# B

## References

Throughout the book we have referred to coaching objectives, coaching principles, coaching tech- niques, sample documents, templates, and books for further study. Here we have collected them all in one place for easy reference as you read, learn, and practice your craft. We’ve also included a

list of behaviors to do and avoid, a Professional Coaching starting reference for use when practicing coaching, and guidelines for sharing feedback and expertise.

### Our Coaching Principles

In these principles, the term *coachees* applies equally to individuals, groups, teams, and organizations. The principles are organized by the chapter in which they were introduced.

##### Chapter 1

* + People are self-sufficient. (See also Chapters 5 and 7.)
  + People have their own unique talents, experiences, values, beliefs, resources, and points of view. (See also Chapters 5 and 7.)
  + People have their own unique ways to solve problems and achieve goals. (See also Chapters 5 and 7.)
  + The coach should remain neutral and refrain from problem-solving, sharing their opinions, making evaluations, or providing advice.
  + Coachees should make their own choices, including the topic and flow of the conversation, and about what actions to take and when and how to take those actions. (See also Chapters 3 and 7.)
  + For people to gain new awareness of themselves, they need to look deeply within. Looking deeply within works best with mutual trust and safety.
  + When people are stuck, there is a reason they are stuck. Uncovering the reason can help them move forward on their own.
* Insights that arise in a coaching conversation represent an opportunity for people to learn and grow.
* The coach focuses on the coachees and the coaching process, supporting the coachees in working through whatever they bring to coaching.
* Orient toward the future. The coachee already knows the details of the situation. Help the coachee find new awareness, insights, and ideas.

##### Chapter 2

* The coach stays within the coachee’s expectations for the conversation. When in doubt, ask.
* Motivation is more important than planning. Planning is a way to assess motivation.
* We can coach only the people we are directly interacting with.

##### Chapter 3

* When offered without attachment, the coach’s observations can raise the coachee’s awareness and lead to insights.
* The coach and the coachees gain the most awareness when both are fully present in heart, mind, and body.

##### Chapter 4

* Professional Coaching provides more opportunity for coachees to learn and grow than offering expertise does.

##### Chapter 5

* What is best for coachees to do in a situation depends on their personal inventory.
* The coachee’s goals and expectations are the best sources of motivation and measures of progress.
* For a change to succeed, it must provide more value to the coachee than the status quo and justify the effort to make the change.

##### Chapter 6

* Your best coaching comes from bringing your whole self to coaching.
* Let the coachees do the work.

### Coaching Objectives

As a coach, keep the following objectives in mind at all times. Look for opportunities to achieve them throughout a coaching conversation.

* **Creating and maintaining high rapport.** Some of what the coachee needs to talk about may be of a personal nature and awkward to discuss. Rapport building creates an inviting and

supportive environment. It encourages the coachee to let down their guard and share what they need to share in order to explore what they need to explore.

* + **Identifying the session purpose.** Having a well-understood session purpose chosen by the coachee keeps the conversation focused, relevant, and action oriented. Although we will ask for this purpose at the start of a coaching conversation, we may not get it right away. Further, it may change during the conversation. A good session purpose is clear, with well-defined success criteria.
  + **Finding an associated goal.** The session purpose is always attached to one of the coachee’s goals, whether the association is clear to the coachee or not. Finding an associated goal is not a requirement of coaching, but referencing it (if known) can be highly motivating for the coachee.
  + **Reaching the aha moment.** This is the main objective of coaching. The assumption is that the coachee is stuck, but as soon as they have the aha moment they need to get unstuck, the next steps with timing will emerge.
  + **Pursuing forward motion.** We should pursue any next step that the coachee is motivated to move forward with. It doesn’t matter how soon it shows up. If it is premature, the coachee will let us know when they hesitate. Assess if a coaching conversation is complete by checking if the coachee has a plan for action that they are motivated to carry out and it includes specific steps and a well-defined time frame.
  + **Encouraging learning and growth.** Any aha moments that a coachee experiences, in addition to helping them get unstuck, can help them grow as a person and open up new possibilities in other areas of their work or personal life. Look for opportunities to help the coachee retain what they learn about themself or the situation, and start thinking about how to apply it in other areas.

### Behaviors to Do and Avoid

**Behaviors to Do**

* + Establish, monitor, and maintain rapport.
  + Establish, monitor, and maintain the session purpose.
  + Establish, monitor, and maintain the success criteria.
  + Determine the significance of the session purpose.
  + Ask the coachee if they know what is the main issue keeping them from figuring out a path forward.
  + Ask powerful questions.
* Establish, respect, and maintain coaching agreements as you coach.
* Give all choices to the coachee to make.
* Be present.
* Say as little as possible.
* Wait until you know what you are going to say before you say it.
* Remember to “absorb, consider, respond.”
* Notice the coachee’s words, tone, cadence, emotions, facial expression, body language, and other cues.
* Take the time you need to consider what you have absorbed from the coachee before responding.
* Monitor and manage your emotional, intellectual, and physical states.
* Incorporate the coachee’s words, tools, metaphors, and ways of referring to themself, others, and the situation whenever possible.
* When sharing expertise, offer the minimum viable amount of expertise and at the last responsible moment.
* When teaching or sharing expertise, return to Professional Coaching as soon as possible.
* Focus on the coachee in the session and what the coachee in the session can do.
* Before the end of the session, ideally just after the aha moment, ask the coachee how they will remember their insights.
* Before the end of the session, ideally just after the aha moment, ask the coachee how else they may apply their insights.
* Work toward specific next steps that the coachee themself will take within a definite time frame.
* Use the discussion of next steps and time frame to see if the coachee is really ready to move forward by looking for motivation, excitement, and resolve.
* Partner with the coachee to end the session when the coachee is ready to end it.
* Let your belief in the value of coaching show.
* Let your belief in the coachee’s self-sufficiency show.
* Let your belief that coaching is a partnership show.
* Let your enjoyment of being part of the coachee’s journey show.

