Coaching the Remote Employee

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Chapter 1 – Introduction

This book assumes certain things are in order. Before you can coach a remote (or any) employee, it assumes several things about you and the kind of work environment you've created.

- You are a person of character; you lead by example.
- You have created a positive culture that is openly communicative and cares about people as individuals.
- You have set clear work expectations for each employee.
- You provide the necessary tools and resources for growth and job performance.
- You address issues as they arise; you don't "sweep them under the rug."

If these assumptions are not mostly true for you and your work environment, then this book won't do much good. It will actually make things worse. This doesn't mean you've wasted your money. It just means you have a lot of work to do before you can use the following pages. Come back to this book after you have created and executed a plan to address the assumptions above. The plan should include input from your manager, your employees, your Human Resources specialist, and our book, *The New Supervisor's Coach*, which is available in paper and Kindle versions.

If the assumptions above are mostly true for you and your work environment, then you're ready to proceed with the rest of the book except for this caveat: the first assumption must be truer than all the others. You must be a person who leads by example, and when you fail, you must apologize to those who know you failed.

Chapter 2 – The Coaching Approach

Coaching is an approach to management in which supervisors help employees to achieve their goals by drawing out the best in them. It is a more collaborative relationship that emphasizes guidance and support. This kind of coaching is largely due to the shifting trend in management to empower and influence employees instead of directing their activities. Here's the bottom line: job performance is better when employees are guided and empowered rather than told what to do.

While it is a proven approach, there are times when coaching doesn't work or isn't appropriate. Some issues may just require feedback; coaching could be overkill. Also, not everyone responds to coaching, but that's rare. Some employees will only respond to the latter stages of corrective discipline. Even more rarely, termination is the only answer. As a rule, coaching works because you're working *with* the employee.

Nearly all performance issues fall into one of these five opportunities:

OJT (On-the-job training)

- Provide OJT when someone doesn't have a job skill.

Encouragement

- Provide encouragement when someone has a job skill, but needs reassurance.

Motivation

- Provide motivation when someone is meeting expectations, but could do better based on his/her education, experience, and ability.

Alignment

- Provide alignment when someone doesn't meet expectations from time to time.

Realignment

- Provide Realignment when someone is consistently not meeting expectations.

Here are some examples:

Coaching Opportunities	Performance Issue Examples
OJT: Provide OJT when someone doesn't have a job skill.	Kim doesn't know how to use Excel pivot tables.
Encouragement: Provide encouragement when someone has a job skill, but needs reassurance.	Tawana doesn't feel appreciated. Carlos is a remote employee (i.e., works in another location).
Motivation: Provide motivation when someone is meeting expectations, but could do better based on education, experience, and ability.	Jack is doing the minimum; it may be related to his retirement in three years.
Alignment: Provide alignment when someone doesn't meet expectations from time to time.	Don doesn't respect a younger supervisor. Jerry is Dr. Jekyll before probation and Mr. Hyde after probation.
Realignment: Provide Realignment when someone is consistently not meeting expectations.	Lorraine shows a lack of respect for others by doing mean-spirited things. Meredith has ongoing personal and family problems, which affects reliability and quality.

Let's focus on the opportunity that is the subject of this book:

Coaching Opportunity	Issue
Encouragement: Provide encouragement when someone has a job skill, but needs reassurance.	Carlos is a remote employee (works in another location) who may feel disconnected.

Carlos is a very good performer, but employees who work in remote locations can begin to feel left out. If ignored over time, Carlos' performance may suffer because he doesn't feel supported."

These feelings naturally occur because of the following challenges:

- Remote employees not "in the loop" on a daily basis.
- There is no direct MBWA (management by walking around).
- Lack of opportunity to build rapport with supervisor or each team member.
- Little if any interpersonal collaboration.
- Out of sight may lead to out of mind.

For these reasons, you believe Carlos needs the coaching approach called Encouragement.

Chapter 3 – Coaching Opportunity: Encouragement

Provide encouragement when someone has a job skill, but needs reassurance. The table below shows the general and specific steps to take when coaching an Encouragement situation. The next page provides an overview of these steps.

	Model Steps	Encouragement Steps
Before Coaching	1. Evaluate the situation	a. Observe behavior b. Match the situation with one of the five opportunities (see pages 4-5) c. Take notes on how you will approach the situation using the remaining steps as a guideline
Coaching	2. Describe the situation	a. Describe what you've observed/heard b. Encourage the employee to respond • If appropriate, share a time when you needed encouragement
	3. Plan a change	a. Share some encouraging words b. Help employee discover his/her own confidence by asking how he/she has dealt with a tough situation in the past • Encourage employee to share from his/her past experience c. Demonstrate your confidence in the employee's ability by keeping him/her on the task/project d. Offer support/resources to help
	4. Revisit the plan	a. Set a date b. Be supportive

Before we get to Carlos' specific Encouragement situation, it would help to provide an overview.

