Coaching Workout
What is Coaching and the Basics?

Microsystem Pre-Festival
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Anette Nilsson
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10:15-11:30

Health Care Improvement

• Well intended front line improvement teams
• Well intended faculty, teachers, programs, organizations
• Lots of resources spent (time & money)
• Conflict between patient care time and improvement time
• Frustrated front line staff
• Confusion in goals and clear path forward
• Unsupportive leadership
How Might Coaching Help?

What coaching behaviors might be helpful?

The Discipline of Coaching

"…Building relationships among people who are continuously learning about the changing environments in which they live and work, intervening in and moving to set aside ineffective and counter-productive habits, to build new skills, practices, habits, and platforms for collaborating in this ever changing world."
Helping & Humble Inquiry

One of the giants in organizational psychology, organization development, organizational culture and career development.

“Telling makes people feel inferior and reduces communication and organizational effectiveness suffers.”

Help, Helper, Helping

- Consciously trying to help someone else to accomplish something
- Understanding is needed for the helper to know when to offer help and what would be helpful if asked for help.
- Dynamics of helping relationships
  - Trust
  - What helper must do to ensure that help is provided
  - What any recipient must do to facilitate the process
- Helping
  - Underlies cooperation, collaboration and many forms of altruistic behavior.
Edgar Schein

“Humble inquiry is based on interest and curiosity and wanting to be caring. It is an attitude”

Health care improvement is not “Plug & Play”

- **Developing improvement capability** at the frontlines of care requires more than technical knowledge.
- **Essential support of frontline staff** to practice improvement, reflect and learn can benefit from team coaching for cultural transformation.
- The **Team Coaching Model can be adapted** and utilized in your improvement efforts to develop sustainable improvement capabilities in your organization.
Schein

- The helping relationship begins to build because of the interest the helper conveys through humble inquiry.
- Must equilibrate the relationship and not be “one up”
- Must “save face” with respectful communications
- “If you can find the place where the others are and begin there, then you can perhaps have the good fortune of leading them to the place where you are”

Team Coaching Model

**Pre-Phase**
*Get ready*
“Meet them where they are”

- **Context**
  - Review of past improvement efforts and lessons learned
  - Preliminary system review—Micro/Meso/Macro
- **Site Visit**
- **Resources**
- **Logistics**
- **Expectations**
  - Clarity of aim
  - Leadership & Team discussions about roles and logistics

**Action Phase**
*Art & Science of Coaching*

- **Relationships**
  - Helping
  - Keep on track
- **Communication**
  - Virtual
  - Face-to-Face
  - Available & accessible
  - Timely
- **Encouragement**
- **Clarifying**
  - Improvement Knowledge
  - Expectations
- **Feedback**
- **Reframing**
  - Different perspectives
  - Possibility
  - Group dynamics—new skills
- **Improvement Technical Skills**
  - Teaching

**Transition Phase**
*Reflection, Celebration & Renew*

- **Reflection**
  - On improvement journey
  - What to keep doing or not do again
  - Review measured results and gains
  - Assess team capability and coaching needs & create coaching transition plan
- **Celebration! Renew and re-energize** for next improvement focus
- **Evaluate coaching**

Godfrey, MM (2013)
Team Coaching Framework Over Time
Pre-Phase, Action Phase, Transition Phase

Pre-Phase
Transition Phase
Action Phase

Godfrey, MM (2012)

Pre-Phase
“Getting Ready”
“Meeting Them Where They Are”

- Set expectations ✔
  - Leader of coach
  - Coach of Leader
  - Coach + Leader of Team
- Leadership discussions ✔
- Clarity of aim ✔
- Prior improvement experience ✔
- Preliminary system review: Micro/Meso/Macro ✔
- Logistics (Time) ✔
- Resources (Data) ✔
- Site Visit
## Pre Phase List

**Team Coaching Model**  
**Pre Phase Actions**  
"Meeting them where they’re at!"

<table>
<thead>
<tr>
<th>Actions</th>
<th>Current Status</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Meet with microsystem leader (listen &amp; set expectations). What do they worry about? What is on their mind for improvement?</td>
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<tr>
<td>2. Discuss overview of the team coaching intervention and areas of improvement</td>
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<td>3. Review post improvement experiences – what went well, what was difficult. Any lessons learned? Any improvement still occurring?</td>
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<tr>
<td>4. Discuss regular time for leader to meet with you (brief huddle weekly, telephone call, email). How and when does the leader wish to stay connected with the improvement progress? (Your expectation of the leader. What is the leader expectation of you doing team coaching?)</td>
<td></td>
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</tr>
<tr>
<td>5. Review systems within systems: Microsystems, microsystem, macrosystem. (Drug charts, people connections and relationships)</td>
<td></td>
<td></td>
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</tbody>
</table>

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## Coaching Improvement without Leadership

*is like “Sisyphus rolling a boulder up a hill..”*
Coaching and Leadership

Organizational Leaders at all Levels

- **Help cultivate improvement capability** by designing structures, processes and outcomes of their organizational systems to support health care improvement activities
- **Set clear improvement expectations** of all staff
- **Develop the improvement knowledge of every staff member** in the microsystem to know their operational processes and system to promote action learning in their daily work
- Support improvement actions and learning using a **Team Coaching Model**
Knowing When
The Dichotomy of Action

• Push vs Pull
• Ask vs Tell
• On Stage vs Back Stage
• Watch vs Show

• Hands On vs Hands Off
• Listen vs Talk
• ? Others

Connecting
Teams, Coaching and Leadership

Teams & Coaches

Leadership

- Expectations
- SPs/Performance
- PDSA
- Sustain

- Regular meetings
- Provide time & space
- Anticipate & assist with data
- Rapid Tests of change with measures
- Inspire, Know & Tell Stories

Anticipate & assist with data
Rapid Tests of change with measures
Inspire, Know & Tell Stories
Behavior is very *situational*...

