



# Supporting trainees in the workplace - audio script

A guide for work placement employers, coaches and mentors

This is a transcript of the audio guide. Please note that it was written to be spoken rather than read and it retains the emphases and grammatical constructions included for this purpose.

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[www.traineeship-staff-support.co.uk](http://www.traineeship-staff-support.co.uk)

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[www.wbtc-uk.com](http://www.wbtc-uk.com)

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## **Module 1 – Introduction and getting started**

Welcome to this learning package which aims to help you to get the most out of being a supporter, coach and mentor for a young person in the workplace.

Throughout this package the term trainee is used to describe the young person you are working with. Traineeships are a recognised government funded learning programme for young people between the ages of 16 and 24, which are based on a structured work placement.

There are other circumstances in which you may be supporting a young person in your workplace - for example a short period of work experience, an extended internship or an employed apprenticeship. The principles and practice described in these modules can be applied to all these situations.

This learning package will provide you with the knowledge and understanding to be effective in your role. There are also some suggestions for practical activities to help you to put your learning into action.

### **Here are some suggestions for using this learning package**

The package incorporates this audio guide, an accompanying booklet and some template resources.

- The audio guide describes the key principles of supporting a trainee in the workplace and provides the underpinning knowledge that will help you to become a good coach and mentor.
- The booklet contains summaries of the information in the audio guide, exercises to support your learning and activities to help you use what you have learnt.
- The template resources can help you to structure your support for the trainee.

The audio guide is in six modules. It's probably best not to listen to all the modules in one go. Try listening to a module then reading the relevant section of the booklet and doing the exercises. Take some time to think about what you have learnt then try out any suggested activities. When you have tried something, listen to the module again and see if your experience has increased your understanding.

The modules are designed to work as a sequence of learning but each can also be used on its own. You might need support with a particular aspect of the workplace relationship at a particular time, or you might want to refresh your memory about a specific mentoring or coaching skill.

Sometimes the package will be used alongside workshops arranged through a training provider who can guide you through the modules and activities.

However you use this package, we hope it helps you to become more confident in your role and supports you to get the most out of working with a trainee.

## **Getting started**

There are 3 key elements to supporting a successful work placement experience.

- Shared expectations
- A supportive coaching and mentoring relationship  
and
- Planning for progression

These elements are particularly important when the trainee you are supporting is unwaged and using the experience to enhance their prospects of long term paid employment.

Making sure that all the elements are given sufficient attention increases the chances of success for the trainee and satisfaction for you.

This part of the audio guide concentrates on the start of the placement.

When the trainee you are supporting is part of a government funded Traineeship programme there will be a third party involved in the relationship. In this learning package we refer to this third party as the training provider. Some large companies have their own 'in house' training provider but in most cases the Traineeship will be arranged in partnership with a college, a school or a work based learning provider.

The training provider (or the training arm of your company) will be an important source of support for you during the work placement, and they are also a key support for your trainee - so agreeing the roles and responsibilities of each of the three parties is an important first step in the relationship.

All training providers will have their own format for establishing a work placement – and their own forms for recording the agreement between the employer, the trainee and the training provider. An example is given in the resource pack.

The training provider will also provide the relevant paperwork for recording the attendance, activity and learning during the placement. It's helpful for you, the trainee and the training provider to discuss this paperwork together before the placement starts so that everyone is clear about what is expected.

At this point we need to include

### **An important note about the law**

There are legal aspects to consider when placing a trainee in a workplace, such as employer liability insurance and health and safety assurance, and it is the role of the training provider to make sure these things are covered before the placement starts.

There are other important legal aspects of supporting, coaching and mentoring trainees that you need to be aware of. Trainees in the workplace, whether they are employed or unwaged, are protected by the same legislation that applies to all employees.

This means that when you are responsible for a trainee you must ensure that their right to have their individual needs met, according to the whole range of Equal Opportunities legislation, is protected.

Remember that promoting equal opportunities and avoiding discrimination are not just about rules. It is important to be aware of your own prejudices or potential prejudices and think about how you will make sure that your trainee is treated fairly according to their individual needs and circumstances.

You also need to be aware of the Data Protection Act which requires you to think carefully about how you store and process information about your trainee.

