

The Art & Science of Coaching

How to be the Coach your Accounting Team Needs



Ground Rules & Expectations

Be present!

- Eliminate distractions as much as possible

Be engaged!

- Ask questions & participate
- Use the chat

Be open-minded!

- Everyone has something to learn, everyone has something to teach



Agenda

- Coaching
 - What it is
 - CTA Framework
- The Coach Approach
- Commitments & Celebration





What is Coaching?



Let me tell you a story about... ME!



Let me tell you a story about... ME!





Consultant vs. Mentor vs. Coach



Consultant vs. Mentor vs. Coach

Consultant

- Tells you what to do & fixes your problems.

Mentor

- Tells you what to do based on their own past experience.

Coach

- They don't fix your problems.
- Sees you as naturally creative, resourceful, whole & capable.
- Get curious & help you discover the answers that are right for you.



Example: Baking a Cake



Consultant:

- “Here is the recipe, I brought the ingredients, I will go in the kitchen & bake the cake for you.”

Example: Baking a Cake

Mentor:

- “I’ve made a cake before, let me tell you how I baked mine.”



Example: Baking a Cake



Coach:

- You want to bake a cake? **You can totally do it.**
- I am going to **ask questions** & together we will **collaborate** & create the recipe of the cake that is **right for YOU.**
- You go in the kitchen, & I'll be with you every step of the way, to **support**, challenge, & **celebrate** you!

Turns out I had no idea what coaching was...

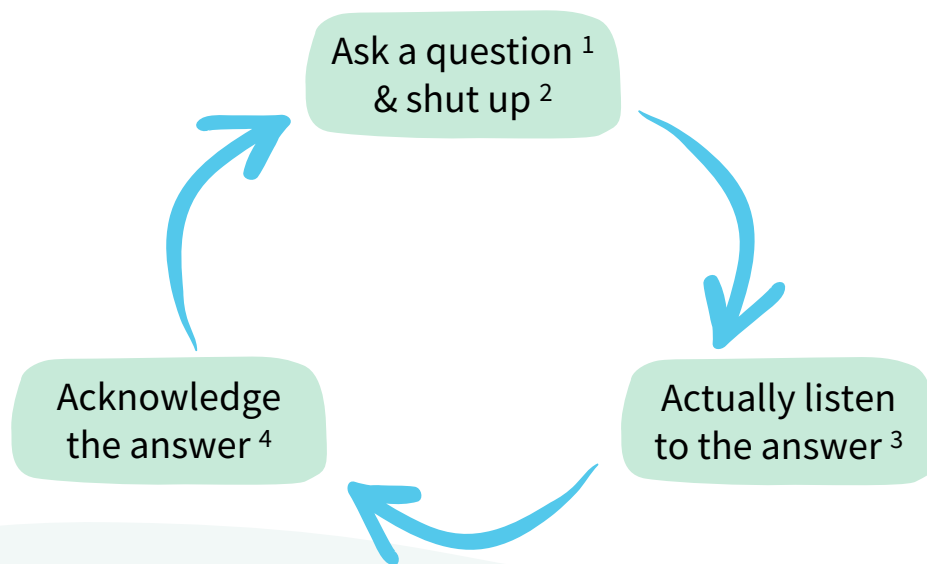
- Coaching is **not** about telling people what to do, or jumping in & fixing their problems.
- Coaching is rooted in **curiosity** - asking questions, & helping people discover the right answers for themselves.
- Coaching is rooted in holding a **non-judgmental** space, & **listening** to understand the other person, not just to respond to them.



The essence of coaching lies in helping others & unlocking their potential.



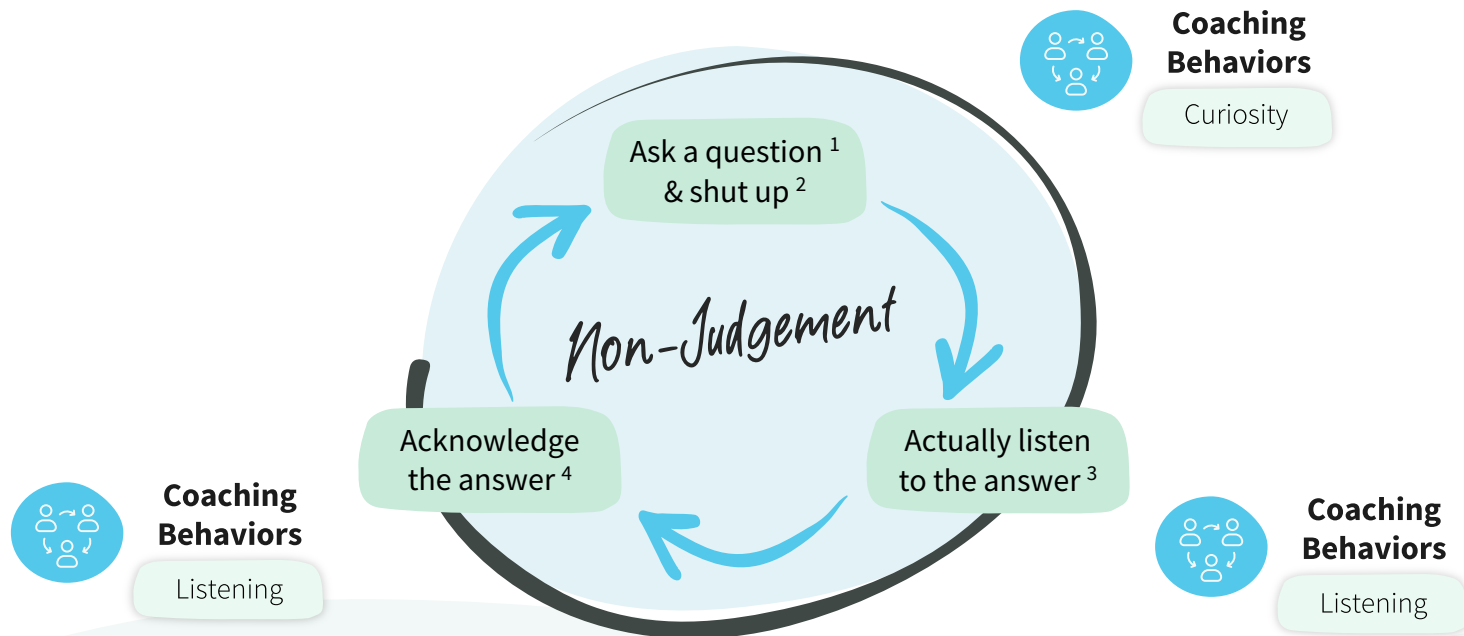
Coaching in a Nutshell



1. Not a fake question.
2. Stop talking. Really.

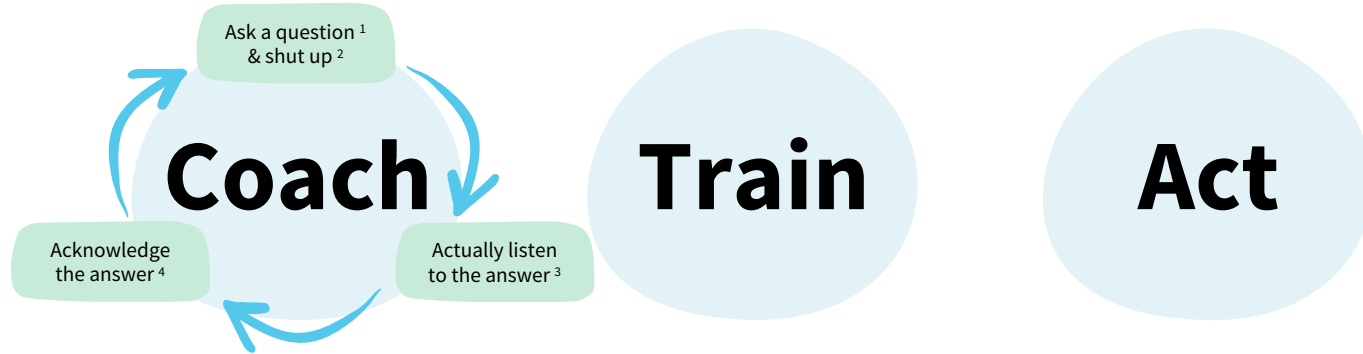
3. No fake listening.
4. Not by offering advice.

Coaching in a Nutshell





CTA Framework



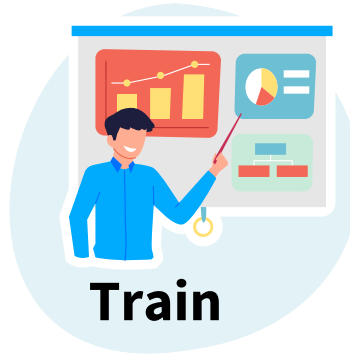
In each moment you are operating in one of these 3 modes.

