

What it is

Guidelines for a successful peer coaching partnership.

What it can do

This tool can assist you to:

- Establish and maintain a successful peer coaching relationship.
- Get what you need from your peer coach.
- Be the best coach you can be to your partner.

When to use it

- When you are entering into a peer coaching relationship.
- Before and during any session with your peer coach.

How it works

Read the overview to start your peer coaching off on the right track.

Learn about the role of the coach and tips for getting coached to get the most out of your peer coaching experience.

SET YOURSELVES UP FOR SUCCESS

1. Schedule a minimum of 45 minutes for one-way coaching. That is, each of you should receive a minimum of 45 minutes of coaching. You may choose to schedule your two sessions back-to-back or at different times.
2. We highly recommend that you set up coaching sessions at regular intervals, so that each of you receives coaching every two weeks, or at least every month. Some structure and predictability is helpful for people with busy schedules.
3. Both of you should be in a space free from distraction and interruption – one that supports deep reflection and being present with each other. Privacy is also important so you feel safe talking about any subject.
4. Coaching often happens over the phone, but if you happen to live or be in the same location, in-person can be an added treat. Skype or Google Hangouts can be a nice middle ground.
5. The roles of “coach” and “person being coached” should be clearly delineated. It should be explicit when you are switching roles. In other words, it’s not simply a conversation.
6. For the coaching to work, it’s absolutely essential that you both feel space to discuss anything and everything. Don’t just assume confidentiality — discuss your expectations and what confidentiality means to you both at the beginning of your peer coaching.
7. It’s a good idea to think in advance about what you want to work on with your peer coach. Try filling out the [Lifestyle Satisfaction Index](#) and/or the [Personal Change Plan](#) to help you focus on the change you want to make. Both tools are available at atctools.org.

THE FIRST SESSION

1. Affirm and discuss the ground rule of confidentiality.
2. Share expectations:
 - Overall, what do you hope to get out of peer coaching?
 - Preferences for being coached: what tends to work for each of you and what doesn’t?
3. Discuss logistics: frequency, timing of calls, etc.
4. Schedule several sessions. Setting up appointments can be one of the greatest challenges to successful peer coaching. Schedule a number in advance. Don’t leave the first call without doing this.
5. Identify any goals or major things you would like to be working on over the course of the peer coaching.

IMPROVING YOUR COACHING

Coaching is a critical leadership skill. Apart from the direct value received by you and your “client,” peer coaching is a great opportunity to practice and improve your skill as coaches.

At the end of your sessions, take a few minutes to evaluate how things went and what you can each learn to improve your coaching:

- **Clients:** give feedback to your coaches about what was most helpful, and what was less helpful.
- **Coaches:** talk about your experience as coach, what worked, and explore areas for improvement next session.

THE ROLE OF THE COACH

1. Most importantly: Take your job seriously. Coaching is a sacred role. Bring your best to each session.
2. Be present. This can be more challenging over the phone. It's much easier to get distracted. And much harder to pick up the non-verbal cues we use to tune into people. A few tips:
 - Review this tool prior to the call.
 - Consider sometimes using Skype or its equivalent so you can actually see each other.
 - When you're phone coaching, it can be helpful to close your eyes. This helps focus all your attention on the person's voice . . . and even the feeling and energy behind their words.
3. Your most important job is deep listening. Do some reflecting back of what you hear. The seemingly simple act of paraphrasing and summarizing really helps people sort out their own thinking.
4. Remember that you're not supposed to be the expert who fixes people with your brilliant advice. Your job is to help your client access their inner wisdom and capacity, so that they not only solve a particular problem, but grow in confidence and ability to meet their own challenges.
5. Make sure you're not taking more responsibility for the session than the client and that you're not more invested in solving things than they are.

Here are some tips:

- Make sure your client is talking significantly more than you are.
- Support your client in keeping focused on getting the outcomes they wanted for this session. You can ask questions like:
 - Are we on track for getting what you need?
 - What else do you need to feel complete?
 - What else would be helpful?
- Keep the focus on the client. Avoid talking about yourself, similar experiences you have had, etc.

