



RETHINKING AND RETOOLING THE COACHING PROCESS

How a Partnership With Voyage Advisory Helped One Client Create a More Empowering Mentorship Model



Consistency is difficult to achieve in any organization. The greater the number of employees and clients, the harder it is to keep everyone on the same page and delivering at the same level.

Coaching plays a critical role in this kind of business environment. An organization must learn to move beyond a mere script and checklist; it has to engage each person in the process and help them continuously improve service delivery.

That goal is precisely what our education services client was aiming for, and they brought Voyage Advisory in to help them get there.

THE COMPLEX TASK OF AN ADVISOR

Our client's educational advisors (EAs) work with students and schools across the country to help learners find the right college fit. EAs set each student up for success by walking them through the application and admissions process and seeing them through the start of their college experience (called a conversion).

Helping students along requires a complex and varied skill set. Every EA must be an administrator, counselor, advocate, and manager. With over 400 EAs working with different schools all over the U.S., it's a significant challenge for our client to help each one develop that complex set of skills. A guidebook isn't enough — they need coaching and nurturing to grow into the role and help students move closer to a degree.

Although our client had coaching in place, they wanted a way to make it more effective, efficient, standardized, and sustainable. Our job was to help them reboot and retool the coaching program to meet these goals.



PRACTICE AREA

SERVICE OPERATIONS

PROJECT DURATION

12 WEEKS

CLIENT

EDUCATION

INCONSISTENT COACHING GIVES INCONSISTENT RESULTS

At the outset of our partnership, the inconsistencies in our client's coaching program were similar to any organization that had expanded and grown through acquisitions over the years. Mentors were narrowly focused on getting EAs to increase conversions, but they weren't providing the tools and resources they needed to achieve that goal.

Depending on the supervisor or department, EAs had vastly different coaching experiences.

"There was no way to measure or monitor coaching because the majority of the employees were using their personal OneNotes, and there was no visibility or way to aggregate the data," said Dawn Davison, Management Consultant at Voyage Advisory and leader of the coaching transformation project. With so many EAs, mentors, and supervisors involved, the challenge would be to come up with a coaching solution they could all buy into.

STANDARDIZING THE PROCESS

After compiling feedback, we worked together with our client to help them articulate a goal that everyone could agree on:



"To provide a measurable, flexible, and standardized model for coaching and development that is tailored to individual needs; empowering the coach and coachee to collaborate on growth and performance."

It's not easy to create a standardized model that can be tailored to each individual. To achieve that result, we highlighted four key areas where our client saw a need for improvement.

REDEFINING COACHING

Any organization that wants to shift from a mere training mindset to a coaching mentality must undergo a significant and fundamental shift. Our client was no different in this regard.

When we first began working together, their coaches were more focused on getting EAs to check the boxes than to learn how to do the job well. Our client was aiming for something more collaborative – a process that would help EAs take ownership of their jobs and truly develop the skills needed to do it well. It had to be less about “command and control,” as Davison put it, and more about a shared process of growth and decision-making.

MOVING BEYOND METRICS

A key component of that mindset shift came in terms of the focus of coaching conversations. In the previous system, check-ins were mostly centered on conversion metrics. Was the agent meeting targets or not?

“When you’re talking about metrics, you can’t target that metric – you have to target the behaviors that lead to that metric,” Davison said.

Under the new coaching mentality, our client wanted to shift the focus toward those underlying behaviors. Coaches would help coaches determine why they were falling short and what they could change.

MULTIPLYING COACHES

Once the new coaching system was in place, our focus shifted to long-term sustainability. To keep the project success going, we created a system for continuing to develop coaches internally without our ongoing involvement.

Their coaching playbook outlines not only the details of the coaching process but an entire certification system that would allow coaches to move up in the ranks to coach other coaches. It provides a complete training program that would allow our client to maintain and grow their coaching system on their own.



DESIGNING FOR SUPPORT AND CONSISTENCY

As mentioned in the mission statement, our client wanted to standardize the entire coaching process into something reproducible. Even though specific goals would still be tailored to specific individuals, the overarching process would need to be something everyone understood and could use effectively.

To accomplish this goal, we worked with them to help develop two things. First, we created a coaching playbook. The mission statement above came straight from that playbook, and the rest of the book lays out the processes for coaching under this new system.

Second, we helped them create a tool for monitoring the coaching process. The tool we designed made it easy to record coaching results, and it integrated with the OneNote system the team was already using. Supervisors can now easily collect coaching notes and results, as well as aggregate data to look at overall coaching metrics.

READY TO REBOOT YOUR COACHING?

In redeveloping their coaching process, our client wanted to create something that was both consistent and flexible. By focusing on behaviors over metrics, relying on standardized tools, and creating their own system for certification, our client is poised to equip new EAs for success for years to come.

Does your business need a coaching overhaul? You’ve probably got some great ideas to make it happen, but you just need a partner to help you bring it all together. Reach out to Voyage Advisory so we can start the journey with you today.

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