Coaching/Mentoring Diary: Level 5 Unit

Undertake management coaching or   
mentoring in the workplace

This diary of activity will help you to plan and structure the coaching or mentoring sessions, based on six sessions with your client. A simple contract (which you can add to if you wish) and space for you to record the outcomes of the diagnostics used are included. The diary will support the achievement of this unit, although you will need to supplement it with some additional work: please refer to the assessment criteria for this unit.

Use this diary alongside the Reflective Log, so that you can reflect on your skills, knowledge and behaviours, as you progress through the sessions.

Once you complete your sessions, ask your coachee/mentee to give you feedback: you can use the feedback sheet provided separately.

These three documents will be of great benefit to you when you come to prepare your reflective review and will provide the evidence to support the review.It is essential that you also refer to the unit assessment criteria to ensure that every one is addressed.

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| Name of Coach/Mentor: |
| Client Reference: |
| Start Date of Activity: |
| Total number of hours: |
|  |
| Upon completion of the coaching/mentoring activity: |
| Signature of Coach/Mentor Date |
| Signature of Coachee/Mentee: Date |

Explain the rationale for coaching or   
mentoring for the client:

1.1.1 The Coaching/Mentoring Contract

In signing this agreement, both parties agree:

* To meet for \_\_\_\_hrs. for \_\_\_\_ sessions over the next \_\_\_ months
* To be honest and committed to the contracted activity
* To keep all appointments. Where cancellation is unavoidable, to ensure prompt rescheduling
* To maintain confidentiality regarding our discussions
* To have a ‘no fault’ divorce if the relationship does not suit either party
* To be open to receiving and giving feedback

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| Signature of Coach/Mentor Date |
| Signature of Coachee/Mentee: Date |

1.1.2 Coachee’s/Mentee’s objectives/long-term goals/development needs:

1.1.2 How do these fit with organisational, divisional and/or team goals?

1.1.3 Plan a short coaching or mentoring programme with the client:

(e.g. practical details of time, place, expected duration, client constraints)

Record of Diagnostics:

Coachee’s/Mentee’s Learning style

Other Diagnostic tools used & results

Qualifications

Experience

Coachee’s/Mentee’s SWOT

|  |  |
| --- | --- |
| Strengths | Weaknesses/Needs |
| Opportunities | Barriers/Threats |

Goal/focus/topic for today’s meeting:

Reality/current situation:

Options generated to achieve goal:

|  |
| --- |
| 1 |
| 2 |
| 3 |

Willingness and commitment of coachee/mentee

|  |  |  |  |
| --- | --- | --- | --- |
| Action/next steps | Target date | Measurement of success | Willingness of coachee/ mentee |
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| Action for Coach/mentor: |
| Date of next meeting: |
| Review of progress since last meeting: |

Goal/focus/topic for today’s meeting:

Reality/current situation:

Options generated to achieve goal:

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| --- |
| 1 |
| 2 |
| 3 |

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| 2 |
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Willingness and commitment of coachee/mentee

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| Action/next steps | Target date | Measurement of success | Willingness of coachee/ mentee |
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| Action for Coach/mentor: |
| Date of next meeting: |
| Review of progress since last meeting: |

2.4 & 3.1 Review of the coaching/mentoring programme

To what extent have the goals of the client been met?

How has coaching/mentoring benefited the client?

Feedback from the client for the coach/mentor

(ask your client for feedback on your role as a coach/mentor, you can also use the client feedback sheet for more detail)