



360 Certified Coach Performance Checklist

In preparation and analysis of the report (estimated at 30-45 minutes once a process is found), prior to meeting with the Learner, we'd expect the Coach has:

- Read the entire report, and has their personal notes and possibly (optional) a BW placemat they have highlighted or noted cumulative information on - that they might be willing to share with a Learner in summary
- Identified the data gathering methodology used (on front cover)
- Reviewed the rater numbers and groups who returned the surveys – noted overall averages by group in their notes (biggest fan? toughest critic?)
- Determined range of scores for Roles and Practices (knowing a relative method provides a well distributed range, and Likert scale use may provide a tighter/less distributed range)
- Noted Role strengths in relation to the numbering (on Placemat A)
- Reviewed Practice Domain Coverage (generally) across 4 Domains (A, B, C, D on Placemat A) for patterns and themes
- Noted where the Learner self-perception and the aggregate of all other data is incongruent? Compared self-ratings (colored #s on Placemat Reports), as well as Hidden Strength and Blind Spot Reports
- Reviewed top and bottom ranked Practices to get a feel for patterns and themes
- Compared the Learner against normative data in the technical manual – knows the **Above** (what is differentiated), **Same** (where most are) and **Below** (low when others are middle/higher) the norm information... doing this in a list format can add to the coaching conversation
- Checked the Top 10 Practices (on Placemat C) and where they are in the Learner's data (Hs, Ms, Ls)
- Noted major differences in data by constituency group to highlight with Learner: checked for boss perspectives
- Read the entire comments section and is prepared to discuss all comments (positive and constructive)
- Identified a POV about development, is ready with a list of 5-7 things the Learner *might* work on based on the statistical rendering of the report – this includes the “what of development” discussed in class around including in a development plan: **strengths** and differentiators to keep – **middles** to elevate, and **lower** data to develop, and IDP formats (like a Tune up plan)
- Dropped a post it note/highlighted key (3-4) Practices in The Detail Report – as these might be informed fodder for discussion when delivering the detail reports for targeted conversation on things that matter (opposed to page-by-page coaching)
- Obtained a DIY (physical or digital) for the level used – has this resource handy to use during the coaching session



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	Section	Milestones	Might Sound Like...
1.	Opening	☐ Welcome ☐ Introductions - Preferences ☐ Time Agreement ☐ Coach Role / Background ☐ Purpose/Goal of Session ☐ Confidentiality of Session ☐ Report Ownership - Belongs to The Learner ☐ Evidence of Presession Analysis	• <i>Hello, I'm (insert name), and this is your 360-coaching session...</i> • <i>I believe I have you scheduled for XX/90 minutes, is that correct?</i> • <i>I am a certified Coach, and my role today will be to...</i> • <i>As a participant in our XXX cohort or group, the goal of our time is development...</i> • <i>I work for you today and my role here is different than how you may know me organizationally...</i> • <i>Our session is confidential, anything you say here is between us...</i> • <i>Your report is also confidential, belongs to you – and copies should not be distributed or retained for any other purpose than our development today...</i> • <i>You can share your report with anyone you like, as it belongs to you, but I might suggest the main deliverable is to share with others is the outcome from receiving this report, the growth and Development plans...</i> • <i>I've spent some time with your report, analyzing the meaning statistically – and I am happy to convey that POV in our discussion (share notes?) if that's helpful, however, what matters most is what resonates with you -the things you find meaningful...</i>