CTA Framework



Coach

Support & *empower* someone to do it on their own.



Train

Show someone *how* to do it.



Act

Jump in & do it *for* someone.

CTA Framework:

Give a Person a Fish vs. Teaching them to Fish



Act

Jump in & do it
for someone.



CTA Framework:

Give a Man a Fish vs. Teaching him to Fish



Show someone
how to do it.



CTA Framework:

Give a Man a Fish vs. Teaching him to Fish



Coach

Support & *empower* someone to do it on their own.



CTA Framework:

When & Why you Wear each Hat



Develop existing
knowledge & abilities.



Gain new
knowledge & abilities.



Absence of
knowledge & abilities.

CTA Framework

- Throughout your day as you support your teams, you are always C, T, or A.
- Become aware of how you're spending your time.
- Work to shift majority of your time & effort to Coaching.



CHALLENGE: CTA Audit

1

Coaching Challenge: CTA Framework

CTA Audit Challenge

Objective: Increase awareness of how much time you spend in Coaching (C), Training (T), & Acting (A) & shift toward more Coaching where appropriate.

Step 1: Identify Key Work Relationships

List **five key relationships** at work (direct reports, peers, key stakeholders, etc.). If you manage a team, list **each direct report** individually.

Name/Role	Acting %	Training %	Coaching %



The Coach Approach

How to Shift from A → C



**Coaching
Mindset**



**Coaching
Behaviors**



**The Coach
Approach**

Why Mindset Matters



- Research shows that your mindset plays a significant role in determining the outcomes of your life.
- Your mindset directly impacts whether you succeed or fail.
 - Your mind (aka thoughts) can be your best friend or your worst enemy.

Why Mindset is Important: The Thought Model



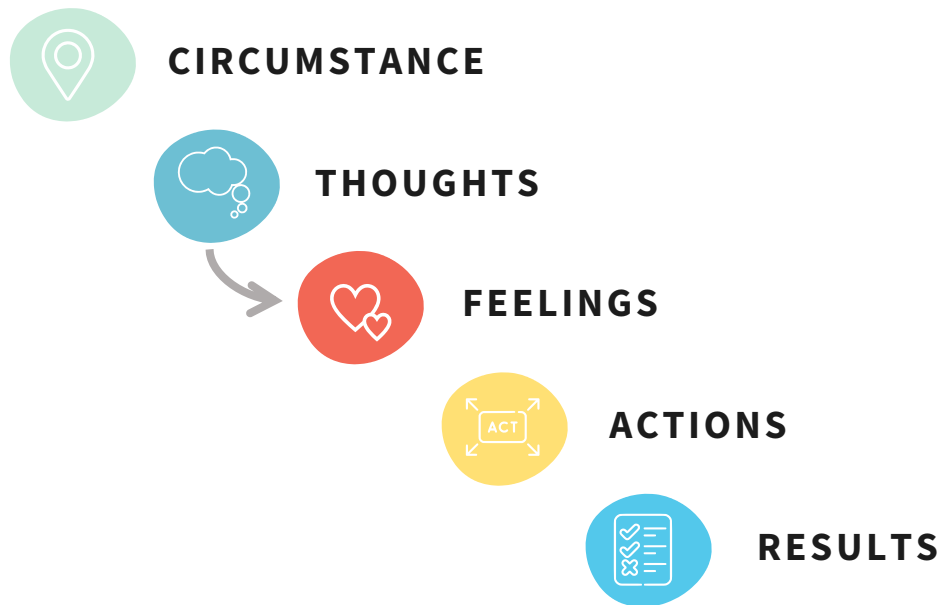
**The Thought Model is derived from Cognitive Behavioral Psychology*

Why Mindset is Important: The Thought Model



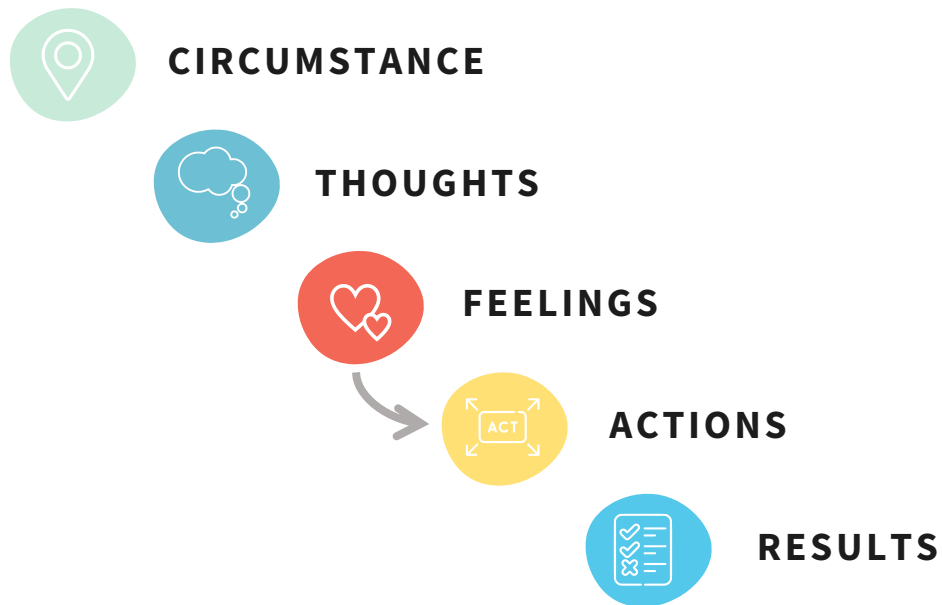
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Why Mindset is Important: The Thought Model