There is more detailed information about the legal framework that applies to coaching and mentoring trainees in the booklet. Your training provider will be able to help you if you are concerned about any of these aspects.

Once you are clear about the legal aspects of the relationship, and the practical aspects of roles and responsibilities have been agreed between you, the trainee and the training provider, the real and rewarding work of supporting and developing a young person can begin.

In module 2 we will look at the importance of setting out shared expectations and objectives at the start of the work placement.

## **Module 2 – Shared expectations**

It was mentioned in module one that shared expectations are one of the key aspects of a successful work placement. This module sets out to explain how agreeing the shared expectations will help you to create a positive and productive relationship with the trainee you are supporting.

The relationship between you and your trainee will depend to a certain extent on the nature and length of the placement. It will also be influenced by the size and structure of your organisation.

- You may be a supervisor or team leader who has been given responsibility for supporting a trainee placed in your team by your HR or training department.
- You may not have any supervisory or line management role, and have been offered the opportunity to 'look after' a trainee to develop your own experience.  
or
- you may be an employer running a small business who is taking direct responsibility for a trainee.

Whatever your circumstances are, your relationship with your trainee will pass through a number of stages. It doesn't matter whether you are together for a few days, a number of weeks, several months – or even longer. The length of the stages will vary - but the same stages still apply in the same order.

When you are supporting a trainee in the workplace your role is likely to encompass training and coaching as well as mentoring. In a typical work placement relationship you will go through these stages with your trainee:

- Stage one – gain commitment
- Stage two – get to know each other
- Stage three – work and learn together  
and
- Stage four – evaluate and move on

We will refer to each of these stages as we work through the modules.

First let's look at

### **Gaining commitment**

All work placement programmes should begin with a shared understanding about what the placement is aiming to achieve. It is very important that you are clear about what you can offer the trainee, and what you expect from them in return.

This is particularly important when the ultimate goal of the work placement is to lead to employment. You need to be quite clear about whether there is any possibility of employment within your organisation at the end of the placement. The trainee needs to understand what the chances are, and what they need to demonstrate during the placement to be considered for an interview. If there is not a possibility of employment within your organisation you need to be clear about how you will support the trainee by helping them to develop transferrable skills that will help them to gain employment elsewhere.

If you are not responsible for recruitment, and you have been asked to support a trainee, it's important that you are clear about the commitment your organisation has made so that you can guide and mentor the trainee appropriately.

This aspect of the gaining commitment stage will be supported by the training provider. It is part of their role to ensure that potential trainees are aware of, and committed to working towards, an agreed goal.

As well as clarity about the ultimate goal of the placement, it's useful to have some specific expectations set out at the start.

Each trainee and each placement is individual, so agreeing and setting out what the trainee will experience and learn during the placement is a helpful way of gaining the commitment of both parties. You and your trainee will both know what you are working towards.

Having the objectives and expectations set out in writing also makes it much simpler to monitor and review progress.

There is more about monitoring and reviewing in module 5.

It can be helpful to divide the learning objectives of the placement into two separate sections:

- Developing positive attitudes and behaviours and
- Developing workplace skills

Try the activity in module 2 of the booklet to help you to think about your expectations of your trainee.

Your training provider will support you in setting out learning objectives for the placement. They may have a simple template that can be used. An example is given in the resource pack.

Don't forget that these should be shared expectations and objectives.

You will have a much better idea of the skills your trainee needs to develop than they will, but do take account of what it is they would like to learn and anything that they feel uncomfortable about. You might also need to explain why something your trainee might expect or wish to experience is not available to them, for example for legal or health and safety reasons.

When agreeing behaviours and attitudes you might have to be very specific. For example 'punctuality' means different things to different people. Does, "start at 8.30" mean, "arrive at the door at 8.30"? Or does it mean, "arrive in time to take off your coat, put on your protective equipment and be ready to start working at 8.30"?

Remember that your trainee may not have had any experience of working – what seems obvious to you may not be obvious to them. Avoiding misunderstandings at the beginning will make for a much smoother start to the placement.