### Behaviors to Avoid

* + Problem-solving
  + Interrupting, unless there is a coaching purpose
  + Getting distracted
  + Changing the topic
  + Judging
  + Criticizing
  + Evaluating
  + Discouraging
  + Speculating on the reasons for the coachee’s actions
  + Paraphrasing
  + Providing unsolicited opinions and advice
  + Becoming attached to a specific solution

### Professional Coaching Starting Reference

Think of this section as a quick reference for getting started with Professional Coaching. It is by no means a complete guide, and these are just a handful of potential questions to ask. The questions and prompts that follow represent a progression from establishing rapport to planning next steps. There are also a couple of general questions that can be useful at any point in a coaching conversa- tion. Use the questions as they are, add your own, or customize them.

Wherever a question or prompt uses the words *this*, *here*, or something similar, try to replace it with words that came directly from the coachee. For instance, instead of “What makes *this* top of mind for you right now?” try something like “What makes *speaking with the Product Owner* top of mind for you right now?”

#### Rapport Building

*“It’s nice to see you. How are you feeling today?” “Hello. What’s new with you?”*

#### Identify the Session Purpose

*“What would you like to discuss?”*

*“What’s top of mind for you at the moment?”*

*“Of the topics you’ve mentioned, which would you like to focus on?” “What would you like to accomplish in our time together?”*

#### Prioritization

*“What makes this something you need to address right now?” “What makes this top of mind for you right now?”*

*“What’s the benefit to you of moving forward on this?”*

#### Goal Identification

*“What would success look like for you in this situation?” “And what would you like to have happen?”*

#### Exploration

*“What’s keeping you from moving forward in this situation?” “What paths do you see for moving forward?”*

*“Who or what else could you leverage here?”*

*“Thinking of your heroes, what might one of them do in this situation?” “What would you do if you had a magic wand?”*

*“What can you apply here from similar situations in the past?”*

#### Planning

*“How do you feel about your various options for moving forward?” “What are you leaning toward doing?”*

*“What is your next step?” “When will you take that step?”*

#### General

*“What else?”*

*“How would you summarize that?”*

### Guidelines for Creating Powerful Questions

When we act as an expert, we need first to gather information. In contrast, when we coach, we keep the coachee focused on the session purpose and whatever is going on in their mind related to it. We aim for the coachee to focus their mental energy on thinking about the issue rather than explaining the issue to us.

To create the most powerful questions, look for questions that help the coachee figure out what issue(s) brought them to coaching in the first place. Then look for questions that help the coachee connect their issues to larger goals, discover paths to their goals, and uncover obstacles along those paths. Using powerful questions in this way will shift the coachee’s perspective, raise their aware- ness, and stimulate their creativity.

### Characteristics

* + **Coachee inspired.** The question is related to and ideally based on the coachee’s own words.
  + **Short.** The question is short and does not take the coachee off track from their thought process.
  + **Singular.** The question contains only one topic.
  + **Clear.** The question is easily understood.
  + **Action oriented.** There is an implicit or implied reference to the coachee taking action.
  + **Open.** There are many possible answers.
  + **Future facing**. The question is about the future, not about the history of the issue.
  + **Thought-provoking.** The question will likely make the coachee think for a bit before answering.

### Anti-patterns

* + **Closed questions.** Avoid questions that have a limited set of responses, such as yes or no.
  + **Leading questions.** Avoid questions where you are hoping for a particular answer.
  + **Thinking out loud.** Think through what you want to say or ask before you say or ask it.

### Additional Powerful Questions

Many of the powerful questions in this book are contained in either the Professional Coaching Starting Reference provided earlier or the coaching techniques listed later. The rest are collected here.

#### Identify the Session Purpose

*“How will you know that you have accomplished what you wanted today?”*

*“How will you know when you’ve gotten what you are hoping for out of our session?” “What would be good progress toward that goal in our time together today?”*

*“What do you suppose is the main issue here?”*

*“What’s keeping you from moving forward in this situation?”*

#### Prioritization

*“You mentioned a number of topics. What would you like to focus on?”*

#### Exploration

*“What are you considering doing?”*

*“What do you see as the next step in exploring this issue further?” “When you think about this situation, what keeps coming up?” “What is something you could try that you have not yet tried?” “What have you not yet explored about this situation?”*

*“Imagine a person who has achieved this goal. What comes to mind about how they achieved it?” “What could you do to figure out some new approaches here?”*

*“What do you suppose is keeping you from figuring this out?” “How might you be able to change the situation?”*

*“If someone came to you with this exact situation, what would you say to them?”*