- Step 1 is done on your own before you meet with the employee. It's important to assume nothing about a situation. This step is all about ensuring that you understand the situation as best you can before you start coaching at Step 2.

- Step 2 begins the coaching session. This step is all about coming to a mutual understanding of the situation. You did your homework in Step 1, but there may be something you don't know or haven't considered from the employee's perspective. You have completed Step 2 when you both agree on the nature of the coaching opportunity.

- Step 3 is all about coming to a mutual agreement about what to do. You have completed Step 3 when you both agree on next steps to address the opportunity.

- Step 4 is all about follow-through. You have completed this step when you both agree when to meet for a progress report."

This approach has these benefits:

- Helps the talkative supervisor to stay on task and not get off on tangents.

- Helps new supervisors with assurance that they're coaching correctly.

- Helps the supervisor who avoids conflict to be assertive.

- Helps the impatient or brash supervisor to take a collaborative approach, listen, and help the employee feel supported.

On the next page, a Coaching Worksheet guides you through the four steps. Use the table on page 7 to complete the Coaching Worksheet for your particular employee. To see what this might look like, see the example on page 10.

Coaching Worksheet – How would you coach someone like Carlos?

1. Evaluate the situation

2. Describe the situation

3. Plan a change

4. Revisit the plan

Coaching Worksheet Example – Possible Coaching Results for Carlos

1. Evaluate the situation
   - He works out of his home in Sacramento by himself.
   - He comes down to San Diego once a month to touch base and attend one staff meeting out of four per month.
   - I don't think he experiences face-to-face synergy of the team.
   - How will Carlos observe me? I like to manage by walking around. How will Carlos see my style?
   - Teleconference is not a very good way to communicate with staff during meetings.

2. Describe the situation
   - "Carlos, I want to talk about how we can improve our working relationship."
   - "It seems that distance can make people feel disconnected. Technology helps, but we miss out so much when there's very little face-to-face communication. I'm concerned that you may feel disconnected from the team." (Pause; allow Carlos to respond.)

3. Plan a change
   - "You are a valuable part of this team. I don't want you to feel left out or want your outlook to be affected."
   - "Have you been in this situation before? What did you do to cope?"
   - "What can we take away from that experience to compensate for distance from the team?"
   - "If there are special resources we need to purchase, let me know so we can discuss them."

4. Revisit the plan
   - "Let's get back together so I can hear from you about how things are going. When is a good time for you in the next two weeks?"

If you both agree on the opportunity to improve the working relationship, step 3 should yield some encouraging action items. It's probably a good idea to follow up on the meeting before step 4 with an email that outlines the action items in priority order with due dates. This will further show that you are taking the remote employee's situation seriously, which will provide more encouragement.

It's always crucial for supervisors to do what they verbally committed to. For remote employees, it's even more important for supervisors to do action items by due dates because of the sensitive nature of the situation (i.e., the challenges listed earlier).