One way that you can support your trainee to understand the rules and expectations of your organisation is to give them a company induction at the start of the placement. All new employees should receive an induction that covers the legal obligations of the employer, such as health and safety. Trainees are entitled to the same. Including expectations such as dress code, use of personal mobile phones and acceptable language in this induction is a way of introducing the 'unwritten' rules without sounding negative.

Some training providers ask trainees to complete a template that records the key points from their induction and keep it in their learning record. As well as providing evidence for the training provider that the legal aspects of induction have been covered, the template can help you to remember what you need to tell the trainee about expectations. The 'unwritten rules' then become written down by the trainee - and you both have a reference point if any issues arise during the placement.

An example of a work placement induction record is included in the resource pack.

In summary - Stage one of the relationship is when you agree what the purpose of the placement is, what you and your trainee hope to achieve and what you can expect from each other. This stage is often completed with the support of a training provider before the placement starts.

Now we will look at stage two

### **Getting to know each other**

As in any relationship, understanding what makes the other person 'tick' is the key to getting the best out of your relationship with your trainee. Your trainee also needs to understand your preferred ways of working.

You may have interviewed your trainee and already formed a first impression. You may have been introduced after the formal paperwork and the placement objectives have been completed by someone else.

Whatever the circumstances, there are some helpful things you can do when the placement starts to ensure that the support, coaching and mentoring that you provide is rewarding for you, meets the needs of your trainee and achieves the objectives of the placement.



### **Find out about their background, experience and aspirations**

Take some time to find out about your trainee and what they bring to the placement. If you interviewed or selected them you are likely to have a copy of their c.v. If you didn't, ask if you can see it. Then think about what you would write in your own c.v. – and what you would leave out!

Trainees often have other learning commitments alongside their work placement. Find out whether they are doing any qualifications related to your business. You may be able to give them the opportunity to put theory into practice.

Taking account of previous learning experiences, levels of achievement, any barriers they face and what their interests and aspirations are will help you to choose a coaching and mentoring approach that works best for you both.

### **Tell them about your background and experience**

If there is something in your experience that you can relate to theirs then use it to build empathy. You don't have to share anything personal, and neither do they. One thing you will almost definitely have in common is an interest in the business sector that you are working in.

Try not to be put off if your trainee takes a while to become relaxed and confident when talking with you – they may well be nervous at first. Think back to how you felt on your first day in your first job.

### **Next – let's consider learning styles**

It is important to remember that your trainee is with you to learn. While they are doing their learning they will also be contributing to your organisation, but if they don't feel that they are learning something new they will soon become disenchanted with the experience.

When you are coaching your trainee and providing learning experiences, remember that people like to learn in different ways.

If you have been through a company training programme, or been an apprentice, or done any management training, you may have completed a 'learning styles' exercise and found out how you learn best. If you haven't – or if it was a long time ago – you might like to try the exercise that is provided in the resource pack.

Your trainee may well have completed a learning styles exercise with the training provider who arranged the placement. One way of getting to know each other is for you and your trainee to compare results.

Most people develop the ability to use different learning styles in different situations, but knowing what is most natural for your trainee will help you to predict which aspects of the placement will need most support. Knowing your own preferred style will help you to predict where you might need to adapt and take a different approach.

If you are naturally a reviewer, you might find the 'feet first' approach of an explorer alarming.

If you are an explorer, you might not naturally provide the specific instructions that a trainee who is a practitioner finds helpful.

Talking about how you both learn, and how we all have to adapt to other people's styles when we are at work, is a valuable activity either at the start of the placement or later on.

The next three modules cover Stage 3 of the relationship – working and learning together. This is the stage that makes up the largest part of a work placement. Developing your coaching and mentoring skills will help you to make this critical stage successful for both you and your trainee.

### **Module 3 -Introduction to coaching and mentoring**

In module 2 we described the stages of a work placement relationship, and we covered the important stages of gaining commitment and getting to know each other.

In this module we concentrate on stage 3 of the relationship – working and learning together.

Take note of the word together. As you support your trainee they will be learning a great deal about themselves, and developing the skills that will help them to succeed. You will also be learning about your own strengths and development needs, and improving your coaching and mentoring skills.