#### Exploration—Personal Inventory

*“Which of your values can you tap into here?”*

*“Who are you when you conquer issues like this one?” “What skill can you lean into more on this?”*

*“What are your superpowers and how could you lean on them here?” “What might inspire you to think of a new direction here?”*

*“What would your future self do?”*

*“What does this tell you about who you are?”*

#### Intuition

*“What does your gut tell you about this?” “What does your heart say about this?” “What does your intuition tell you?”*

*“What does your inner voice say about this?” “When you let go of logic, what comes to mind?”*

#### Planning

*“What, if anything, do you need to keep yourself on track here?” “What might get in your way of achieving your next steps?”*

#### Learning and Growth

*“What did you learn during our conversation that you can apply going forward?” “What is it that you want to remember from our conversation?”*

*“What else came up during our conversation that you’d like to follow up on?” “Where else can you apply what you learned about yourself?”*

*“How else can you apply what you learned about the situation?”*

### Guidelines for Sharing Feedback and Expertise

Here is a summary of the guidelines we provided in Chapter 4.

**Self-serve.** Where possible, find ways to create a self-serve knowledge-sharing environment. Based on what you observe, offer lunch-and-learns and find other ways to provide information such that people can absorb what they find valuable on their own terms.

**Conversational.** By bringing up the topic in a conversation, you may find that the coachee is already aware of whatever you were thinking of sharing and possibly already working on incorporating it. Starting with a conversation on the topic, rather than immediately sharing feedback or expertise, is a good way first to understand the coachee’s perspective and then to build or keep rapport.

**Timely.** Share feedback or expertise immediately or shortly after whatever prompted it.

**With good intent.** Make sure your intent is to benefit the receiver.

**Opt-in.** Ask for permission and make sure the receiver’s words and body language continue to indicate permission as you share your feedback or expertise.

**Credible.** Ask yourself if the receiver sees you as either having a valuable perspective or being more knowledgeable on the topic.

**Minimal.** When sharing feedback, start with an observation. Move to comparing expectations only if the observation was not enough. Move to sharing expertise only if comparing expectations was not enough. When sharing expertise, start with a small piece of missing information, then a decision-making resource, then finally related experiences.

**Optional.** The key to successful sharing of feedback and expertise is to provide as much choice in the matter to the coachee as possible. Be careful only to share information, not to advocate. Leave the choice of what to do, how to do it, and when to do it up to the coachee.

**Safe.** Following all of the other guidelines is a good way to provide a safe environment. When shar- ing feedback or expertise, look for signs that the receiver is no longer interested or comfortable.

### Guidelines for Staying in the Coaching Mode as Much as Possible

Here is a summary of the guidelines we provided in Chapter 4.

**Resist the urge to share expertise.** The more you resist suggesting solutions, the more opportuni- ties your coachees will have to find solutions for themselves, learn, and grow.

**Educate others on the value of coaching.** It is easier to stay in the coaching mode when other people appreciate its value and understand the difference between coaching and sharing exper- tise. Get a head start by sharing a short description of coaching, doing coaching demos, and creating coaching agreements.

**Use redirecting.** Acknowledge the coachee’s request, explore while staying in the coaching mode, then make sure to include their original request when reiterating their potential next steps.

**Use highlighting.** Acknowledge the coachee’s request for your expertise, reiterate their choices, explore while staying in the coaching mode, then make sure to include their original request when reiterating their potential next steps.

**Use a coaching mindset.** Even when sharing expertise, do it with a coaching mindset, leaving the choice of next steps with the coachee.

### Example Descriptions of an Agile Coach and Professional Coaching

To help people understand what you do, consider proactively creating and sending out short edu- cational materials. We’ve created short descriptions of an Agile Coach and Professional Coaching as examples. These descriptions can also be helpful when crafting coaching agreements. Customize these materials or create your own from scratch to reflect whatever role you are in as you work toward bringing about greater levels of Agility in an organization.

### Example Description of an Agile Coach

An Agile Coach is a person who helps individuals, teams, and organizations increase their level of Agility through teaching, facilitation, sharing their expertise and experience, and through pure coaching (sometimes called Professional Coaching). Most Agile Coaches can provide basic training on at least one Agile framework (such as Scrum), and some provide a full spectrum of Agile-related training.

The coach uses facilitation when they are modeling the skills of an effective team facilitator, such as a Scrum Master. The coach also uses facilitation when designing and facilitating workshops custom- ized to the needs of those they are working with.

Most Agile Coaches have a variety of experiences from prior engagements that they can share and apply in new situations. This can be very helpful when organizations are exploring what will work best in their specific circumstances.

The description of Agile is contained in a mere 264 words in the Agile Manifesto. How complex could it be? The answer: very complex. Every organization runs into challenges with some of the mindset shifts involved in moving to an Agile way of working. As an example, moving from working on many projects simultaneously to working on as few as possible in an “all-hands-on-deck” fashion is much easier said than done. It requires projects to be prioritized across multiple stakeholders, with some stakeholders having to wait. Each organization is different; this is just an example.

Because there is no step-by-step way to implement Agile, and because of the mindset shifts that Agile entails, Agile Coaches wear their “coaching hat” as much as they can. With their coaching hat on, Agile Coaches leverage the knowledge, experience, and capabilities of the people in the orga- nization they are working with, inspiring them to apply what they learn about Agile to solve the problems specific to their organization in an Agile way.

