

COACHING CONVERSATION PLANNER

Purpose

Prepare for effective development discussions that unlock insights and inspire action.

Instructions

Use this worksheet before coaching conversations to increase their effectiveness.

Part 1: Conversation Context

Person being coached: _____

Date/time of conversation: _____

Current situation overview:

Previous coaching topics or commitments:

Part 2: Conversation Framing

Coaching Purpose

What's the primary purpose of this conversation? (Check all that apply)

- ☐ Exploring options for a specific challenge
- ☐ Building self-awareness
- ☐ Developing new capabilities
- ☐ Overcoming obstacles
- ☐ Creating accountability

- ☐ Celebrating and reflecting on success
- ☐ Other: _____

Why is this the right focus right now?

Desired Outcomes

What specific outcomes would make this conversation successful?

For the person being coached:

For you as the coach:

Coaching Stance

What coaching approach would be most helpful? (Check primary approach)

- ☐ Directive - Providing guidance and advice
- ☐ Non-directive - Asking questions that promote self-discovery
- ☐ Instructional - Teaching specific skills or approaches
- ☐ Reflective - Creating space for processing experiences
- ☐ Challenging - Pushing beyond comfort zones
- ☐ Supportive - Building confidence and reinforcing strengths
- ☐ Blended approach: _____

Why is this approach most appropriate for this situation?

Part 3: Powerful Questions

Prepare thought-provoking questions to use during the conversation:

Exploration Questions

To understand the situation more deeply:

1. _____
2. _____
3. _____

Perspective-Shifting Questions

To see the situation from new angles:

1. _____
2. _____
3. _____

Action-Oriented Questions

To move toward solutions:

1. _____
2. _____
3. _____

Commitment Questions

To solidify next steps:

1. _____
2. _____
3. _____

Part 4: Potential Obstacles

Conversation Roadblocks

What might prevent this from being a productive conversation?

Potential defensiveness or resistance:

How you'll address this if it arises:

Potential distractions or tangents:

How you'll maintain focus if needed:

What might be challenging for you in this conversation?

Personal triggers or biases to be aware of:

Tendencies to manage (e.g., talking too much, solving problems for them):

How you'll address these challenges:

Part 5: Conversation Structure

Opening (5-10 minutes)

How you'll set the stage:

How you'll establish or reinforce psychological safety:

How you'll clarify purpose and desired outcomes:

Exploration (10-20 minutes)

Key areas to explore:

Listening focus (what to pay particular attention to):

Development (15-25 minutes)

Potential insights to help develop:

Resources or experiences to potentially share:

Action Planning (5-10 minutes)

How you'll help translate insights to actions:

Accountability approaches to consider:

Closing (5 minutes)

How you'll summarize key takeaways:

How you'll confirm next steps:

Part 6: Follow-up Plan

How and when you'll check on progress:

What resources or support you'll provide:

How you'll help remove obstacles:

Part 7: Post-Conversation Reflection

Complete after the coaching conversation:

What went well in the conversation?

What could have made it more effective?

What did you learn that will help in future coaching?

Next steps based on the conversation:

Additional Context:

Effective coaching conversations:

- **Balance challenge and support** - Push thinking while maintaining psychological safety
- **Focus on discovery, not delivery** - Help people find their own answers rather than giving them yours
- **Listen more than you speak** - The person being coached should do the majority of the talking
- **Ask questions that create insight** - "What's another way to look at this?" vs. "Have you considered doing X?"
- **Attend to energy shifts** - Notice when engagement increases or decreases during the conversation
- **Respect autonomy** - Offer perspectives but honor the other person's right to choose their path
- **End with clarity** - Ensure shared understanding of insights gained and actions planned

Remember that the most powerful coaching doesn't just solve the immediate problem but builds the person's capability to handle similar challenges in the future.

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