#### **So what do we mean by "coaching" and "mentoring"?**

It's easy to be confused by these two terms. They are used in a wide range of contexts – 'sports coach', 'life coach', 'business mentor', 'learning mentor' are just some of the more commonly heard. There are countless definitions, some of which include the same words to describe both activities. There are also a number of published theories and models which set out prescribed processes for being a successful coach or mentor.

In this module we aim to explore what coaching and mentoring actually involve in the particular context of supporting a trainee in the workplace.

We will help you to find out whether your role is as a coach, a mentor – or a combination of both,

and we will support you to examine your own abilities and recognise your development needs.

To help you to recognise how coaching and mentoring fit into your role it is useful to look at the differences and similarities between them.

### First the differences

<b>The coach</b> is mainly concerned with the teaching or development of particular skills	<b>Whereas the mentor</b> is more concerned with supporting the trainee to use their skills to start or develop their career
<b>The coach</b> is often a specialist practitioner or experienced in the skills the trainee needs or wants to learn	<b>Whereas the mentor</b> specialises in helping someone make decisions about their learning, and to reflect on their progress and development
<b>The coach</b> seeks to build the trainee’s confidence and competence in a particular activity	<b>Whereas the mentor</b> seeks to build the trainee’s confidence in themselves
<b>The coach</b> explores how the trainee’s previous knowledge and achievement can support their development	<b>Whereas the mentor</b> explores how the trainee’s attitudes and behaviours affect their development
<b>Coaching</b> can be a short term role – maybe for just one task or skill. The trainee may have several coaches during the placement	<b>Whereas mentoring</b> supports the trainee throughout the placement

### Now let’s look at the similarities

- Both coaches and mentors support the learning process
- Coaches and mentors use many of the same skills to help their trainees make decisions and take appropriate action
- Coaches and mentors should both be role models for a trainee
- Successful coaches and mentors both build relationships based on trust and openness
- Instead of just telling someone what to do and how to do it, coaches and mentors both encourage trainees to take responsibility for their own development

The overall aim of good coaching and mentoring is to help someone build on their strengths, overcome their weaknesses and realise their potential.

**Now that you know what a coach does, and what a mentor does – think about which description best fits your role?**

A trainee in the workplace needs both a coach and a mentor.

Sometimes the roles are fulfilled by different people. In a large organisation a trainee can have a number of coaches who help them to acquire different skills, and a workplace mentor who brings the whole experience together.

In a small organisation it's more common for the coach and mentor roles to be rolled into one.

Don't forget that there is a third party in the work placement agreement – your training provider. A key part of their role is to support and encourage the trainee to make the most of their placement - so the training provider contributes to the mentoring role.

As well as being an extra mentor for the trainee, they can also support you.

They will know about any change in the trainee's personal circumstances that might affect their attendance or attitude - and they will know how the trainee is progressing with any qualifications they are doing alongside the work placement.

Your training provider can be particularly helpful if there are any difficulties that arise during the placement. They have an interest in making sure that the host employers, as well as the trainees have a positive experience.

You will have agreed a review schedule with your training provider at the start of the placement – but don't wait for the agreed dates if you need support or advice. Get in touch.

### **At the start of this module we said we would look at coaching and mentoring in the particular context of supporting a trainee in the workplace**

To help us do this, let's return to the objectives of the work placement and the shared expectations described in module 2.

We divided the objectives into two separate sections

- Developing positive attitudes and behaviours - and -
- Developing workplace skills

Developing workplace skills is about developing practical experience and competence. These objectives are about what your trainee can demonstrate and do.

Developing positive attitudes and behaviours is about supporting the development of what are sometimes called 'soft skills' or 'employability skills'. These objectives are about how your trainee approaches their work.

When thinking about how you will coach or mentor your trainee, you might find it helpful to link the workplace skills to a coaching approach, and the attitudes and behaviours to a mentoring approach.

The next section is about -

### **Coaching and mentoring skills**

We have looked at what coaches and mentors do – and noted that they both use many of the same skills to help someone learn and develop. Now let's look at some of the skills and personal qualities that successful coaches and mentors use in their roles.