A typical starting point for any Agile adoption is for the Agile Coach to ask open-ended questions such as “Independent of any consideration of Agile, what do you see as the issues holding the orga- nization back?” and a similar question regarding potential opportunities. Another typical question is “Based on what you know or have heard about Agile (if anything), what risks or impediments do you see, or what concerns do you have about moving toward an Agile way of working?”

### Example Description of Professional Coaching

Professional Coaching, sometimes called *pure coaching,* is a discipline that inspires others to come up with their own solutions, without providing any expertise related to the problem itself. It is simi- lar to facilitation, but without a prearranged goal and without an agenda.

In a typical day, we make many decisions and figure out solutions to problems as they arise. When we run into a problem we can’t solve immediately or decide to try something new, there are a num- ber of tactics we can employ to figure out our next steps, such as putting aside time to focus on the matter at hand, looking for ways to stimulate our imagination, and thinking of different perspectives to consider.

If we still can’t decide what to do and we become frustrated, we may reach out to another person. There are two ways that other people can help us. One is by providing new information that is rel- evant to our issue. The other way is by skillfully employing tactics such as helping us stay focused on the issue when our mind wanders, stimulating our imagination in an unexpected way, or helping us look at the issue from a different perspective.

In contrast, there are many behaviors that can dilute the value we receive from other people as we search for a way forward: interrupting the flow of our thinking, judging what we are saying, and providing unsolicited opinions and advice.

Usually, we need to interact with multiple people to get the help we need to figure things out. Also, who we reach out to depends on the kind of assistance we may need. Even after we get new infor- mation and perspectives from reaching out to others, we generally need to come up with the final solution tailored to our own capabilities and situation.

As it turns out, the skills and behaviors listed above (and many more) overlap almost exactly with the competencies that make up the discipline of Professional Coaching.

Professional Coaching is particularly well suited for Agile adoption. Agile adoption involves many changes in mindset, culture, process, and ways of working. As a result, people will get stuck more frequently than when they were working the old way. Professional Coaching can help people get unstuck and accelerate their transition to an Agile way of thinking and working.

As you are working on adopting Agile in your organization, you may find it useful to work with an Agilist who is trained in Professional Coaching. They can help you figure out on your own what will work best for you. And if you find that you need some Agile-related expertise as you are figuring it out, you can ask them for what you need. They will provide examples from their experience, which you can then consider how best to use or not use in your specific circumstances. Also, as soon as you have the specific knowledge you need, they will return to pure coaching until you need their expertise again.

A Professional Coaching conversation is different from a typical conversation. In Professional Coaching, the focus is on you, rather than on the problem itself. The assumption is that you have the information you need to solve the problem; you are just stuck at the moment and need to find the insight you need to proceed. Unlike expert problem-solving that answers questions such as “How does a Product Owner split large user stories to fit into a one-week Sprint?”

Professional Coaching addresses questions such as “I need to come up with a couple of ideas for how to convince the Product Owner that our team can’t realistically finish all of the user stories that they have asked for in this sprint.”

In Professional Coaching, you are leading the conversation and you are doing all of the problem- solving; the coach focuses on the coaching process. The coach takes care of things like time management and making sure the conversation is staying on track according to your expressed outcome for the conversation.

The coach shares observations about what you are bringing up in the conversation. They ask deep and insightful questions, called *powerful questions,* designed to increase your self-awareness or help you discover a shift in perspective about yourself, your circumstances, or others. They also assist you in coming up with ways to hold yourself accountable.

For issues related to work, it can feel unusual to have the focus be on you rather than on the prob- lem you are trying to solve. Because of the nature of a Professional Coaching conversation, it is important to have something called a *coaching agreement* in place prior to engaging in such a con- versation. The coaching agreement establishes the ground rules for the conversation. For instance, making it clear that you understand the nature of Professional Coaching and that whether to start or continue a Professional Coaching conversation is entirely up to you.

### Example Coaching Agreements—For Individuals, Teams, and Organizations

Most individuals are covered as part of the coaching agreement for their team or through in-the- moment coaching agreements. If you are providing coaching to an individual outside of a team context, consider creating an individual coaching agreement as outlined below. If you are offering individual coaching as part of a personal coaching service, take a look at example agreements pro- vided by the International Coaching Federation.

The examples that follow are for consideration in creating informal coaching agreements, not legal contracts. For legal contracts, consult a lawyer. Think of coaching agreements just as you would team working agreements or a definition of ready or done. Adjust the specific details to match your needs.

### Example Individual Coaching Agreement

* + The coach will ask for the purpose of any coaching interaction, provide both “pure” coaching and expertise as appropriate, use powerful questions, look for next steps with timing, and look for accountability.
  + At any time, the coachee may tell the coach what they are looking for from the coach: pure coaching or expertise.
* The primary goal of the coach will be to help the coachee improve, as measured by the organization’s Agile maturity model.
* The coachee will decide which areas of the Maturity Matrix to focus on.
* The coach will be available via email and Slack for questions and for one-on-one meetings.
* The coach will hold anything discussed as confidential.

