

The Journey so Far...

Prepare

Thank you for having me observe your last meeting...

Engage

How do you think it went? What are your thoughts?

Provide Feedback







Can I share a few behaviors I thought you excelled at and two opportunities...?

What do you think happened...?
How could you further engage...?

What Makes For Good Questions?



1. Question Types for Coaching

	Question Type	Examples
	Investigative – These questions give you opportunity to understand the team member’s situation better.	What can you tell me about the situation? When did this happen? How long has this situation been happening for? What actions have you taken since the situation occurred? Who is involved? What is the effect on others?
	Drawing out – These questions aim to uncover any issues the team member may be having in their situation.	Can you tell me more about that? Can you share some of the details around that particular issue? What did you like most/least about that? How did that affect you?
	Catalytic – These are questions that help your team member see the challenge from a new perspective to help them find the best possible solution.	What other perspective can you have on this challenge? Have you ever thought about it this way? What do you think the other individual involved is thinking?
	Big picture – These are questions that help our team member see the overarching mission and core priorities	How will doing it this way help you achieve the overarching goal? How is this impacting the bottom line strategy? To what extent does this option meet all of your objectives?
	Strategic – These questions guide your team members to think strategically about a situation and come up with contingency options.	If x happens, what will you do to adjust? How else can you approach this situation so that you end up achieving your desired outcome? Who will you need support from, and what will you do if you can’t get it?
	Pre-emptive – These questions focus on potential obstacles that can arise in the future, and what the team member can do about them.	What challenges do you see for your situation down the road? What can you do now to prevent or avoid these obstacles? How can you make sure you’re prepared if these obstacles occur?

What questions would you ask?

1. A team member is preparing for the next level of complexity in the project for which she will be responsible

How are you preparing?
What challenges might you encounter?
How can we mitigate those challenges?
What skill will you need to rely on?
If X happened, what would you do?

2. A new team member joins your team and you want to learn about her

What environment do you work best in?
What do you see as your strengths and opportunities?
How do you think you will apply your strengths to your role?
How can I support you?
When have you felt most successful?

3. A longtime loyal team member lately seems disengaged

How are you feeling?
What makes you excited to come to work?
If we could change one thing about your work what would it be?
How can I help?

Is Paying Attention Really That Hard?



Observation and Debrief Template

Observation and Debrief Template

Name: Susie **Date:**
Nature of Interaction: Reviewing emails to help with pushback

Debrief: Feedback/Specify Prioritization

Strengths (Continue To Do)

- 1. The emails used very clear language
- 2. You were very timely in your response for all of them
- 3. You suggested alternatives

Areas for Focus

- 1. In some cases, you didn't make it clear the original option would not work, it sounded like you were just offering additional suggestions. In particular, your use of the phrases "would you consider" made it sound like these were options
- 2. Sometimes you gave too much information about why the original option would not work – encouraging the person to push back against those reasons

Manager:

I will review the next few emails on this topic and give feedback in 1 week's time

Coachee/Team member:

I will use some of the phrases we discussed – "I'm afraid that will not work for John"
I will review my emails for any phrases that make the options sound tentative

The journey so far...

Prepare

Thank you for having me observe your last meeting...

Engage

How do you think it went? What are your thoughts?

Provide Feedback

Can I share a few behaviors I thought you excelled at and two opportunities...?

What do you think happened...?
How could you further engage...?

What is ineffective about this feedback?

1. “The problem is you need to get a better understanding of donor interests in the meeting.”

2. “Overall you did great, I really like how you asked questions, just make sure the questions are more insightful.”

3. “There are a few things you need to work on. You can improve your rapport and ask more questions to understand the donor. Also, don’t forget to use silence. You could also do more research in advance of the meeting.”

4. “You lacked confidence talking to that donor. I can’t have you talk with donors alone unless this changes.”

F.A.I.R. Feedback

“Thanks for letting me observe you in the meeting today so I could provide guidance on your stakeholder management. I observed two key strengths and one key opportunity for improvement...”

“... the opportunity was to ask follow-up questions. You stopped him pretty quickly after asking your initial question and changed topics.”

“This meant we never really understood his objective.”

“Talk to me about that. What was going on there? What would you do differently? Was this feedback helpful?”

F

FRAME the message

Frame why you are providing the feedback. Prioritize the top strength and opportunity.

A

Describe the ACTIONS

Share what you observed—avoid assumptions and judgment.

I

Describe the IMPACT

Share the impact to highlight relevance.