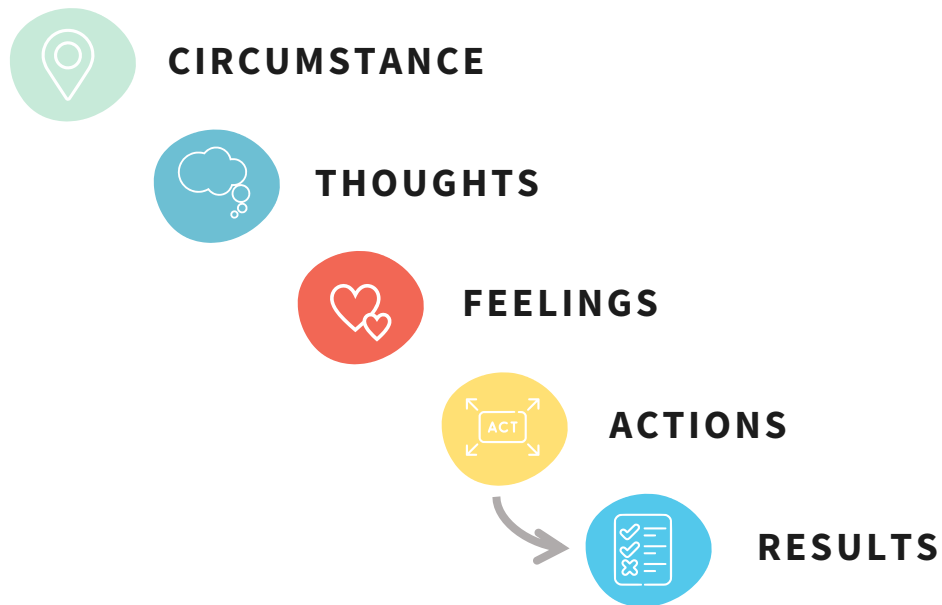
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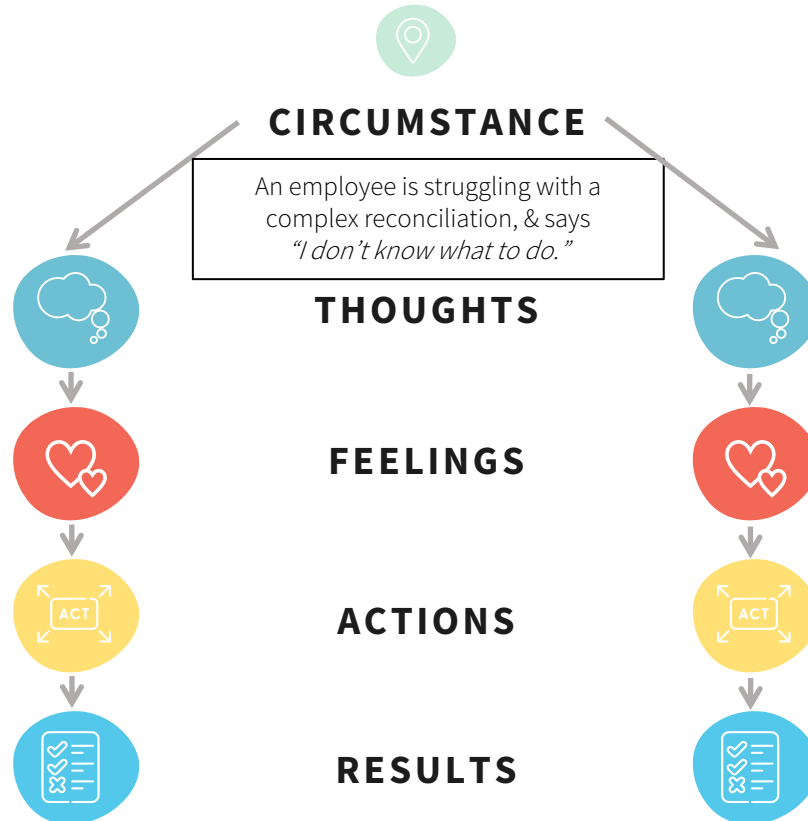
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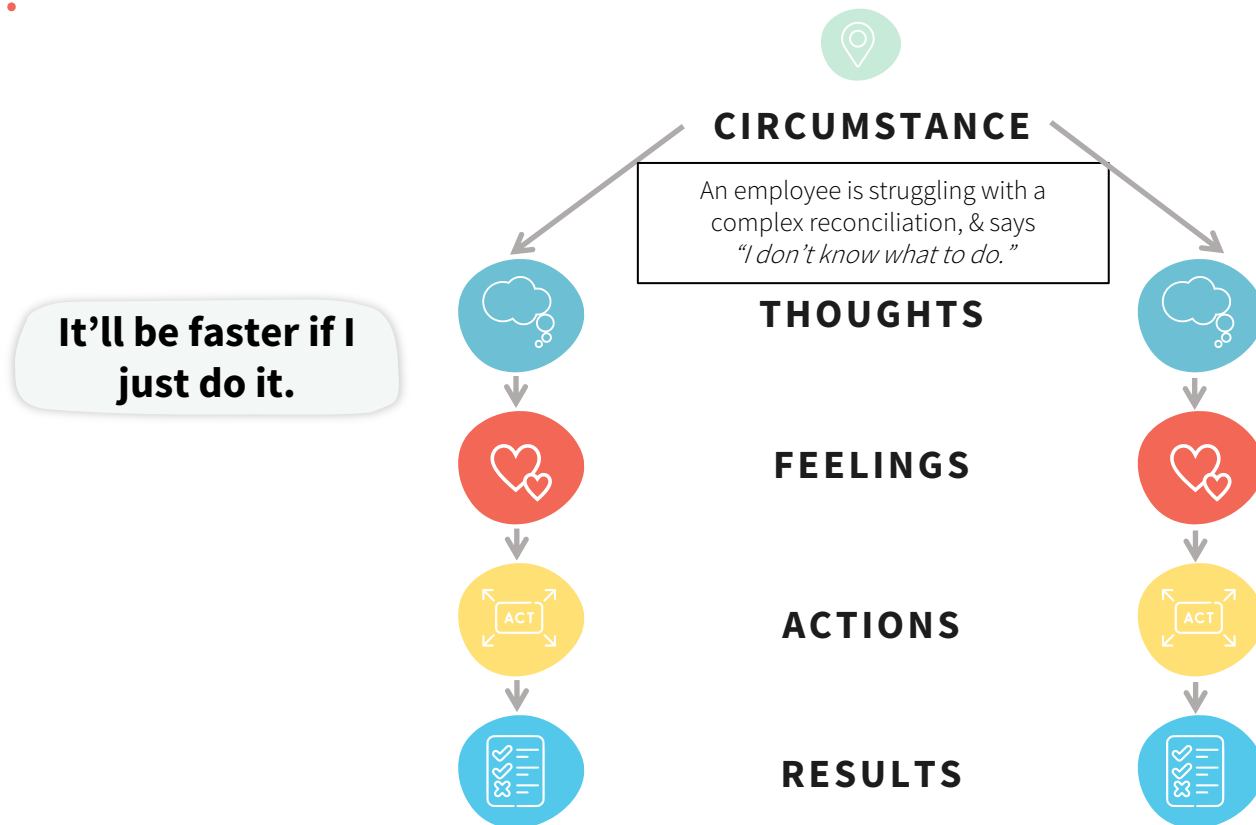


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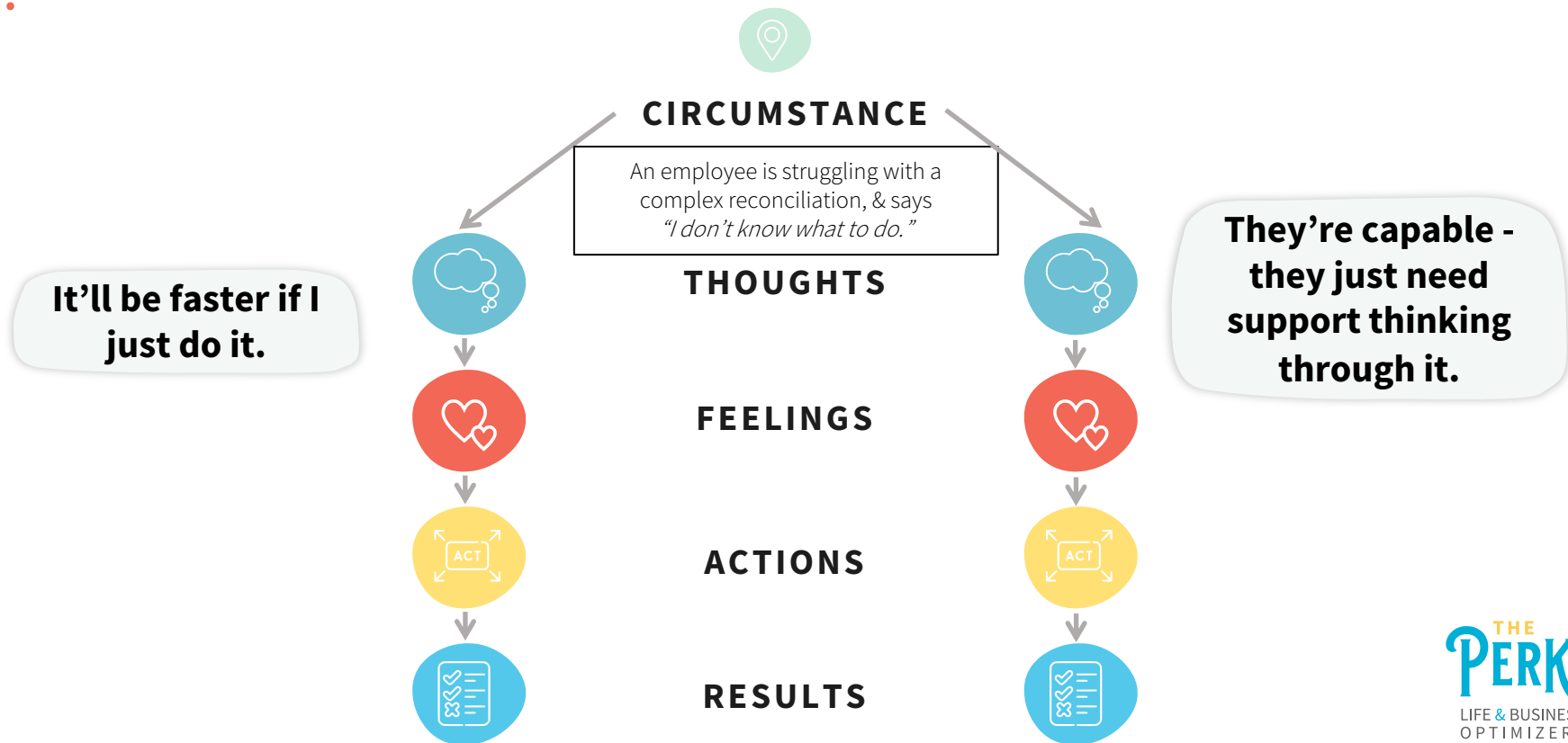
The Thought Model