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2	Deliverables	☐ Take Notes – ☐ Possible Deliverable: Have a conversation with your boss/leader about development ☐ Possible Deliverable: Thank your raters in a short email; helps to create a feedback rich environment ☐ Likely Deliverable: Plan to create an IDP or Tune Up plan, and formalize that with project sponsor	• <i>There will be a few things to keep in mind as deliverables/things to accomplish in our session...</i> • <i>I'll ask that you take notes of things you're proud of, areas you've worked hard on, or skills that could use development. Know that at the end, I'll ask you, 'What did you learn'?</i> • <i>One deliverable post session might be to have a conversation with your direct manager in the form of "here's what I learned about myself..."</i> • <i>To ensure that the organization is more open to providing feedback – and your raters know you appreciate them taking the time to participate, you might send an email to that effect...</i>
3	Check-ins Throughout Session	☐ Check in to see how the participant is doing (anytime)	• <i>What else do I need to know about you before we proceed? (COVID, remote work, general engagement)</i> • <i>How does that sound?</i> • <i>How are you doing?</i> • <i>What questions do you have before I turn to another section?</i>
4	Future Positioning – Self Knowledge	☐ Previous 360 ☐ Self-Awareness ☐ Future Goals and Aspirations ☐ Brand in the Organization	• <i>Have you had 360 before?</i> • <i>(Or) What do you know about yourself – Strengths? Weaknesses?</i> • <i>What do you want for yourself in your career?</i> • <i>What am I coaching you to? (a different job, a promotion, a better relationship, a reputation, a stronger brand?)</i> • <i>How would you describe your brand?</i>

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5	Your Role	☐ Your Role (job) ☐ Length of time in Role – in organization ☐ Responsibilities your boss looks for most	• <i>Tell me about your job, position, or Role?</i> • <i>What are you responsible for on a daily basis?</i> • <i>Are you a good fit for your job?</i> • <i>What pressures do you feel in your job from a performance standpoint?</i>
6	The Report (copy itself)	☐ Receipt of report copy ☐ Discussion of best practice: The report belongs to Learner ☐ Self/User Experience ☐ This is Research-Based ☐ KSAs inherent to Industrial and Organizational psychology – Periodic Table of Elements ☐ Data Methodology (Relative? Likert? Range?) ☐ Highest Lowest - Development Opportunity ☐ Raters – Response Rates/data that stands alone ☐ Rater Group Selection -vet any trends or outliers here (see averages)	• <i>I sent your confidential report with not much time for you to spend with it – mindfully, so that I can walk you through it, help you navigate it, know what numbers mean, etc....</i> • <i>If the report is sent well ahead of time, many people just jump to the comments section which may/may not be helpful...</i> • <i>I am available via email if you have questions on the back end about any data points or meaning...</i> • <i>How did you find the report? Your experience rating yourself?</i> • <i>This 360 uses a research-based library of what is successful at the KSA X level – these are the things you were assessed against: we'll use the terms Roles and Practices, in a minute...</i> • <i>You may remember that the sorting method asked you to put a certain # of cards in a pile – so you expect to see full distribution of your data/ or describe tight range...</i> • <i>The tool will cut any statistical distribution into a depiction of what's highest for you, middle for you -</i>

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			<i>lowest for you – knowing everyone has a high, middle, and low from a development standpoint...</i> • <i>Are your raters people whose opinions you value?</i> • <i>Is there a rater group 'voice' that is most meaningful to you right now? Why?</i>
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In certification, we typically discuss being able to flow through the report any way the Coach prefers or fits their coaching style. A coaching delivery example discussed during certification is the sequence or separation in Roles information compared to Practices data/feedback. **This may impact a new Coach's delivery sequence.**
This checklist is how the fishbowl in the 360 specific class addressed delivery.