### Example Team Coaching Agreement

* The team understands that the coach will ask for the purpose of any coaching interaction, provide both “pure” coaching and expertise as appropriate, use powerful questions, look for next steps with timing, and look for accountability.
* At any time, team members may tell the coach what they are looking for from the coach: pure coaching or expertise.
* The primary goal of the coach will be to help the team improve, as measured by the organiza- tion’s Agile maturity model.
* The team, Scrum Master, and coach will coassess the team’s current state and decide which areas of the Maturity Matrix to focus on.
* The coach will provide opt-in learning events on a regular basis, as requested by the team and at the coach’s discretion.
* The coach will be available to facilitate meetings at the team’s discretion.
* The coach will attend standups, sprint planning, and sprint reviews at the coach’s discretion.
* The team will invite the coach to retrospectives at their discretion.
* The coach will be available via email and Slack for questions and for one-on-one meetings.
* The coach or Scrum Master, at their mutual discretion, will train any new team members in Agile.
* On a monthly basis, the coach will facilitate a team tune-up event co-created by the coach, the Scrum Master, and all team members.
* There will be a coaching backlog managed in our work management tool that anyone can add requests to and the coach will be the Product Owner of.
* The coach will hold anything discussed with an individual or group confidential to that individual or group at the discretion of the individual or group.

### Example Organizational Coaching Agreement

* + The Agile Transformation Working Group (ATWG) understands that the coach will ask the pur- pose of any coaching interaction, provide both “pure” coaching and expertise as appropriate, use powerful questions, look for next steps with timing, and look for accountability.
  + At any time, team members may tell the coach what they are looking for from the coach: pure coaching or expertise.
  + At the start, the coach will accomplish the following at a pace to be set by the ATWG:
    - Initial discovery and recommendations for the ATWG
    - Leadership and transformation training for the ATWG, senior leadership, business stakeholders, and people managers
    - Scrum training for Scrum teams as they are formed
    - Train-the-trainer program to identify, train, and mentor Scrum Masters and Agile Coaches to train and work with the Scrum teams
  + When the ATWG is ready, they will request that the coach assist the ATWG in putting together an overall Agile rollout plan (primarily in the form of a transformation backlog), including design and/or selection of an Agile framework.
  + The primary goal of the coach will be to help the organization create and support Agile teams, as described by the organization’s Agile maturity model.
  + The coach will work with the ATWG to help the organization as a whole adapt to an Agile way of working.
  + The coach’s performance will be evaluated on a monthly basis by the ATWG, who will be moni- toring progress based on how the organization and teams are advancing at the organization and team levels, as described by the organization’s Agile maturity model.
  + The coach will act as the Scrum Master for the ATWG.
  + The coach will act as the coach for the organization’s Scrum Masters and Agile Coaches.
  + Communication between the coach and the ATWG and its individual members will be set on an ad hoc basis as needed.
  + Attendance by the coach at ATWG-related meetings will be set on an ad hoc basis as needed.
  + The coach will hold anything discussed with an individual or group confidential to that individual or group at the discretion of the individual or group.

### Example Service Offerings

One way to make people aware of what kinds of things you and your team can do is to provide a catalog of service offerings. A catalog of service offerings makes it easier for people to match their needs to what you and your team can do. Feel free to copy material directly from this document to create your own catalog of service offerings. Don’t forget to share it somewhere that is easily acces- sible and to let people know about it!

### Office Hours

Here are times that you can sign up or drop in for coaching in person or by video call. Consider office hours when you:

* Want to bounce some thoughts off of a coach
* Need some Agile advice
* Need help planning a new initiative
* Want to quickly learn about a particular Agile topic

### Meeting Facilitation

Get an Agile Coach to facilitate a standup, Sprint planning, Sprint review, or retrospective. See how to run an Agile meeting with even greater effectiveness. Also, learn new facilitation techniques.

Coaches are also available to facilitate meetings other than the typical Agile meetings. One example would be to help build bridges with other parts of the organization.

### Team Health Check

A combination of guided self-assessment and expert opinion to provide a set of recommended action items and suggested service offerings that the team can do on their own or with coaching support.

### Team Tune-Up

An intensive full-day workshop. The whole team and selected managers associated with team mem- bers go through activities specifically co-created for the team’s current circumstances. The goal is

to quickly achieve a higher-level Agile proficiency. Typical agenda items include product visioning, user story development and splitting, backlog grooming, and the creation of team agreements, such as a working agreement and definitions of ready and done.

### Scrum Introduction/Refresher

An overview and introduction to Scrum. Experience a series of hands-on activities to learn how Scrum works. Training can be anywhere from ten minutes to two days.

### Agile Simulations

Some concepts in Agile are counterintuitive and thus hard to communicate via a conversation or video. Agile simulations are a fun and effective way to impart Agile concepts and provide some team building at the same time. Simulations include the coin game, LEGO City, Heroes of Agility, and more!

### User Story Workshop

Learn how to deliver what’s valuable to the customer faster with effective user stories. Gain a deeper understanding of how to craft effective user stories through games and other activities. Learn tech- niques for how to split large user stories into smaller user stories. Work with the coach to rewrite user stories from your backlog.

### Introduction to Agile Transformation Workshop

A workshop for leaders to learn about transformation tools such as the Kotter and ADKAR change management models, transformation planning, and the importance of their ongoing involvement.