The Thought Model



The Thought Model



Coaching Mindset



Hero



Guide



Action



Transformation



Problem

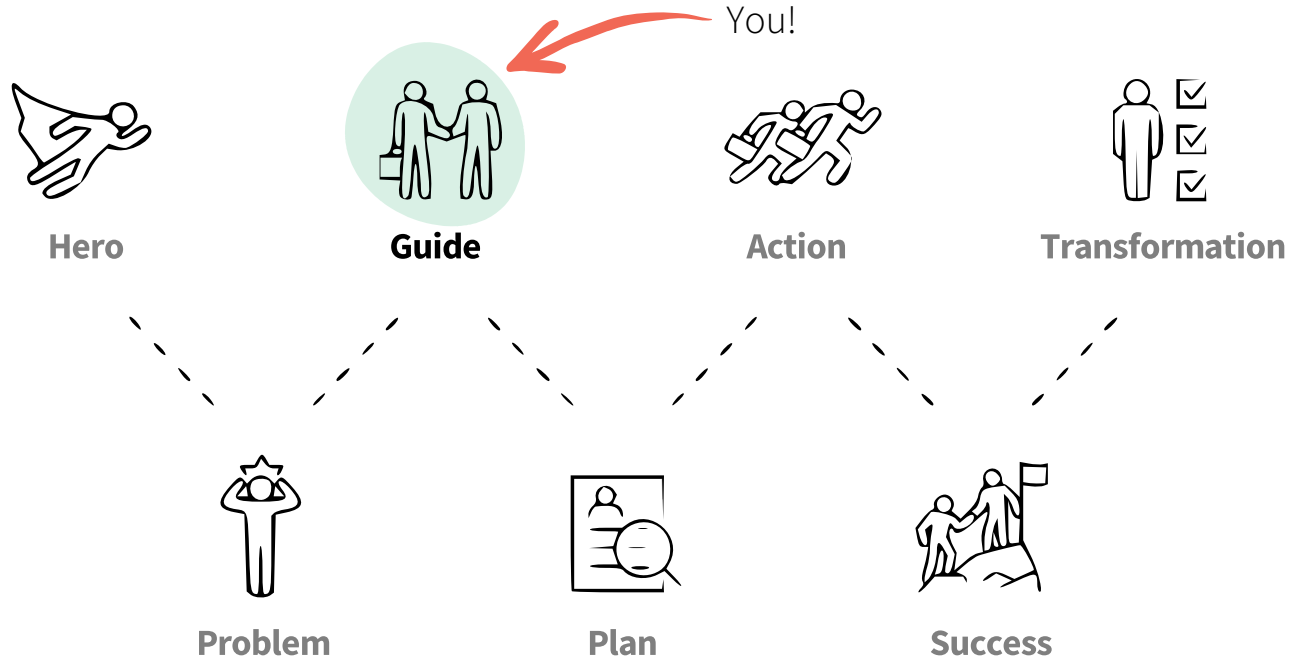


Plan

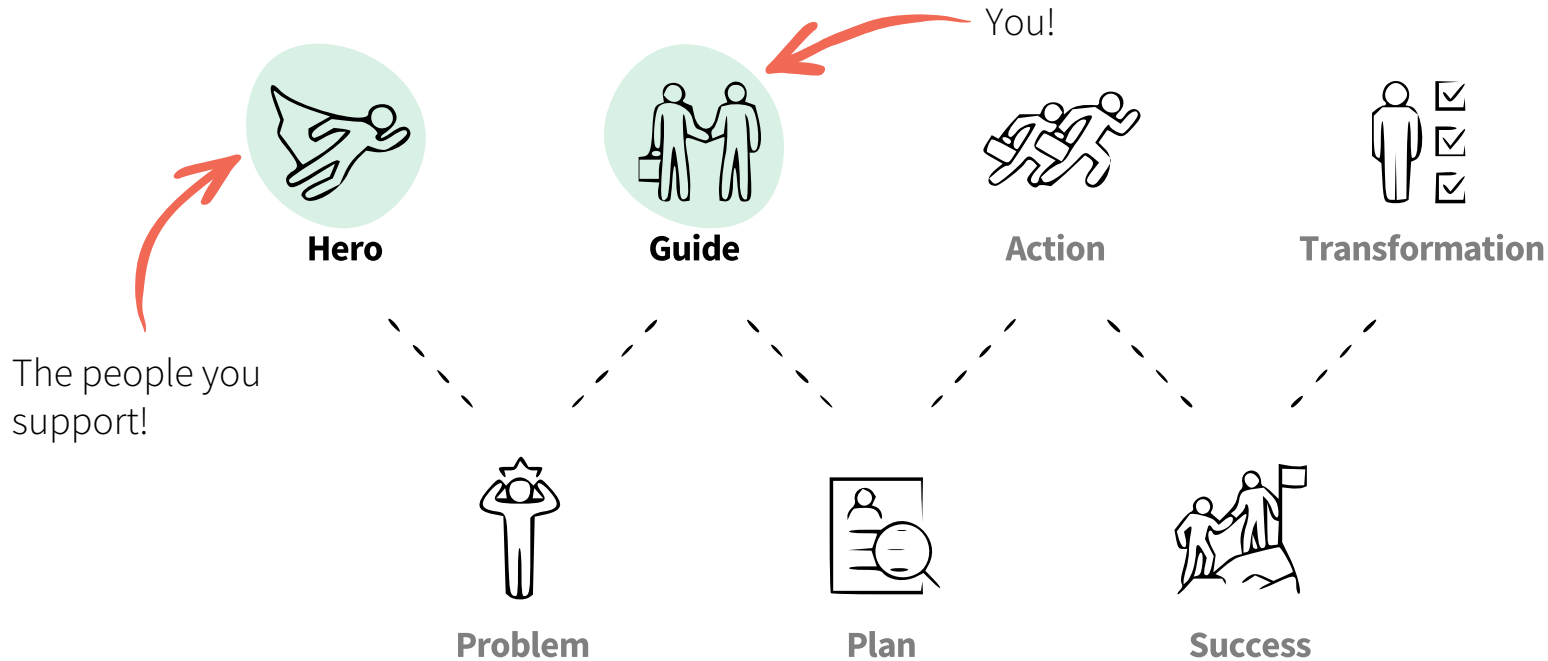


Success

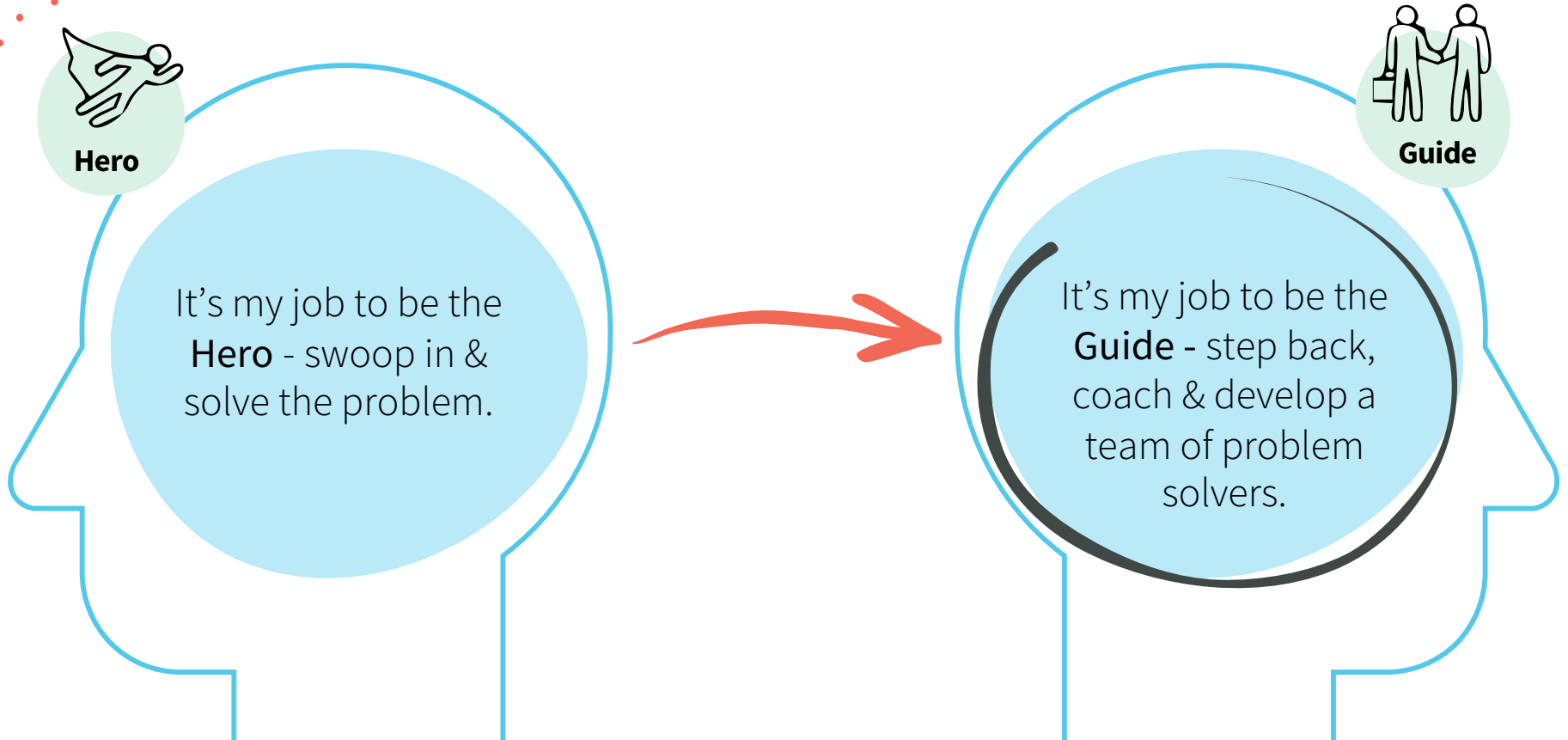
Coaching Mindset



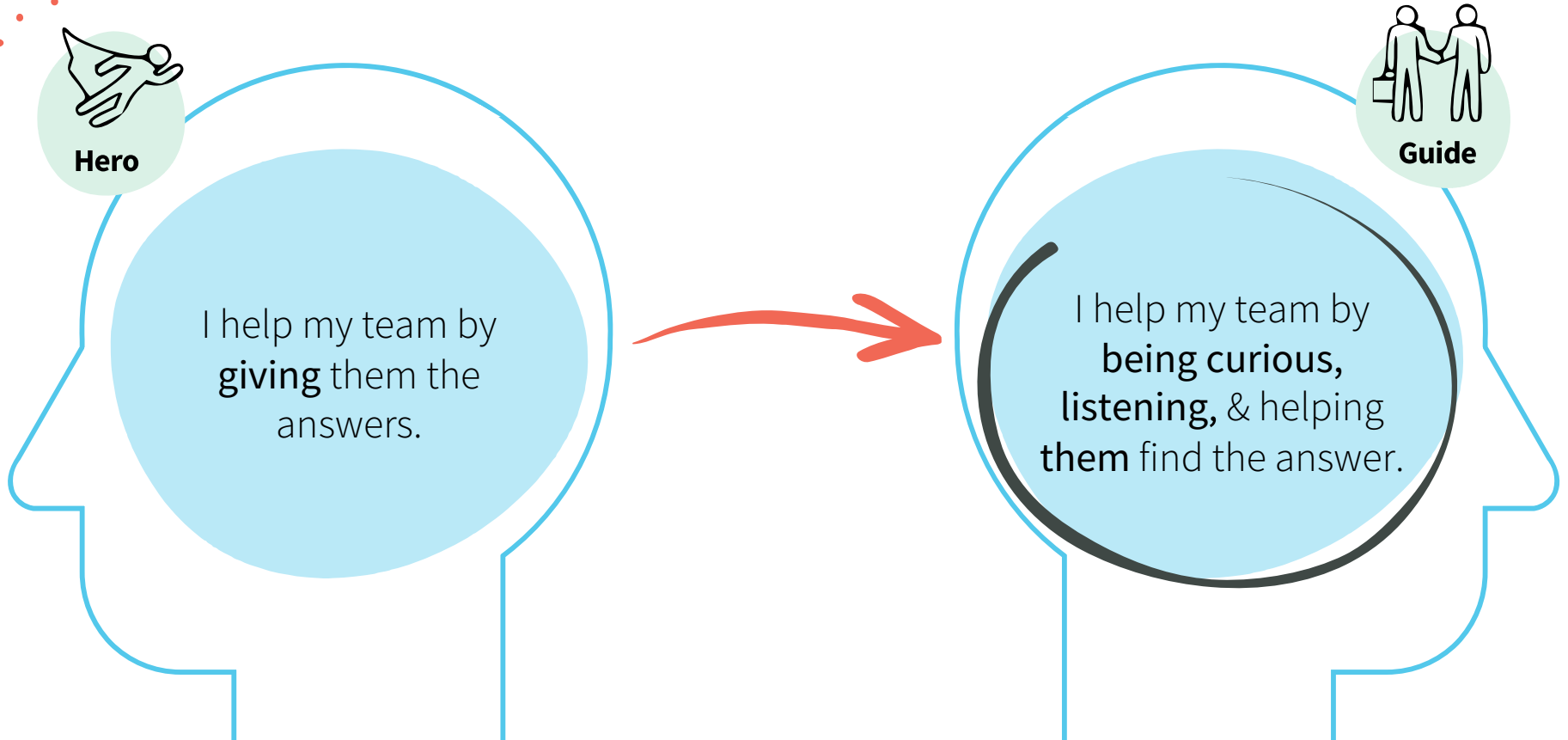
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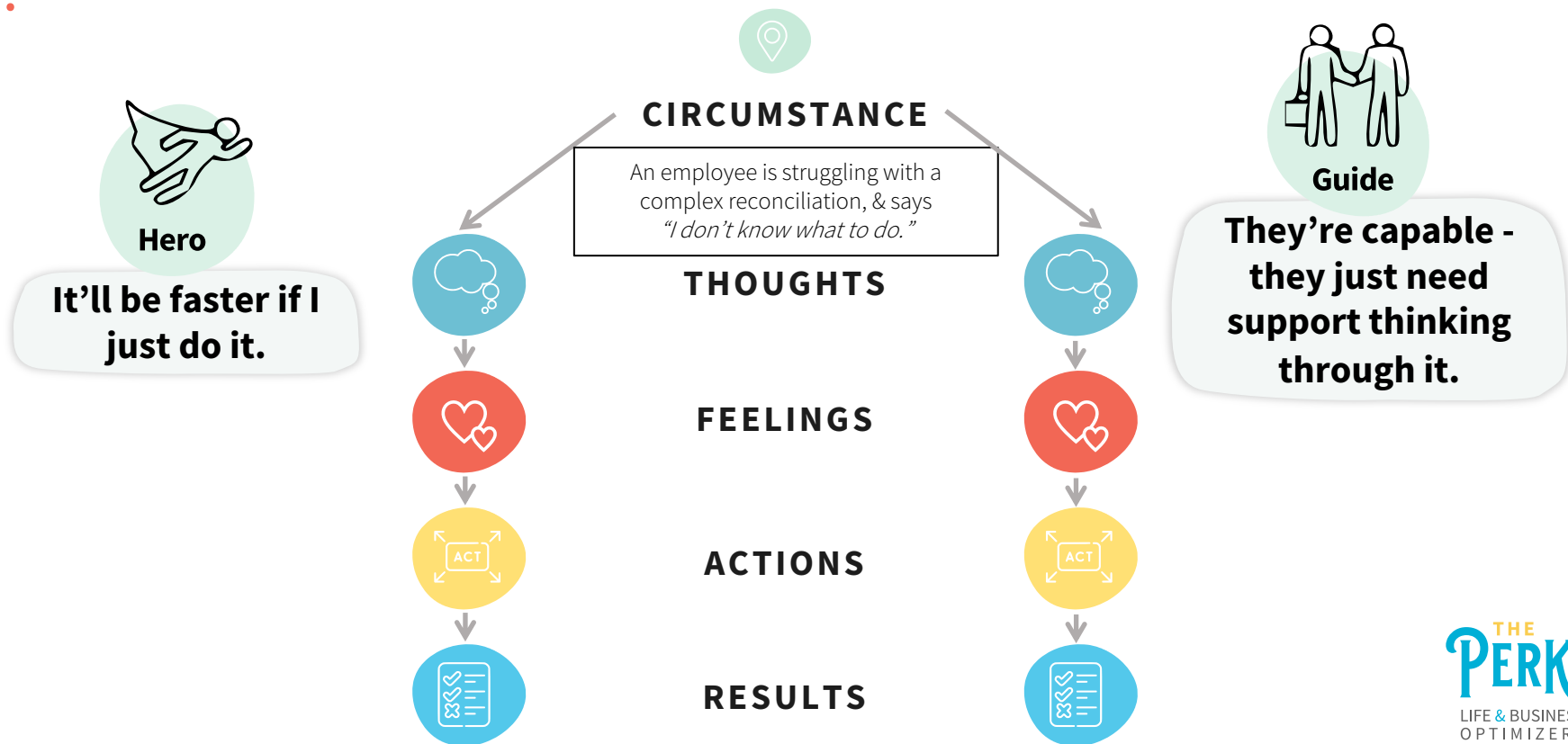
Shift your Mindset



Shift your Mindset



The Thought Model



From Crutch to Coach



- Your goal is to go from having your people be completely reliant on you for support (*a crutch*) to a position of leadership & guidance (*a coach*).
- You still get to help & support people.
 - You are redefining what support & service looks like.