R

Guide to RESULTS

Ask questions to understand the behavior and identify next steps.

Preparing Your Own FAIR Coaching Feedback

Think about feedback you need to give to a direct report or colleague. This is not a ‘difficult conversation’ but rather regular feedback to provide in a lower-stakes way. Prepare it using the “fair” model, below.

FAIR FEEDBACK	Example	Your Turn
<p>THE SITUATION as you’ve observed it, and one example</p>	<p><i>Joe tends to hurry through meetings and doesn’t give his clients enough of an opportunity to speak.</i></p>	
<p>FRAME the message Frame why you are providing the feedback. Prioritize the top strength and opportunity.</p>	<p>“Thanks for letting me observe you in the meeting today so I could provide guidance on your stakeholder management. I observed two key strengths and one key opportunity for improvement...”</p>	
<p>Describe the ACTIONS Share what you observed—avoid assumptions and judgment.</p>	<p>“... the opportunity was to ask follow-up questions. You stopped him pretty quickly after asking your initial question and changed topics.”</p>	
<p>Describe the IMPACT Share the impact to highlight relevance.</p>	<p>“This meant we never really understood his objective.”</p>	
<p>Guide to RESULTS Ask questions to understand the behavior and identify next steps.</p>	<p>“Talk to me about that. What was going on there? What would you do differently? Was this feedback helpful?”</p>	

In case you need some inspiration

You are teaching Joe how to write an annual appeal for fundraising. Below is his first draft, and he asked you to take a look at it and give him some feedback.

Dear [.....],

The Groovy Theater has been a bastion of artistic excellence for decades. Your support and engagement makes it all possible!

Join us again this year and give a tax-deductible, end-of-year donation.

As we look to 2023, Groovy is reimagining our work and diving into new forms and collaborations. We are thrilled to be featuring guest artist Joe Smith alongside Groovy Company Members A, B and C. This amazing cast will be led by Groovy playwright and Artistic Director, BCD and will work closely with In Waves to develop an experimental sound score that will be integrated into the set design and activated using movement sensors. Read more about all our artists and staff [here](#).

Launch us into 2023 with a gift of \$200.

Or make a bigger impact and consider setting a recurring donation of \$20 a month (\$240 annual)

With your support, we envision a year of groundbreaking new work and collaborations. Thank you, and we can't wait to share it all with you and catch up with you at our events and performances!

Until then, have a very happy and healthy New Year!

Cheers,
Groovy Theatre Company

Breakout Exercise

In groups of 3-4, bring your drafted feedback statement and get comments from others on what works and how to make it better. Each person should spend no more than 5 minutes. *Make sure to introduce yourselves at the start and provide context on your scenario.*

FAIR FEEDBACK	Example	Your Turn
THE SITUATION as you've observed it, and one example	<i>Joe tends to hurry through meetings and doesn't give his clients enough of an opportunity to speak.</i>	
FRAME the message Frame why you are providing the feedback. Prioritize the top strength and opportunity.	"Thanks for letting me observe you in the meeting today so I could provide guidance on your stakeholder management. I observed two key strengths and one key opportunity for improvement..."	
Describe the ACTIONS Share what you observed—avoid assumptions and judgment.	"... the opportunity was to ask follow-up questions. You stopped him pretty quickly after asking your initial question and changed topics."	
Describe the IMPACT Share the impact to highlight relevance.	"This meant we never really understood his objective."	
Guide to RESULTS Ask questions to understand the behavior and identify next steps.	"Talk to me about that. What was going on there? What would you do differently? Was this feedback helpful?"	