### Additional Ideas

Here are additional ideas for potential service offerings:

* + Product Visioning
  + Kanban Introduction/Refresher
  + How to Keep Your Retrospectives Fresh
  + How to Run an Effective Standup
  + Planning Poker and Story Points Refresher
  + Group Decision-Making Techniques
  + Minimum Viable Product Workshop
  + Product Owner Introduction/Refresher
  + Agile Release-Planning Workshop
* How to Be a Part-Time Scrum Master
* Facilitation and Coaching Workshop
* Open Space
* Scaling Agile Organically
* Agile for Leadership
* Business Agility Workshop
* A curated list of resources, such as book references and blogs, and a calendar of upcoming meetups and conferences (both internal and external)

### Coaching Techniques

Here is a summary of all of the coaching techniques for easy reference.

### Acknowledging

A coachee’s journey to achieving a goal typically includes obstacles and disappointments. Acknowledging progress can motivate the coachee to move past feelings of disappointment.

Acknowledgment can feel like praise. In a way, it is. It feels good to have one’s progress acknowl- edged. The difference is that praise can be given at any time for any reason. Acknowledging prog- ress works only when there is actual progress to refer to.

#### Questions

*“I know things didn’t work out the way you hoped. In what ways have your efforts so far moved the ball forward?”*

*“On the surface, that seems like good progress toward your goal. If that doesn’t count, what would?” “I’d like to acknowledge the work that you did to get to this point. What’s next?”*

In addition to the word *acknowledge,* consider *note* or *recognize*.

### Celebrating

There is something special about celebrating. We celebrate births, weddings, sports team wins, promotions, new jobs, anniversaries, and much more. A celebration reinforces our achievements, reminds us of our strengths and abilities, and may inspire us to start thinking about our next goal now instead of later.

Celebrating success paves the way for the coachee to pursue new goals, achieve more success, and become more of who they aspire to be.

#### Statements and Questions

*“You worked hard on that. It’s great to see your efforts pay off!” “And what will you do to celebrate?”*

### Challenging

To grow, we need to try what we haven’t tried before. As coaches, we can help coachees see how they may or may not be challenging themselves, help them find the level of challenge they want, and help them set goals to provide that level of challenge. Make sure the coachee sets the level of challenge, not you. Invite the coach to reflect on where they are and where they aspire to be.

When you sense that the coachee has not set goals for themself that are sufficiently challenging, based on what you know of their past accomplishments, their desired level of challenge, or the work they have done to improve their skills, consider using this coaching technique.

#### Questions

*“This goal seems less challenging than others you have chosen in the past. What are your thoughts?”*

*“You worked hard to get more proficient in that area, but it seems like you haven’t started setting more challenging goals yet. What’s holding you back?”*

### Depersonalizing

Just as it can be useful to help the coachee shift from bystander of a potential solution to active par- ticipant, it can also be helpful for the coachee to use the perspective of a bystander when exploring possibilities. When the coachee seems uncomfortable with some aspect of an issue, encourag-

ing them to consider the issue from a bystander’s perspective may help. It may be easier for the coachee to think about potential paths forward that *someone* could take without it necessarily being the coachee. Once there are paths forward that someone could take, then the coachee can look for ways to take an active role in the solution.

#### Questions

*“Regardless of who does it, what do you think needs to happen?”*

*“Regardless of who makes this happen, what’s the best time for it to happen?”*

### Determining Goals and Vision

As you are coaching, the coachee may express interest in exploring their goals. Here are some questions to help them explore:

#### Questions

*“What are your top goals?” “What’s your vision for yourself?”*

*“What’s your vision for life at work?”*

*“How might you reframe this issue into a goal to achieve?”*

In the context of a team, these questions can be adapted or replaced with powerful activities, as described in Chapter 7.

### Encouraging

Some challenges seem intimidating at first, making it difficult to know where to start. Even when the coachee is well on their way to achieving a goal, they may become discouraged by unforeseen difficulties. When this happens, a coach can help by providing a nudge of encouragement.

One way to provide encouragement is by helping the coachee connect their issue to an exciting goal. Other ways to provide encouragement include the following:

**Exploring.** Help the coachee to

* Discover new possibilities.
* Uncover obstacles and find ways to overcome them.
* Discover more options to achieve their goals.

**Planning.** Help the coachee to

* Articulate the benefits of achieving their goals.
* Connect their plan to their strengths, resources, and past accomplishments.
* Put together a plan they see as achievable.

##### Coaching

* Model patience and persistence to remind the coachee to be patient and persistent with themself.
* Avoid discouraging the coachee.
* Avoid judging or criticizing the coachee.

*Questions*

*“What were you thinking when you chose this path that you aren’t thinking now?” “What talents might you be overlooking here?”*

*“What past accomplishment does this remind you of?”*

*“What do you usually do when you don’t see how you can move forward?”*

### Highlighting

While requesting your opinion, coachees often express potential solutions in the request without recognizing them as such potential solutions. They may have a blind spot or perceive a constraint. This is a good opportunity to act as a mirror. If you are truly listening rather than trying to solve the coachee’s problem, you can more easily notice and highlight these potential solutions for the coachee to consider.