Redefine Support



Support does NOT mean:

- Coddling.
- Telling them what to do.
- Fixing their problems for them.

Support as a Coach means...



- Holding a safe, nonjudgmental space
- Getting curious
- Listening
- Collaborating
- Challenging
- Holding their feet to the fire (accountability)
- Championing & celebrating

Coaching is not a warm, fuzzy love fest



- It isn't tension-free.
- You are challenging the other person to stretch, grow, change their mindset, & change their behaviors.
- These are hard, uncomfortable things, but you do it in *service* of them, to help them learn & grow.
 - You do it in *service* of the organization.
 - You do it in *service* of yourself.

CHALLENGE: Shift to a Coaching Mindset



Coaching Challenge: Shift to a Coaching Mindset

Hero-to-Guide Shift Challenge

Objective: Identify a real moment where you would normally step in as a **Hero** & instead intentionally shift into the **Guide** role by using coaching techniques.

Step 1: Identify a "Hero" Moment

At the start of the week, identify one specific work situation where you typically:

- Step in & solve the problem
- Give answers instead of asking questions
- Feel like the 'rescuer' instead of the 'coach'

Examples:

- A team member comes to you with a problem, & you usually tell them what to do.
- A direct report asks for a decision, and you normally make it for them.
- A project is behind, & your instinct is to take over instead of guiding the team.

Step 2: Shift to a Guide Mindset

When this situation happens this week, try a different approach:

Get curious. Ask coaching questions instead of giving answers.

Listen more than you talk. Resist the urge to jump in.

Empower them. Let them own the solution.

The Coach Approach

How to Shift from A → C



**Coaching
Mindset**



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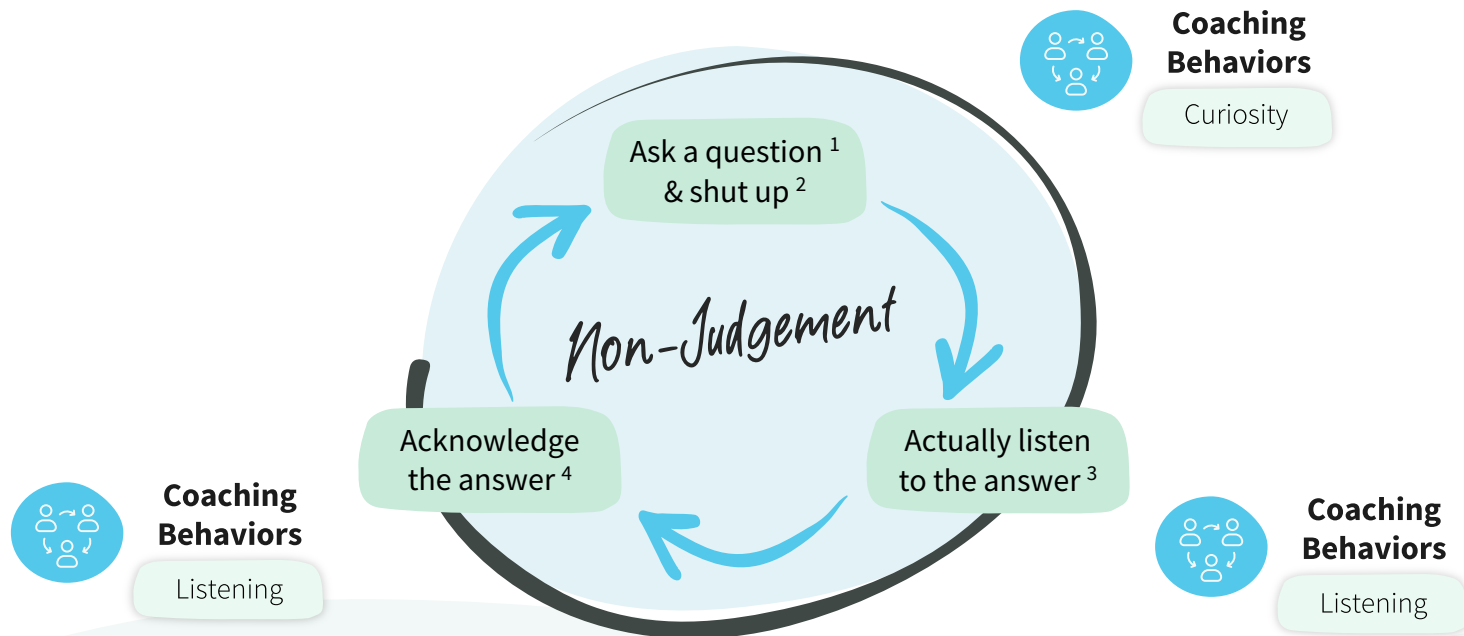
The Coach Approach

Coaching Behaviors



- 1 Curiosity: Ask Powerful, Open-Ended Questions
- 2 Listen to Understand, Not to Respond
- 3 Hold Space & Accountability Simultaneously

Coaching in a Nutshell



Curiosity



Curiosity is the quality that starts the coaching process & the energy that keeps it going.



When you're curious, you ask questions.



- Curiosity, & coaching, starts with a question.
- If you're not asking questions, you're not coaching.



Powerful Questions

- Not all questions are created equal.
- Focus on asking **Powerful Questions**.



Powerful Questions are:

Open-ended

- Expansive & invite exploration.
- Not “Yes” or “No” questions.

Nonjudgmental

- No agenda – not trying to lead them down a specific path.
- Help you genuinely understand the other person’s perspectives & ideas.



Powerful Questions Pro-Tip:

Focus on asking **‘What’** questions



Coaching Pro-Tip: Ask “What” Questions

Less Powerful Questions	Powerful Questions
Why did you do it this way?	What was your thinking behind this approach?
Why are you focusing on this?	What makes this the most important problem to work on right now?
How are you going to get these results?	What steps are you testing to move forward? What makes this a good next experiment?
Why didn't you hit your goal?	What did you learn from the outcome? What insights are you taking into your next step?
Who dropped the ball on this?	What part of our process needs more support or clarity to prevent this going forward?



Let's play a game!



**Spot the
Powerful Question**

Spot the Powerful Question

A.

Why are you
focusing on this?



B.

What's important
about this, to you?





Spot the Powerful Question

Why are you
focusing on this?



B.

What's important
about this, to you?



- Uncovers Core Motivations
- Invites Reflection, Not Defense
- Builds Connection & Trust

Spot the Powerful Question

A.

What makes this an effective strategy, for you?



B.

Why did you do it this way?





Spot the Powerful Question

A.

What makes this an effective strategy, for you?



Why did you do it this way?





- Promotes Ownership & Insight
- Assumes Positive Intent

GROW Coaching Framework

	Goal	What do you want to achieve?	<ul style="list-style-type: none"> • Definition of goal: How will you know you achieved this goal? • Make sure that the goal is SMART: Specific, Measurable, Attainable, Realistic, and Time-bound.
	Reality	Where are you now?	<ul style="list-style-type: none"> • What is happening now - what, who, when and how often? • Fully consider the starting point. What resources do you have to help you?
	Options	What could you do?	<ul style="list-style-type: none"> • What are potential obstacles in the way? • Which options could bridge the gap from reality to goal? • Which obstacles are stopping you from getting where you want to be?
	Will	What is the plan? What will you do now?	<ul style="list-style-type: none"> • Commit to specific actions in order to move towards the goal (action plan). • Decide on a date when you review the progress in order to provide some accountability.





Coaching Example:

In 1:1, employee says they're struggling to make progress on one of their goals.

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- What's important about achieving this goal, for you?
 - Why does it matter?
 - In what way(s) is it aligned with our firm's goals & vision, & your own personal vision of success?
- What does success look like?
- How will you know you're making progress?
- Where are you at now?
 - What metrics are you tracking now to see & feel your progress?

Coaching Example:

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- What's getting in your way of success?
 - What does that feel like for you?
- What needs to change for you to feel like you're making progress?
 - What ideas do you have?
 - Let's collaborate!

Coaching Example:

	Goal	What do you want to achieve?	<ul style="list-style-type: none"> Definition of goal: How will you know you achieved this goal? Make sure that the goal is SMART: Specific, Measurable, Attainable, Realistic, and Time-bound.
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	Will	What is the plan? What will you do now?	<ul style="list-style-type: none"> Commit to specific actions in order to move towards the goal (action plan). Decide on a date when you review the progress in order to provide some accountability.