If possible, coaching should be done face-to-face. When that isn't possible, use the telephone, Skype, or hold a videoconference. Get out your Coaching Worksheet and use the tips below (Fisher, 180) for maximizing your remote coaching opportunity. Many of the following tips are phone-specific, but are applicable to any kind of communication that isn't face-to-face.
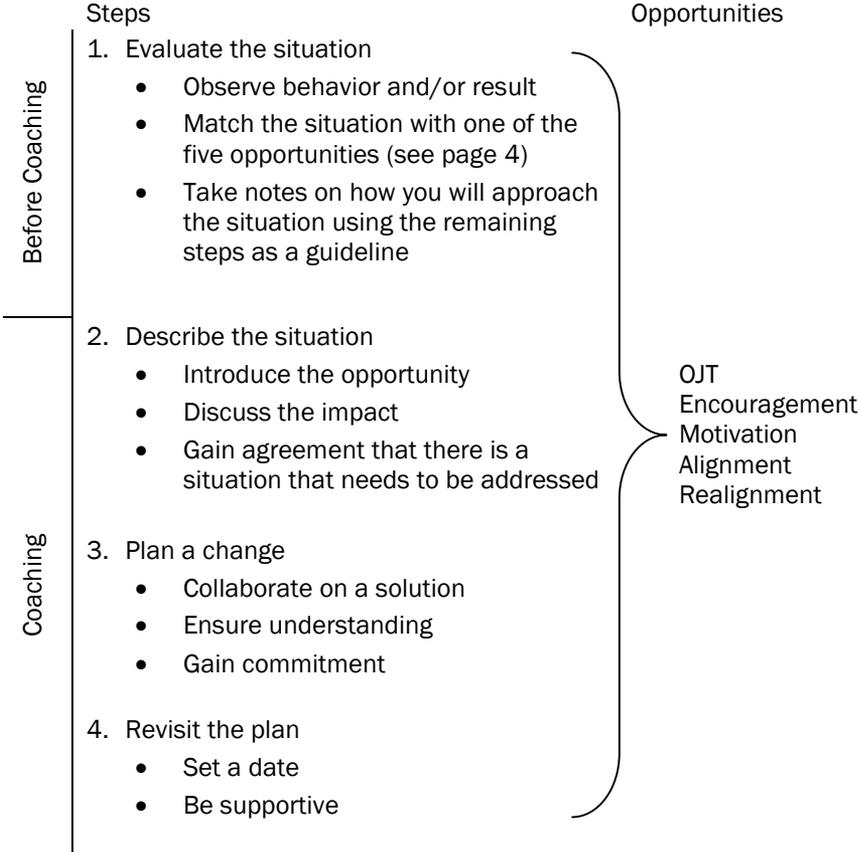
1. Be fully present; pay 100% attention to the phone (no email and no lunch).

2. Listen with eyes closed. Listen for tone, inflection, silence and pace of breathing.

3. Match your behavioral style to the style of the person. What is their style of communication? (DISC is one of many work-style assessments a supervisor can use.)

4. Don't worry about missing body language. It's true that body language can be a helpful tool, but if you strengthen your listening skills, you will be effective anyway.

5. Phone coaching requires asking more questions to check out where a person truly is.

6. Practice this high level of listening in all interactions, not just phone coaching. Practice when there is no pressure.

7. Have outstanding phone equipment and optimum surroundings. Use a good-quality head set if possible, and make sure that you are situated in a quiet, confidential space.

8. Have the person be comfortable and prepared. Have the person prepare by sending a brief written checklist on what you plan to discuss. Have the person include the issue they are facing and how they think you can help.

9. If a situation calls for corrective feedback, don't provide the coaching during the teleconference while a team member's peers are listening in. Follow-up individually after the call to provide the feedback and to have the coaching discussion.

10. Respond to subtleties and nuances. Supervising across miles demands constant vigilance on the part of the leader to watch for clues that will tell him or her when to step in and coach.

Most employees will respond very favorably to Encouragement coaching. For the few that may not, consider other coaching opportunities in *The New Supervisor's Coach*. Best wishes!

Appendix A

Job Aid: Situational Coaching Model

Steps   Opportunities

Before Coaching

1. Evaluate the situation
   - Observe behavior and/or result
   - Match the situation with one of the five opportunities (see page 4)
   - Take notes on how you will approach the situation using the remaining steps as a guideline

Coaching

2. Describe the situation
   - Introduce the opportunity
   - Discuss the impact
   - Gain agreement that there is a situation that needs to be addressed

3. Plan a change
   - Collaborate on a solution
   - Ensure understanding
   - Gain commitment

4. Revisit the plan
   - Set a date
   - Be supportive

OJT
Encouragement
Motivation
Alignment
Realignment

Appendix B

Job Aid: Coaching Worksheet

1. Evaluate the situation

2. Describe the situation

3. Plan a change

4. Revisit the plan

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About the Authors

Dennis Wade (dennis@ppldev.com) has been involved in private and public employee development for over 20 years in the greater Sacramento area. His experience in Human Resources Development, Information Technology, and Intel Corporation management prepared him to work with Robert Mondavi, Affymetrix, CalPERS, Caltrans, UC Davis Health System, RagingWire and other Northern California organizations in the areas of team development, customer service, management/leadership, and structured on-the-job training.

A graduate of UC Davis, he also has a master's degree in Human Resources and Organization Development from the University of San Francisco. He is certified in Bob Mager's Criterion Referenced Instruction, William Bridges' Transitions, Jeffrey Nelson's Expert OJT, and Achieve Global's Leadership for Results.

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Tyler Wade (tyler@ppldev.com) spent nine years in the "win-lose" world of California politics before moving on to the positive, collaborative, "win-win" world of workplace learning and performance.

His greatest thrill as a people developer is the "Aha! Moment"—that moment of clarity when some additional understanding, wisdom, or recognition brings learning home.

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