So change the *situation*

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The Imbalance of Art & Science

*Socio-Cultural*  
*Personal*  
*Experiences*  
*“Humanistic”*

*Mechanistic/Technocratic Focus*

Where is leadership in the different levels of an organization? How are they cultivating the conditions for success?
Go where no path exists and leave traces...

6 messages

- Develop coaching skills is about understanding yourself
- Understand other peoples way of being
- Be where the game come to take place not wait for standby
- Put yourself in the right position - release your full potential
- The way I use the "Team coaching model" and how it can be used in a big scale program.
- Create learning moments during your working journey
"Seeing" from 3 perspectives

Will give
Your inner landscape becomes visible
Understand what people see

"We don't see things as they are, we see things as we are"
Be where the game come to take place not wait for standby

IMAGINATION is more important than knowledge.
—Albert Einstein
Put yourself in the right position release your full potential

- Work with different persons in different context – develop yourself
- Expose yourself to be outside your comfortable zone
- See possibilities - creating conditions
- Have fun!

Team Coaching Model
(förberedelsefas, genomförande, överlämnande)

The Art and Science of Coaching
Interdisciplinary Health Care Professionals in Improvement

Ref: Marjorie M. Godfrey, PhD, MS, BSN, FANN
## Team Coaching Model

<table>
<thead>
<tr>
<th>Förarbete/förberedelsefas</th>
<th>Genomförande fas</th>
<th>Övergång/överlämnande fas</th>
</tr>
</thead>
</table>
| **Tydlighet i mål och syfte** | Aktiv coaching:  
- Förväntningar  
- Fortsatt förtydligande av mål/syfte  
  Vara på rätt spår!  
- Skapa förutsättningar för allt att bidraga och utvecklas under arbetets gång.  
- Uppmuntran |
| Samtal med närmsta chef – vad förväntas uppnås?  
  systemförståelse |  
  Förväntningar  
  Resurser |
| **Förväntningar** | - Synliggör flera olika perspektiv  
- Vara tillgänglig |
| **Resurser** | - Snabb återkoppling  
- Tydligt process fokus |

*Genomgång och reflektion av resan:*

- Vad ska fortsätta att göra?  
- Vad ska inte göras igen?  
- Utvärdera värdet av att ha en coach och vad som kan utvecklas mer i denna roll.  
- Reflektion, firande  
  - Skapa ny energi för nästa fokus*

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**Ref:** Marjorie M. Godfrey, PhD, MS, BSN  
Instructor in The Dartmouth Institute and in Community & Family Medicine  
Co-Director The Dartmouth Institute Microsystem Academy

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**I can grow old in security and retain my independence with access to good health and social care.**

- Swedish Association of Local Authorities and Regions and the Swedish government – agreement  
  **Better life for frail elderly**  
  Nationwide effort
- Large scale change of the health and social care system
- Coordinated care for 300 000 persons
The practice of leadership - from word to action

- National management program
- Building leadership teams from Primary Care Clinics, Hospitals and Social Care organisations
- Cooperation and integration to reach the goals
- Exchange of experience
- Results
https://www.youtube.com/watch?v=7ZShPCy_SHk

Design for spread from the beginning

How do we create the conditions for dissemination so it is not just “best practice” – Equal treatment & care
1) What is your problem?
2) Personalize concept
3) Implement for ALL

Show me the number - Feedback systems

Svedem
"Svedem ingår som en naturlig del i arbetet på några VC i linae"

Brytspunktsamtal
"Brytspunktsamtal gäller försöksområdet som ett del av det ordinarie arbetet"

Läkemedelsprocess
"Brytspunktsamtal gäller försöksområdet som ett del av det ordinarie arbetet"

SEP
"Genomförs ibland men inte alltid vid ca 1/3 av de relevanta arbetet som är ledningsstyckar"

BPSD
"Inget hittes av SÄBO i linae-registern, men det görs inte regelbundet upp-följningar"

Senior alert
"Senior alert"
What do we earn on the new ways of working? Alternatively, what do we lose on continuing in the old way?

Many stories in parallel - nationally and locally

Being part of something bigger than just the here and now - everyone needs to create their own story and share it with others ...

To constantly do and simultaneously relate to what others are doing
Share your story with others and continue the story with others. And create learning moment on your own personal journey!

Emerging Lessons

1. **Connect national registry with front line teams** providing care to populations of people.
2. Develop **Leadership skills** to lead quality improvement
3. **Provide “help”** with coaching
4. “Activate” **care teams** to provide care and simultaneously improve care (**ownership**)
5. **Measure real time and over time outcomes** (process and clinical outcomes)
The Art & Science of Coaching Health Care Improvement

• Cultivating improvement capabilities
• Make it easy to do the right thing
• Helpful “model” or road map to guide planning and actions
• Balance of “Science” & “Art”