- Based on our conversation, what's the best next step, from your perspective?
- What is one way I can support you with this between now & our next 1:1?
- In what way(s) can I hold you accountable?



CHALLENGE: Powerful Questions

3

Coaching Challenge: Get Curious & Ask Powerful Questions

Powerful Question Challenge

Objective: Strengthen the habit of asking powerful questions instead of providing answers or making assumptions in daily work interactions.

Step 1: Identify Three Key Conversations This Week

At the start of the week, pick **three real conversations** where you will intentionally use a **powerful question** instead of giving advice or making a judgment.

- A 1:1 with a team member
- A project discussion
- A coaching or feedback conversation
- A casual team check-in

Step 2: Use a Powerful Question Instead of Your Default Response

During each conversation, pause before responding & choose one powerful question from the list below instead of your usual statement.

Examples of Powerful Questions to Use:

- ✓ What's the real challenge here for you?
- ✓ What options do you see?
- ✓ What do you need to move forward?
- ✓ What's important to you about this?
- ✓ What have you tried so far? What else?

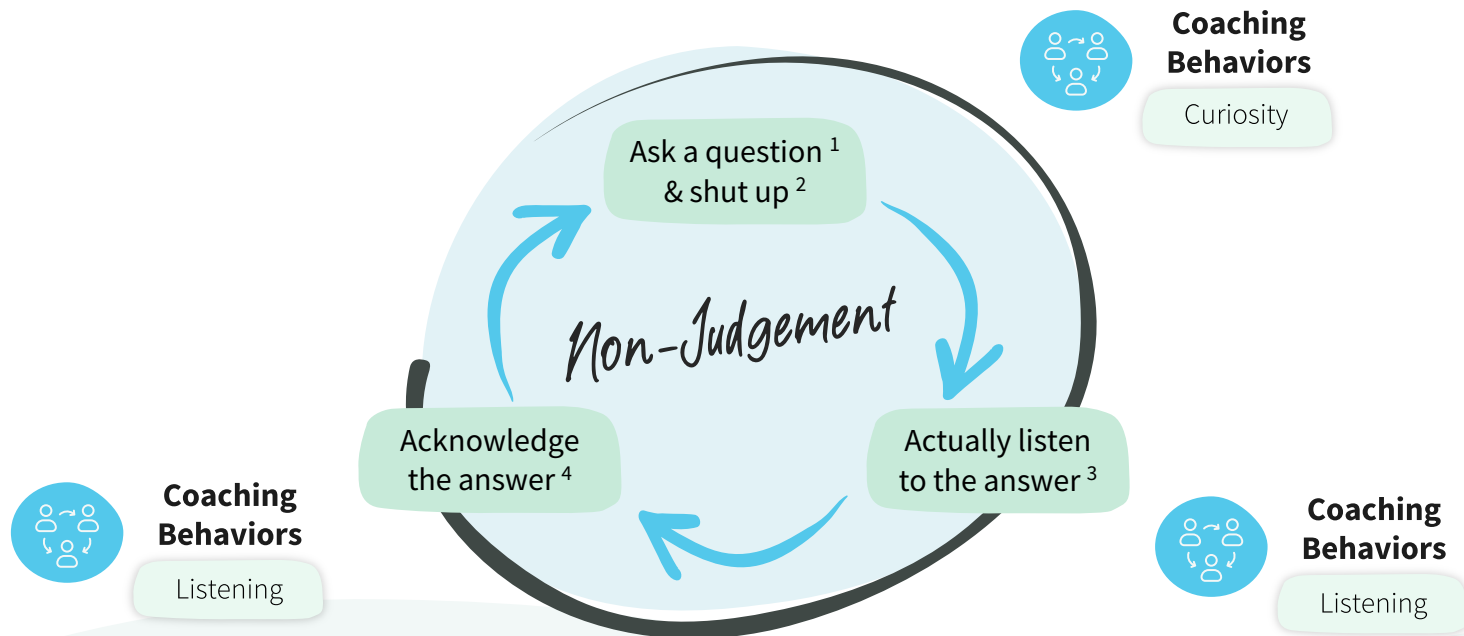
The Coach Approach

Coaching Behaviors



- 1 Curiosity: Ask Powerful, Open-Ended Questions
- 2 Listen to Understand. Not to Respond
- 3 Hold Space & Accountability Simultaneously

Coaching in a Nutshell





Listen to Understand, not Respond



3 Levels of Listening

Level 1

Awareness is
on **Yourself.**

Level 2

Level 3



3 Levels of Listening

Level 1

Awareness is
on **Yourself**.

Level 2

Focused awareness on
the **other person**.

*You're listening
to their words.*

Level 3



3 Levels of Listening

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Awareness is
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Focused awareness on
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Level 3

Global awareness.

*You're listening to
their energy, tone,
& body language.*



Listen to Understand, not Respond

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Awareness is
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Focused awareness on
the **other person**.

*You're listening
to their words.*

Level 3

Global awareness.

*You're listening to
their energy, tone,
& body language.*



*Listening to
respond*

*Listening to
understand*

Listening Pro-Tip: Eliminate Distractions



- Distraction destroys connection!
- You can't be present with distractions
- You can't listen at a level 3 with distractions
- You can't be genuinely curious with distractions

Curate your environment to Level 3 Listen



- Put down your phone.
- Turn off notifications.
 - **Communicate** if you will be monitoring your phone & why.

“

*Attention is the rarest &
purest form of generosity.*

— Simone Weil

Listening Pro-Tip: Pay Attention to Tone

“

*We're constantly misreading facial expressions & misinterpreting body language. **The tone of voice is a more accurate, purer signal of what people are feeling.***

The trouble you have reading emotions in text messages is because you can't hear their tone, not because you can't see their face.



Adam Grant

Best Practice:



- Pick up the phone & call the person, or jump on Teams/Slack/Zoom.
- Send a voice memo or video so they can hear your tone.
- This is especially important when the communication is sensitive.

CHALLENGE: Listen at a Level 3

4

Coaching Challenge: Listen at a Level 3

Level 3 Listening Challenge

Objective: Build deeper awareness of how you listen & practice Level 3 Listening in real interactions.

Step 1: Identify Two Listening Opportunities

This week, choose two different situations where you will intentionally practice Level 3 Listening (fully engaged, paying attention to words, tone, & body language).

- A 1:1 with a direct report
- A team meeting
- A coaching conversation
- A family or personal interaction



Pro-Tip: Pick a situation where you usually find yourself distracted or jumping in to fix the problem.

Step 2: Eliminate Distractions & Fully Tune In

Before each conversation:

- ✓ Put away your phone & turn off notifications.
- ✓ Mentally pause before responding. Instead of preparing your answer, stay fully engaged in listening.
- ✓ Observe non-verbal cues. Pay attention to body language, tone, & energy—not just words.