To be a good workplace coach or mentor you need to develop skills in:

- Setting clear expectations
- Engaging and motivating people
- Observation
- Active listening
- Asking effective questions
- Praising good performance
- Challenging poor performance
- Giving constructive feedback  
and
- Reflecting on and learning from your experience

Don't be put off or alarmed by this long list – you probably already have many of these skills and use them naturally all the time. You just don't think of what you are doing as a skill.

To find out where you are now in your development as a coach or mentor, try the 'where are you starting from?' exercise in the resource pack.

If you are less confident with some skills than others, modules 4 and 5 will help.

The next list is about personal qualities that good coaches and mentors display when they are working with young trainees. This doesn't mean that you have to show these qualities all the time to be able to coach or mentor successfully – just when you are coaching or mentoring.

The list of skills we looked at earlier comes from recognised good practice in coaching and mentoring. This list of personal qualities comes directly from young people who have had a work placement. Here's what they said they wanted most:

- 'Be interested in me'
- 'Be enthusiastic about having me'
- 'Be fair'
- 'Be consistent'
- 'Be kind'
- 'Be patient' - and
- 'Have a sense of humour'

Importantly – alongside these personal qualities – the most often mentioned request from young trainees was “let me do things!”

In recognition of this request, module 4, which concentrates on particular coaching and mentoring skills, starts with some suggestions for engaging your trainee and keeping them motivated.

Before you move on to module 4, think about what you have learned from listening to this one:

Are you naturally more of a coach or more of a mentor?

Which do you need to be in the role you have taken on or been given?

What skills do you already have and what do you need to develop?

Think about someone who has helped you to develop in your career or in an aspect of your leisure or personal life. What was it about them that helped you?

## **Module 4 -Developing your coaching and mentoring skills**

In this module we will look at how you can develop your skills as a coach and a mentor.

Think back to the information and exercises from module 3.

You have discovered whether your role is more of a coaching role, or more of a mentoring role – or a combination of both.

You have explored your existing skills – and found out which skills you need to develop.

You have thought about the personal qualities which young people say are helpful in a coach or mentor.

Now we are going to look at these skills and qualities in more detail.

First we will look at

### **Engaging and motivating people**

Remember what the trainees said:

- 'Be interested in me'
  - 'Be enthusiastic about having me'
- and

'let me do things!'

These are important factors in engaging and motivating young people.

We have already covered some of the things that help to engage your trainee in module 2.

If you have been through the process of setting out shared expectations and agreeing some learning objectives at the start of the placement you will be well on the way to having a trainee that is engaged and motivated. We all work better when we know what we are working towards. To keep the motivation going, don't forget to re-visit the learning objectives regularly and review progress against them.

When you take the time to get to know your trainee, find out what interests them and what their aspirations are and how they learn best - you are showing that you are interested in developing them and supporting them – and not just supervising them.

Remember that people show enthusiasm in different ways. This applies to trainees as well as to coaches and mentors.

When we asked the trainees what they meant when they said, "be enthusiastic about having me", what they really meant was, "don't act as if having me around is just giving you extra work to do".

When young people take on a work placement, especially if it is unwaged, they are expecting to be kept busy with useful tasks that help them to learn something.

Observing and shadowing are useful learning tools, but try to include some active tasks from the start.

It's important not to rush a trainee into doing something they are not ready for – this may lead to anxiety, fear of failure - and even non-attendance as a consequence.

However, it's equally important to not to be overly restrictive in the activities that you allow the trainee to experience. They may show a talent or aptitude that they were not aware of before. The more tasks you can support them to do, the more they will be contributing to your business.

"Boredom" is one of the most common reasons that young people give for not enjoying their work placement. We all know that there are some aspects of our working life that we

find exciting and engaging - and others that are necessary, but routine and uninteresting. A young person who has not experienced work before does not necessarily know this. Explaining how the routine tasks are vital to the running of the business will help – but try to keep a balance between the routine and the interesting, and not just give the trainee the routine tasks all the time.

One way that you can engage the interest of a trainee when their main role is largely routine is to give them a project of their own to be responsible for. The nature and scope of the project will be dependent on a range of factors, not least the level of confidence and competence that the trainee has reached. It can be a short term or longer term activity and it can directly contribute to the business or be purely a development activity for the trainee. The key factor is that that the trainee can say, "I was responsible for this".