7	Roles Discussion (Placemat, Summary and Detail Reports for Roles)	☐ Definition of a Role ☐ Layout and depiction of the Roles data in Placemat Report ☐ Use of color/meaning brackets/underlines ☐ Your higher Roles show... ☐ Lower Roles show... ☐ Any surprises? ☐ Rank Order (Top and Bottom) ☐ Any surprises? Good news? ☐ # Coloration = self-data	• <i>I'd like to start by compartmentalizing and discussing your Role data – (and later we'll delve into the supporting behaviors around your Role called Practices) ...</i> • <i>A Role is a description of how the work gets done – what are you responsible for at your level...</i> • <i>This first report takes your data and shows it in relative highs, middles, and lows...greens unhighlighted and pink...</i> • <i>This is saying you're higher at.... lower at....</i> • <i>Do you agree? Anything surprise you?</i> • <i>Your rank order was...</i> • <i>Are you surprised to know your boss rated this low/high....?</i>
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			• <i>What questions do you have about Roles before we move on to Practices (the more detailed behavioral descriptions and KSAs)...</i>
8	Practices Discussion (Placemat)	☐ Definition of a Practice ☐ Layout and depiction of how Practices are organized by Domains on Placemat Report ☐ Use of color/meaning brackets/underlines ☐ Higher Practices show... ☐ Lower Practices show... ☐ Any surprises? ☐ # Coloration = self-data	• <i>Let's pivot to Practices...</i> • <i>A Practice includes, the KSAs, knowledge skills and attributes about how you show up to others...</i> • <i>This report takes your data and shows it in relative highs, middles, and lows...notice the green highlighting, unhighlighted and pink highlights...</i> • <i>This is saying you're higher at.... lower at....</i> • <i>Do you agree? Anything surprise you?</i> • <i>For definitions, I am happy to use my DIY and read some of the observables to see what parts of the observables resonates with you/don't resonate...</i> • <i>What questions do you have about Practices before we move on to the more detailed reports about these Practices...</i>
8.B	Additional Research in The Practices Context	☐ Comparison to norms -places Learner is differentiated, "You're high and most people are M or L ☐ Comparison to norms -places Learner is same as norm – H-H, L-L ☐ Comparison to norms -places Learner is below the norm L-H ☐ Top 10 Practices Overlay	• <i>Because this tool is science-based, I've taken the liberty of comparing you to normative data, what is typical for most people to know</i> • <i>To make this easy, let me read a short list and have you just react for a moment: this is a list where you are:</i> • <i>Above or better than the norm – you're high and most folks are lower...Feel proud? These strengths</i>

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		Note: It is not recommended to share and “teach” each placemat/job aid with data points to the Learner – instead keep handy if you need to reference – but generally say: “<i>Research tells us...</i>”	<i>differentiate you – next time someone asks you your brand you should mention these...</i> • <i>Same as norm – you’re where you should be, not going to celebrate these too much... they good and they should be good given your level and experience...</i> • <i>Below the norm – possibly a blinking development opp or pain point? Are these lower areas for you causing any noise for you? Wish they were better?</i> • <i>What would it mean for you if you got better at...?</i> • <i>Based on science we also know which practices are identified as Top 10: stronger Practices across all the Roles at your level...</i>
9	Practices Summary Report	☐ Orientation to Practice Summary Report -what do they see (#s alpha codes, rater groups, scoring, etc.) ☐ Self-scores (are not included in overall scores) ☐ Rank Order Top 5 ☐ Rank Order Bottom 5 ☐ Surprises? ☐ Comparison highlighting (Hs Ms Ls) across groups to generalize opinions	• <i>Since we’ve looked at previous reports with just highest and lowest in mind – let’s switch gears to scoring and rank order...</i> • <i>The rank order 1-X is based on your all others score, and doesn’t include your own self score – however those self-scores give us a nice point of comparison...</i> • <i>Rank order provides some meaning to how you show up to your raters overall.... Your #1 is, your last is X</i> • <i>Your rank order was...</i> • <i>Are you surprised to know your boss rated this low/high....?</i>

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			You'll notice highlights in each rater group's score for you that denotes if the score fell into the H, M, or L category for that constituency group...
10	Practices Detail Report	☐ Orientation to this Practice Detail Report – (#s alpha codes, bar graphs, rater groups, scoring, spread, etc.) ☐ Definition of Spread ☐ Discussion of a meaningful subset: 4-5 Practices that have a meaningful impact to the Learner, or possible development plans	- Let's dig deeper into the data and look at the detail report... - I've selected a few Practices that I think are most meaningful to look at/spend our time on... - Let's first look at one of your differentiating strengths to look at how to read this report... - You'll notice the orientation has changed to bar graphs... - The spread is color coded. Green (L) means little or no spread, raters see you the same. Red (H) means significant spread. Raters do not view you the same. - Since self-awareness is so important to overall life and work success, the first thing you might want to look at is how your self ratings compare with the ratings of everyone else... - Consider how aligned your ratings are with your Manager or Managers... - Look across your rater groups. Do you see agreement or differences? Different rater groups sometimes see things differently... - You'll notice definitions are included in this report...

