

**October 2016**

**Coaching Tip of the Month for Supervisors**

Case Notes and Documentation

**Goals are central to the coaching relationship. There are four main steps to successful goal setting and attainment:**

1. **Develop** for success (use SMART goals)
2. **Implement** skillfully (scaffold appropriately, short-term goals/small steps, use powerful questions)
3. **Document and Monitor** frequently
4. **Celebrate** each accomplishment

In the Intermediate Training, we introduced concepts #1, #2 and #4. In this monthly tip, we highlight the importance of **monitoring frequently**.

**Goal setting is a best practice used in multiple fields and industries.** Take a moment and think about another area of life where goal setting is frequently used. By considering other fields, the importance of monitoring goals in our own field becomes very clear.

***Field: Fitness*.** Have you ever gone to the gym and seen someone carrying around a huge notebook full of their lifts, weights times, eating habits and who knows what else? And why have mobile devises that track fitness accomplishments (i.e. heart rate devises, pedometers, calories burned, etc.) gained so much popularity? Fitness Coaches know that monitoring and tracking progress toward goals is key to success. Why is this?

***Field: Education*.** Most people dislike quizzes, tests, and homework assignments, but schools use these to monitor progress, success and completion. Why is that? Because tracking student’s learning through documentation helps students and teachers assess, monitor and evaluate progress toward achievement of learning goals.

**Monitoring is important to success because it:**

* Helps us understand what is working and what is not.
* Provides motivation toward continuous improvement.
* Keeps us interested in a long term, difficult task.
* Reminds us that we **are** moving towards the goal.
* Can spur increased effort if our monitoring shows we are not doing as well as we would like.

**Monitoring and tracking staff performance:**

As a supervisor, tracking and monitoring the progress of your direct reports is an important part of their professional development and workplace success. Accurate documentation of their strengths, areas for improvement, professional development needs, and goals is necessary in order to know how to best coach them for success.

**Reflect and Plan:**

Take five minutes to consider how you can improve the way you document what’s going on with your staff. Write down at least two changes or enhancements you will make, create a SMART goal and commit to achieving your goal in this area. Keep the goal in a visible location as a reminder of the important role documentation plays in tracking and monitoring goal achievement.