If you are finding it hard to think of interesting things for your trainee to do, or pressure on your own time means you can give them less attention than you would like during a busy work period, talk to your training provider. They may be able to suggest some research or 'finding out' activities that the trainee can do by themselves that will help develop their understanding of your business without taking up a lot of your time.

There is an example of a template for recording a work based project in the resource pack.

It can also help to have a list of 'things to do when there's nothing to do'. If your trainee knows what would be helpful things to be getting on with when there is no one actively guiding or instructing them, they will be contributing to the team and they will feel useful and valued. They can also demonstrate their initiative by deciding for themselves what they should do.

Knowing when to relax the supervision and let a young trainee do things on their own can be hard - and you may have to take a calculated risk. Following the 'plan - do - review' steps that are explained in the next module can help you and the trainee to agree when the time is right. The satisfaction that results from your trainee being able to say, "I did that", is just as important for you as it is for the young person.

### **Let's think some more about motivation.**

Motivation is an internal force – it's not something that can be imposed or taught. As a coach or mentor your role is to arrange things so that your learners will feel motivated.

Think of the classic picture of a person trying to make a donkey move - the one that involves a stick and a carrot. Classic motivation theory suggests that the donkey will only move if you offer it a carrot or threaten to hit it with a stick. The problem with this theory is that unless this donkey particularly likes carrots, or is particularly worried by the stick, it still won't move.



One theory suggests that there are five key motivating factors – achievement, approval, curiosity, acquisitiveness, and anxiety.

Try to find out what motivates your trainee most.

- If it's achievement – set lots of small goals that can be achieved quickly rather than one long term goal.
- If it's approval – make sure you recognise and praise even small achievements regularly.
- If they are motivated by curiosity – try to find tasks that will let them find things out for themselves, or ask them to find something out for you.
- If they are motivated by acquisitiveness – the desire for money or possessions – you will need to remind them that learning and experience lead to better skills and improved job prospects.

The final factor is more challenging –

- Some people's main motivating factor is anxiety. This motivates people not to do things due to fear of failure. These people need lots of support and encouragement. They often respond well to knowing in advance what they will be asked to do (so they don't worry about being given a task that is unfamiliar) and being reassured that if they don't get it right first time it doesn't matter. It is with these young people in particular that the quality of patience is most needed.

Young people often find it hard to describe what motivates them. It will be through using your observation, listening and questioning skills that you get a real insight.

These skills are covered next.

**This part of the module looks at the skills of observation, active listening and effective questioning.**

### **First let's look at observation**

Observing a trainee in a coaching and mentoring context is more than just watching them perform a task and assessing their competence.

Assessing competence is an important aspect of supporting learning – and you will use your observation to review progress against the skills objectives that you have agreed - but if you

can sometimes step back from watching the task, and concentrate on observing the person, you can gain valuable insights into their motivation and confidence.

Young people in a work placement are often reluctant to say if there is something they are uncomfortable with or anxious about. Observing their body language can prompt you to ask appropriate questions about how they are feeling.

Body language is a complex subject – and as a visual language it's not easily described in words.

There are, however, some things you can look out for:

If your trainee doesn't look at the person who is speaking directly to them, it could be shyness - or rudeness – or it could be that they are uncomfortable with what is being said.

If they keep themselves at a distance from others unless specifically asked to join a group or a conversation – is this lack of interest or are they feeling left out or intimidated?

When doing a task on their own – do they have an alert posture that suggests that they are engaged and interested – or are their shoulders slouched and their head down. If the latter, could this be boredom - or could it be anxiety?

The important thing to remember is that someone's body language is a clue as to how they are feeling. The important thing for a coach or mentor to do is to look for the clues - and then ask appropriate questions.

We all send out unintended signals sometimes. Young people have less experience of how their body language gives an impression about them.

Sometimes you might have to help your trainee to understand how to use positive body language in the workplace. This is where you can be an effective role model.

Don't forget to take account of your own body language when you are with your trainee.

When your trainee is talking to you - aim for attentive and interested. Always looking at the person who is talking to you is a good start.