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11	Hidden Strengths and Blind Spots Report	☐ Orientation to this HS/BS Report and meaning of terms ☐ Overall Hidden Strengths and any callouts by rater group ☐ Overall Blind Spots and any callouts by rater group ☐ Connection and reinforcement of data points to key messages already discussed	• <i>This next report is called the Hidden Strengths and Blind Spots Report...</i> • <i>Listed in order of largest to smallest gap between your scores and rater group scores, the Hidden Strengths and Blind Spots Report provides an important look at how you see yourself as compared to others' perceptions...</i> • <i>A Hidden Strength is where others report they think you are significantly good, and you think you are not...</i> • <i>A Blind Spot means that others experience you as significantly less skilled at this practice than you view yourself...</i> • <i>Where do you need to be more mindful?... (Enjoy the good news that you're better than you think -or reflect on the constructive news that others don't see you as skilled as you see yourself?)</i>
12	The Rater Comments Report	☐ Orientation of The Comments Section / where the comments came from ☐ Self-comments (italics) ☐ Best practices and guidelines ☐ The stop-start format, Special Practice call out commentary ☐ Comments that support the statistical rendering of the report	• <i>This next report is where your raters provided their own written feedback for you – actually typed this...</i> • <i>Your own comments are in italics...</i> • <i>I have read all the comments and would like to highlight a few that support what we've been discussing...</i> • <i>It's important to know these comments haven't been scrubbed for typos or grammar, etc.</i> • <i>It's never a good idea to attribute them to one person...or say I know who said that...</i>

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		☐ Check-in for understanding and well-being	• <i>Feedback is the gift that should help someone to: do things differently; change a habit or two; become more self-aware; or understand what they may need to change in order to be more successful...</i> • <i>Instead of going through them point by point – I'd like to offer you a general view and tenor of the comments – here's the positive tenor of what they said... here's the constructive... (summary of themes)</i> • <i>This is a good spot to pause – How you doing?</i>
13	Short Development Discussion / Assign next steps	☐ Transition from 360 report (what is so – to so what?) ☐ Learnings/Notes taken ☐ Alignment with coach suggestions - 5-7 things (good things to keep/middles to strengthen, real development lowers areas that will make a difference) ☐ What the Learner is willing to take action on ☐ Developmental Difficulty ☐ Revisit deliverables and who will request them ☐ Ongoing meetings / next steps	• <i>So, that's your 360...</i> • <i>How are you feeling? What did you learn?</i> • <i>What would make the most difference if you worked on them?</i> • <i>What would make the biggest impact on what you said we're coaching you to? (a different job, a promotion, a better relationship, a reputation, a stronger brand?)</i> • <i>Based on the statistical rendering of the report, some things jumped out at me as possible areas of attention...do you agree?</i> • <i>Research shows that some practices are harder to develop than others, let's ensure you have a good mix of easier or harder to develop...</i> • <i>Next up, you'll need to...</i>

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14	Closing	☐ Reinforcement of all ground rules (confidentiality – the session and report) ☐ Summarization - discussion / notes ☐ Direction around what to do with questions post session ☐ Report Copy / Coach to retain? ☐ Expression of confidence ☐ Expression of appreciation (for openness, vulnerability, and discussion) ☐ Close	• <i>What questions do you have?</i> • <i>Again – I'd like to remind you that our conversation is confidential, and your report belongs to you...</i> • <i>I am happy to share my placemat notes with you (scan) – optional...</i> • <i>Feel free to contact me via email if as you look at the report in detail you have any questions...</i> • <i>With your permission, I am happy to retain the report copy I used to prepare, or destroy it in accordance with global data privacy guidelines...</i> • <i>Reinforce if the Learner will be asked for an IDP or Tune Up plan by X date...</i> • <i>Thank you for your willingness to be open and discuss development...</i> • <i>I have great confidence that you can take this to the next level...</i> • <i>It was nice to meet you -and hear your story!</i>
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