Here are some key phrases that indicate the coachee may be skipping over a potential solution or piece of the puzzle:

* + “What would you do?”
  + “I could do A or B, but what’s the right thing to do?”
  + “We can’t do X because we would need to do Y first.”

#### How to Apply

1. Notice that the coachee may be expressing potential solutions without recognizing them.
2. Acknowledge their request.
3. Mention the potential solutions that they mentioned.
4. Ask them a coaching question about those potential solutions. For example, “What’s keeping you from using one of the options you mentioned?”
5. Make sure the option of providing your opinion, as they originally requested, is still available to the coachee.

### Intuition

As long as you offer your intuition as an intuition rather than an assertion of fact, it is hard to go wrong. If your intuition is useful, then the coachee will incorporate it and move forward. If your intu- ition is not useful, very little time will have been wasted, and you can move on.

When you are coaching and your intuition provides you with insight, consider offering it in the following way:

#### Questions

*“Something just occurred to me. I’m not sure if it will help here or not . . .”*

*“A thought just popped into my head out of nowhere. I have a feeling it may help. See what you think . . .”*

*“While we’ve been talking, I think I may have had an insight, but I’m not sure. May I share it with you to see if it fits in with what we are discussing?”*

### Lightening

Although an upbeat and positive coaching environment isn’t always possible or appropriate, it is more likely to foster trust and openness on the part of the coachee. When the environment is heading toward negativity, look for ways to return to a more neutral or positive environment as appropriate.

### Notifying

The act of articulating what’s going on in the coachee’s heart or mind can uncover their feelings and thoughts about themself, other people, situations, and events. Sometimes the coachee isn’t aware of what’s going on inside until they say it out loud. By reflecting back what we are absorbing from the coachee, we can help them better understand themself, other people, situations, and events.

#### How to Apply

Look for the following indications that something may be significant:

* There is a change in emotion, tone, cadence of speech, or energy level.
* There is a difference between what is said and what is expressed in other ways.

Make sure to connect your observations to what they were saying. For instance: “When you started talking about taking that action, I noticed that you spoke more slowly and your smile went away. What’s happening there?”

### Orienting to Goals

We can help the coachee intentionally connect their current issue with their goals by asking questions such as these:

*“How does what we are discussing relate to your goals and vision?” “How does this fit into the big picture?”*

*“Where would you put this with respect to your longer-term priorities?”*

### Orienting to Session Purpose

In a coaching conversation, the goal is to keep the conversation focused on the session purpose. If the coachee goes off track, we want to help them get back on track. At the same time, we want to make sure they explore what they need to explore even if it isn’t clear to us how it connects to the session purpose.

#### How to Apply

1. You sense the coachee *may* be off track.
2. You check in with the coachee to see if they feel they are off track.
3. If the coachee feels off track, help them return to their session purpose.

#### Questions

*“How is this connected to <session purpose>?”*

*“What are your thoughts on where we are at right now?” “How would you describe the direction this is taking us?”*

### Personalizing

Sometimes the coachee removes themself from the situation, thinking of actions that others should take to effect change. They might say something like “Someone needs to talk to the Product Owner about making the user stories smaller.”

There are many reasons a person might remove themself from a situation. They may not see any possibility of their taking the action they see as necessary. They may feel uneasy taking the action. Or they may use the word *someone* but mean themself. In any case, a coach can coach only who- ever is present. If the coachee has removed themself from the situation, we need to find a way to help them shift their perspective back to themself.

Here are some ideas for nudging the focus back to the coachee:

#### Questions

*“I hear you saying ‘They ought to . . .’ What might be your role in making that happen?” “I heard you say ‘We should . . .’ What might be your part in that?”*

### Redirecting

When you receive a direct request to provide expertise or do some work the requester could do, such as “What do you think I should do?” or “Can you run the retrospective for my team?,” a skillful redirect can move the conversation to a coaching conversation.

The intention with redirecting is to provide the coachee with an opportunity to explore their situ- ation with coaching, not to dodge a request. If you are able to fulfill the request when they ask,

it should stay as an available option. If you are not able to fulfill the request, you should let them know that up front.

#### How to Apply

When you get a request, such as “Can you run the retrospective for me?”:

1. **Acknowledge the request.** In your response, include a reference to the request. For example: “I’d be happy to. I’ll just need to check my schedule.”
2. **Redirect to coaching.** Follow the acknowledgment with a coaching question, such as “What is happening that having me run the retrospective may help?”
3. **Circle back.** At the end of your coaching conversation, when discussing next steps, be sure to include the original request. For example: “We talked about having me run the retrospective, or someone on your team, or another Scrum Master who your team is already familiar with. What are you leaning toward?” Make sure that you aren’t saying or doing anything advocating for a particular outcome.

### Reevaluating

We create and use mental models to cope with the complexities of day-to-day life. We create mental models for a wide variety of things: ourselves, other people, concepts, how things work, and how we think about situations.

We use mental models to make our lives easier, but sometimes those models outlive their useful- ness. Other times we forget to update our mental model as the circumstances change.

When you sense that a mental model is hindering the coachee, ask the coachee to explore switch- ing mental models to see if that uncovers any new possibilities. Make sure it is the coachee suggesting alternative mental models, not you.