- Avoid the mechanical pattern, where you ask a question, they give a short answer, you ask another question...a short answer...and so on

6. Even though your most important job is to be present and deeply listen, your role can also be active. Be courageous in offering feedback to your client. Be willing to challenge their assumptions or the way they're going about things.
7. Help the client find useful and new frames to think about their situations. Offer reframes lightly, to see if they're helpful:
"Might it be useful to think of it this way?"
8. Rather than factual questions designed primarily to help you understand the client's situation, ask transformational questions that invite the client to discover new perspectives.

Some examples:

- What else could this mean?
- What potential positive value might there be in this?
- What is the opportunity here?
- How *could* you make this work?
- If you *had* to do this, how would you make it work?

9. Actively help the client stay focused on meeting their goals.
10. Be careful in offering advice.
 - Do you really want the responsibility of telling someone what to do?
(We don't have to live the consequences of another's choices. They do!)
 - Building commitment to live out choices may be as important as making the decision. Taking someone's advice usually generates less commitment than struggling through to one's own decision.
 - Are you *really* wise enough to know what's best?
11. Having said this, there are times where it's fine to offer an opinion:
 - When the client asks for your opinion. Just be clear that's only your opinion.
 - When you have specific knowledge or information that the other does not.
For example: knowledge about funder priorities, options for structuring meetings, tools for organizing, etc. – i.e. When someone asks you, "*How do I use this new software?*" don't respond with, "*I hear you saying you want me to help you use the software.*"
12. Actively help your client focus on the outcomes they want for the session.
 - Help refocus them when they wander off on tangents.
 - Track time for them and see where they need to focus in order to achieve their desired outcome.
13. Be a reality check for your client. Make sure you believe they're setting themselves up for success rather than failure. Small steps and little wins can be more valuable than unachievable goals that erode confidence.

TIPS FOR GETTING COACHED

1. Prepare for the session. Come having already thought about what you want to get out of the session. Review this tool prior to the call and have it handy during. Also consider using the **POP Model** (Purpose, Outcomes, Process) – how can you get the most value out of this time?
2. There are no limits on what you can work on with your peer coach:
 - challenges in your work life
 - challenges in your personal life
 - help planning a particular meeting or event
 - preparing for a courageous conversation
 - help in harvesting lessons from something that didn't go well
 - actually . . . anything
3. Sessions Over Time
While you can get value out of taking each coaching session as an isolated event, there is great value in establishing some ongoing goals for your coaching. The goals might be around:
 - moving some particular work forward
 - developing particular leadership attributes
 - practicing and developing particular skills
 - team or organizational goals
 - making shifts in the way you work
 - changes in your personal life
 - etc.

You can use your coaching sessions to help keep you accountable, get support and feedback, and track your progress over time.

4. Some of your peer coaching will be about gaining support for challenges and opportunities that arise between your sessions. It can also be valuable to use the coaching, in an intentional and proactive way, to make positive changes in your life. Use the **Personal Change Plan** to help focus the changes you wish to make.
5. To repeat: Prepare for the session.
Taking even a few minutes beforehand to get clear on how you want to make use of the time is the single most important thing you can do to get value from your peer coaching.
6. Last tip: Take charge of the sessions.
It is your responsibility to get the value you need.

GET THE MOST OUT OF PEER COACHING

1. Be prepared! Whether you are acting as the coach or the “client,” take your role seriously and give it some thought in advance.
2. Clients: take charge of the coaching. If you’re not getting what you need, take responsibility. Raise your questions, concerns, and dissatisfactions with your coach. Work together to keep improving the quality of the experience.
3. Maintain regularity of contact. If your coach is being unavailable or not keeping their appointments, have a [Courageous Conversation](#).
4. In between your formal meetings, it’s nice to sometimes check in on each other via e-mail or phone . . . especially if you know something important or difficult is up for your partner. Offer them your support.
5. A challenge you may possibly have to confront:

What if the peer coaching really isn’t working? What if I had courageous conversations and really tried to make it work, but I’m just not getting value out of the coaching?

Consider dealing directly with the situation. Your peer coaching needs to be a place where you can be authentic. Step up to it!

However, life is short and there’s a lot to do. . . If it’s really not working, have another courageous conversation: end the peer coaching early, learn what there is to learn, and try again with a different partner.

ENJOY YOUR PEER COACHING!

It is a great blessing to have someone in your life who’s there for you, someone who is also an experienced peer with whom it’s safe to talk about things you can’t with others.

Bring your best to this relationship so that you can reap the full benefits of this opportunity.