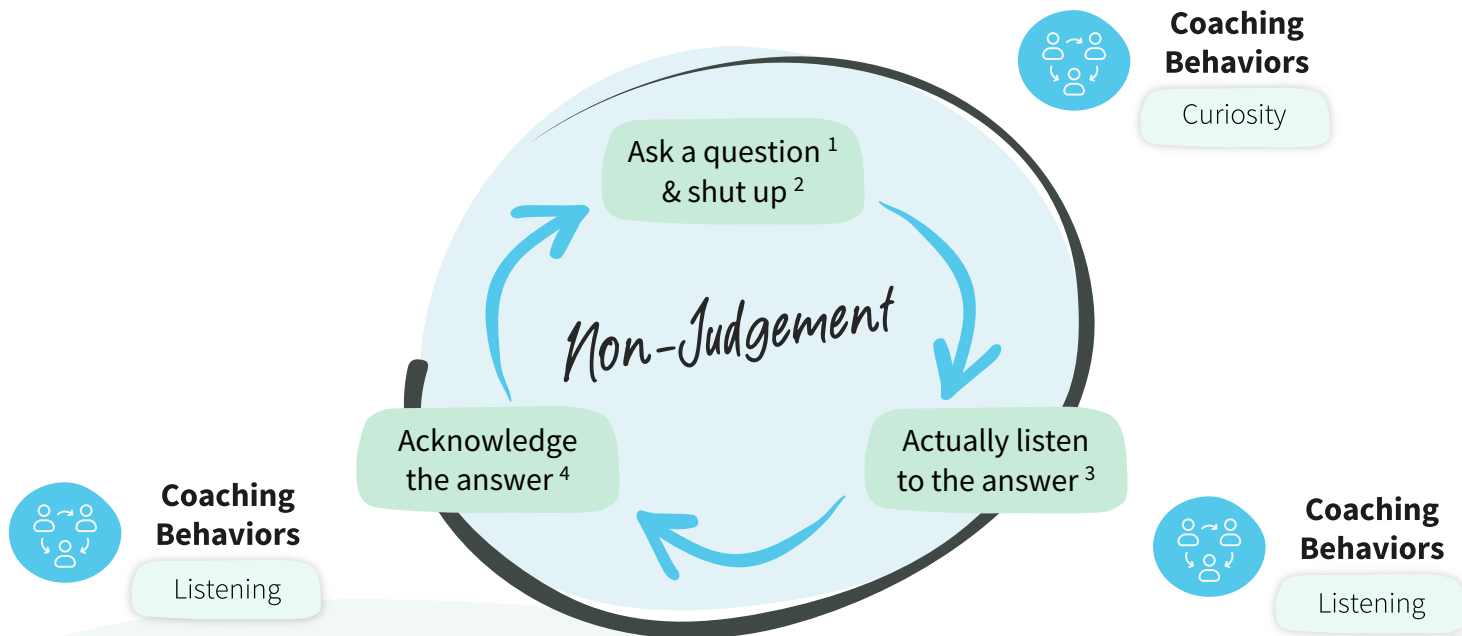
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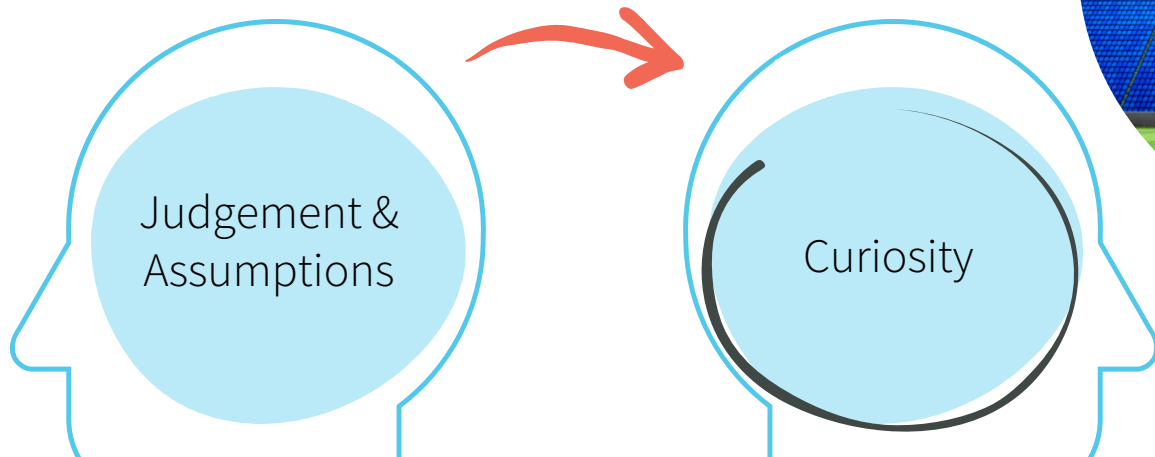
Hold a Safe, Non-Judgmental Space

- People won't open up, reflect honestly or take risks if they feel judged or criticized.
- Coaching can't happen if trust doesn't exist between you & the other person.
 - Judgement breaks trust.



“Be Curious, Not Judgmental”

- Curiosity & judgement can't coexist.
- When you find yourself making judgements or assumptions, that's your trigger to shift into curiosity.



Curiosity Mindsets



Judgmental Mindset

I would never do it that way.

Curious Mindset

What can I learn from their approach?

YOU'RE AMAZING

Judgmental Mindset

That's a dumb idea.

Curious Mindset

What might they see that I'm not seeing?
What led them to suggest this?

Judgmental Mindset

They'll never be able to do it as good as me.

Curious Mindset

What if, with the right training, they could do it even better than me?



“Be Curious, Not Judgmental”

- To be great leaders & coaches, we need to enter rooms & conversations with **curiosity & openness**.
- We must leave our judgements, egos, & assumptions at the door.



Accountability isn't a Burden, it's a Belief.



- Great coaches & leaders hold people accountable *because* they believe in their potential.
- Accountability says:
 - “I see what you're capable of.”
 - “I won't let you settle.”
 - “I'm here to support you.”



“

A critic sees your weaknesses & attacks your worst self.

A cheerleader sees your strengths & celebrates your best self.

A Coach sees your potential & helps you become a better version of yourself.



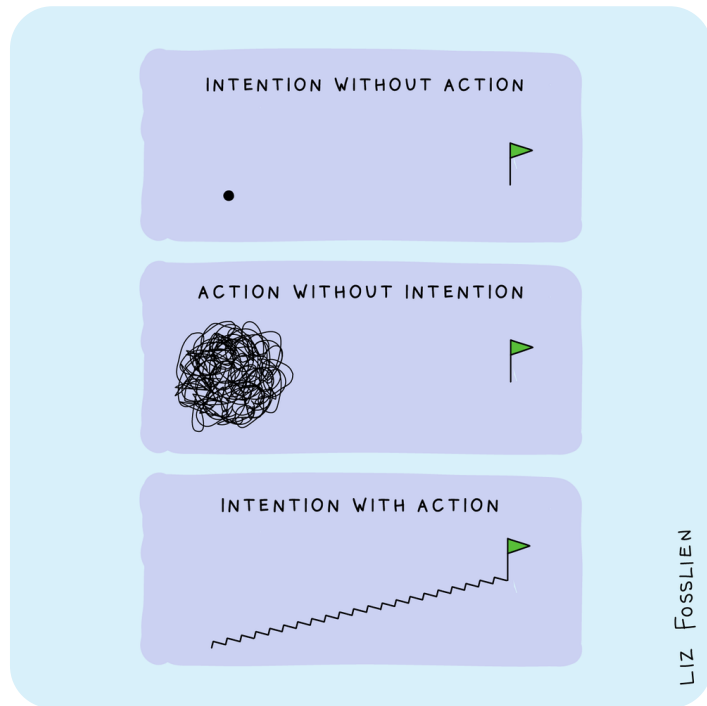
Adam Grant

Accountability shows you Care



- When you hold people accountable, you're saying:
 - "I care enough not to look the other way."
 - "Your growth matters to me."
 - "You're not in this alone."

Coaching REQUIRES Action + Commitment



- Your coaching conversations should end with a 'Take Action' plan:
 - “What will you do now?”
 - “What do you commit to?”
 - “Based on our conversation, what are the next steps you will take?”
- ^ THIS is what you then hold them accountable to!

Neuroscience Nugget



- Our brains are wired for connection & consistency.
- When leaders follow through with accountability, it builds psychological safety, because people know what to expect & trust you're invested in them.

Coach's mindset shift: Accountability isn't conflict; it's compassion in action.

The Coach Approach

Coaching Behaviors

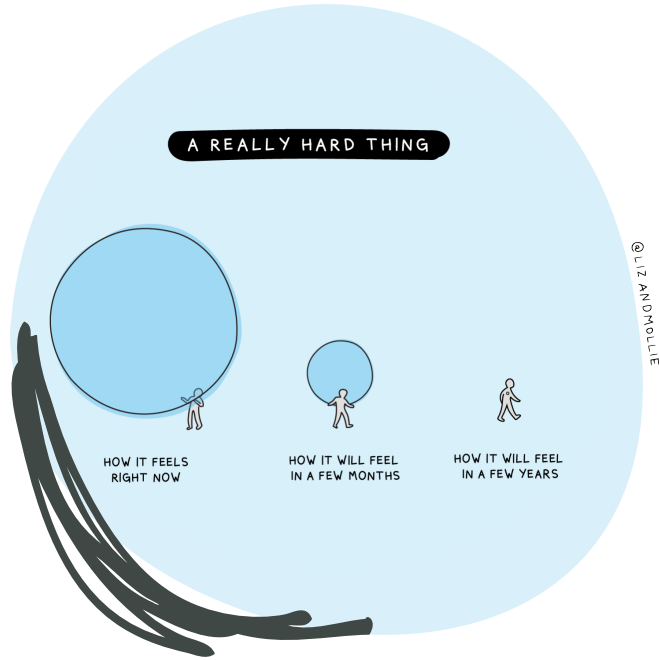


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CONGRATULATIONS! YOU MADE IT!



Commitments!



- What was your biggest learning today?
- What is **one thing** you commit to putting into action from today's workshop?



**YOU'RE
AMAZING**



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Leadership Coach
Culture Consultant

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on LinkedIn!**