#### How to Apply

* 1. Notice a mental model that may need reevaluating.
  2. Bring the mental model to the coachee’s attention.
  3. Ask the coachee if there might be another mental model.
  4. Explore how the new mental model may help with the current topic.

#### Questions

*“How would you describe your perspective on this?” “What is a different perspective that you could take?” “What are some other perspectives on the situation?”*

*“Think of another person involved in this. What do you suppose their perspective might be?”*

### Reflection

Many new possibilities come from new perspectives and new behaviors. Changing our perspectives and considering a change of behavior require reflection. We have found that many people are not accustomed to pausing mid-conversation to take a few moments for reflection. Consequently, some coachees miss opportunities to gain new insights that enable their progress.

When a coachee responds with “I don’t know” or something similar, invite them to pause for reflec- tion. A little reflection in the moment may open up new possibilities or lead to more reflection later.

#### Question

*“No rush. Take a moment or two to reflect. What comes to mind?”*

### Reinterpreting

When the coachee describes a situation, they may include some interpretation of the situation along with facts. The interpretation may interfere with their ability to consider all possible actions. Raising the coachee’s awareness that their interpretation of the situation may not be the only inter- pretation may open up additional possibilities that they were not previously considering.

When you sense that the coachee’s interpretation of events is limiting them, consider asking, from a perspective of curiosity, “What other ways might you describe what happened?”

### Releasing

During a conversation with a coachee, you may notice that they are distracted, are having difficulty focusing on their stated session purpose, or keep wandering to a topic that seems unrelated to their session purpose.

Releasing gives the coachee the opportunity to release whatever is distracting them. The distraction may be something that is bothering them or something wonderful they can’t stop thinking about.

#### Questions

*“You seem a little distracted. What’s on your mind?” “Is there something you’d like to get off your chest?”*

### Repatterning

Routines and habits are patterns. In addition to routines and habits, there are many other kinds of patterns. Regularly scheduled events are patterns. There are patterns to how we behave in our relationships.

Some patterns positively influence our lives; others hold us back. Routines and habits can make it particularly difficult to make a change. Until we change the patterns associated with a change we want to make, they will impede our progress.

The first step to changing patterns is to be aware of existing ones. Here are some questions that may uncover patterns affecting the current situation.

#### Questions

*“What routines or habits do you have that might be a factor here?” “What are the circumstances surrounding this?”*

### Summarizing

When something is clear, it can be easily described. If you find the coachee is using a lot of detail to describe something and it’s not clear what they are saying, ask them to summarize. This can help both of you to determine if there is a need to explore the topic further or pivot to another coaching technique, such as orienting.

If you feel the coachee is stuck and you can offer a summary that is not an expression of your opinion, ask permission and then offer it. Make sure to offer your summary as a possibility, not something the coachee needs to accept.

#### Questions

*“How would you summarize that?”*

*“I think I’m losing the thread of this. Can you summarize it for me?” “Based on our discussion, what do you see as the central issue?” “At this point, how would you summarize the issue?”*

*“What’s your recap of what we’ve discussed?”*

*“In just a couple of sentences, how would you describe this?”*

*“I heard a number of details and topics. What do you see as the high-level topic or topics here?”*

### Recommended Resources

Books, websites, and other resources related to coaching that we recommend.

### Books

Adkins, Lyssa. *Coaching Agile Teams.* Addison-Wesley, 2010. Appelo, Jurgen. *Management 3.0*. Addison-Wesley, 2011. Bolton, Robert. *People Skills.* Touchstone, 1986.

Bradberry, Travis, and Jean Greaves. *Emotional Intelligence 2.0*. TalentSmart, 2009. Derby, Esther, and Diana Larsen. *Agile Retrospectives*. Pragmatic Bookshelf, 2006.

Goldvarg, Damian, Patricia Mathews, and Norma Perel. *Professional Coaching Competencies*. Executive College Press, 2019.

Goleman, Daniel. *Emotional Intelligence*. Bantam, 2005.

Kaner, Sam. *Facilitator’s Guide to Participatory Decision-Making*. Jossey-Bass, 2014. Larsen, Diana, and Ainsley Nies. *Liftoff*. Second edition. Pragmatic Bookshelf, 2016.

Lipmanowicz, Henri, and Keith McCandless. *The Surprising Power of Liberating Structures*. Liberating Structures Press, 2014.

*Mindfulness Made Simple*. Calistoga Press, 2014.

Owen, Harrison. *Open Space Technology: A User’s Guide.* Third edition. Berrett-Koehler Publishers, 2008. Rosenberg, Marshall B. *Nonviolent Communication*. PuddleDancer Press, 2015.

Stoltzfus, Tony. *Coaching Questions*. Coach22 Bookstore LLC, 2008.

Stone, Douglas, and Sheila Heen. *Thanks for the Feedback*. Penguin Books, 2014. Sullivan, Wendy, and Judy Rees. *Clean Language*. Crown House Publishing, 2008.

### Other Resources

The ICF’s assessment markers: https://coachfederation.org/pcc-markers

The IAC’s Coaching Masteries: https://certifiedcoach.org/certification-and-development/coaching-masteries/ Games, techniques, and approaches for facilitating retrospectives and teaching Agile: https://tastycupcakes.org A large collection of activities organized by the five stages of a retrospective: https://retromat.org