Don't Forget the Plan

Individual Development Plan

Name: Susie

Manager: Karen

Date Last Updated: Oct 7

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Next Steps

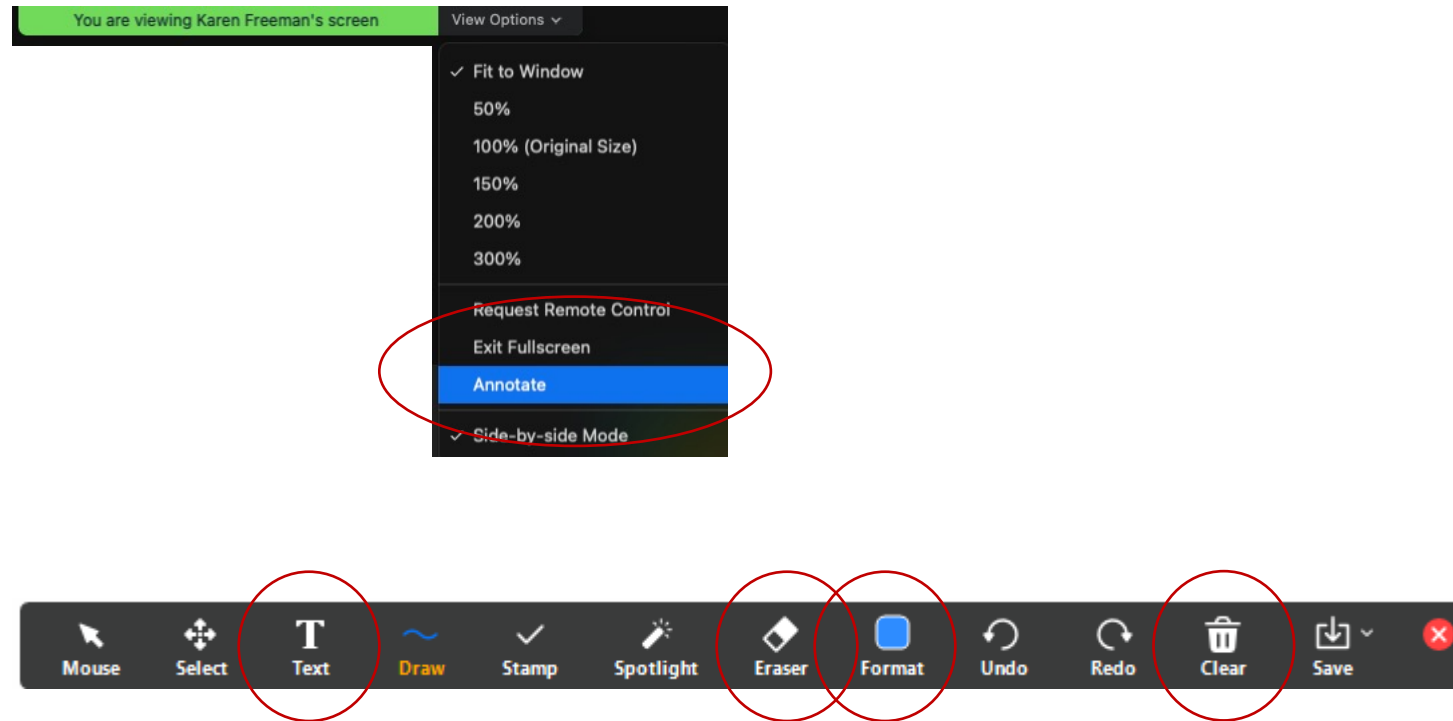
- Finish preparing to coach at least one team member
- Fill out the coaching plan with that team member
- Bring any questions or comments to our next session in two weeks
- Fill out our quick feedback survey

Coaching Virtually

When coaching from a distance, the need for an established communication routine is especially critical – ensure the lines of communication stay open and people feel comfortable bringing challenges or coaching needs to you.

- 1 Set Communication Protocols** – Written ground rules are more critical in virtual coaching than face-to-face to avoid misunderstanding and miscommunication. Establish when to use e-mail and when to videoconference, what is coaching and how it benefits the team, how much time should be devoted to coaching, who should contact whom, and how information should be shared.
- 2 Prepare For Each Meeting** – Preparation in advance of regularly scheduled conversations is crucial. Communicate an agenda and the required individual preparation before the session.
- 3 Customize Interaction Technique** – Calibrate coaching approach to the individual’s learning style.
- 4 Offer Undivided Attention** – When coaching over the phone, do not do other things at the same time. Remove all distractions and treat the conversation as seriously as you would a face-to-face meeting. People can tell when you are multitasking.
- 5 Maintain Awareness of Morale** – It may be harder to detect when you cannot easily view body language and nonverbal reactions indicating that someone is upset. Ask more questions to probe how they are doing and reacting to the feedback.
- 6 Use Coaching Documentation** – Provide substantive materials to the coachee in order to ground virtual conversations. Maintain a record of coaching progress by keeping all documentation (call agendas, coaching expectation charts, notes, and meeting planning), which can also be used to inform future coaching sessions.

In Preparation: How To Annotate



Let's try it: find a spot on the page and type "Hi"

Agree on Action Steps

All your team members should be able to articulate what they will do next and/or differently coming out of a coaching discussion.