When giving negative feedback - or challenging negative behaviours - you are aiming for body language that is assertive without being aggressive. Be careful about personal space. Standing or sitting too close in a challenge situation can make the other person feel threatened – even if that is not your intention.

Be aware that people from some backgrounds are less comfortable with direct eye contact than others, and there are some gestures and postures that can be interpreted differently in different cultures. If you and your trainee are from different ethnic communities or different cultural or social backgrounds, you will need to take some time to make sure that neither is unintentionally causing offence or making the other uncomfortable – and as the role model it is your responsibility to take the lead.

### **The next skill we will look at is active listening**

Listening is possibly the most important skill that you will use in coaching and mentoring. When you actively listen to what people say you show them that you value their thoughts and ideas. If you train yourself to listen actively rather than passively you will be able to pick out the key messages that someone is giving you and respond to them.

Unfortunately most of us are not naturally good listeners. Our minds wander, we hear part of the message and jump to conclusions – or we interrupt and make assumptions about what the speaker was going to say next.

We have all experienced an occasion where we needed to get the answer to a specific question – and the person we asked told us lots of other things but never actually answered our main question. This might be a useful tactic for politicians being interviewed by the media - but it's not a helpful approach in coaching and mentoring.

Sometimes people who have something difficult but important to say 'hide' the difficult statement among lots of less important conversation. Actively listening to your trainee will help you to pick out the important messages.

### **Here are some techniques that can help your listening to become more active:**

- Be prepared to summarise the main points that someone makes. Sometimes they will have made a lot of points without much pausing – especially if they are nervous. If you can say something like 'let me just make sure that I have taken all that in' - and then list the main points you heard – it shows the speaker that you have really listened.
- Try reflecting your understanding of what has been said back to the speaker. This is helpful when it's the emotional overtones of the statement that are important rather than the words themselves. You can use phrases like 'so what you seem to be saying is that you are angry about what happened yesterday'. This gives the speaker a chance to correct your understanding. For example they might respond by saying 'not angry exactly – more disappointed'.
- Prompts can be helpful and can avoid a threatening long pause. If you think the speaker has started to say something important, but lost their thread or lost their nerve, you can prompt with a gentle 'go on, I'm listening' to encourage them to continue.
- The little non word noises like 'uh-huh' and 'mmm' that we all use to indicate that we are listening to someone are helpful – but only if we really are listening. If your trainee assumes you have heard and understood something important that they have told you – and you weren't really listening – it can cause problems. They are unlikely, at least at the start of the relationship, to be confident enough to check that

you have heard them properly. It can then result in an unhelpful 'but I told you' scenario.

However under developed your own active listening skills are – they will almost certainly be more advanced than your trainee's! Checking whether they have taken in what you have said to them is sometimes difficult. A simple closed question such as 'did you get that?' will more than likely result in a 'yes' answer – especially if they weren't really listening. Active listening is a learning skill that your trainee needs to develop – and if you model the techniques when you are listening to them they will get the idea.

There is an exercise in the booklet that can help you practice your active listening skills.

The third skill we are looking at in this module is

### **Effective questioning**

Questions are often divided into two categories – closed questions and open questions.

Closed questions are used to draw out specific information or facts.

Questions like 'how long did it take you to do that?' are closed because they are requesting specific information.

Questions like 'did you understand that?' are closed because they indicate that a 'yes' or 'no' answer is needed

Closed questions are useful and necessary – they can deal with a subject quickly and allow the discussion to move on. A closed question puts the questioner firmly in control of the discussion. This can be useful when you need to be in control - but remember that coaching and mentoring are not about control – they are about support and development.

Closed questions rarely invite or encourage people to express an opinion or develop an idea. Open questions, on the other hand, allow the other person to take a lead in the discussion.

Let's try turning the closed questions into open questions:

Instead of asking 'how long did it take you to do that?' try asking 'how do you think we could get this done more quickly?' This makes your trainee think about whether they are working efficiently - or maybe even whether the company processes are efficient – and allows them to come up with an idea to improve things.

Instead of asking 'did you understand that?' try asking 'which parts of this did you find most difficult?' This helps you to find out much more about how your trainee learns – and how effective your coaching is.

Try to avoid the 'accusatory why'. A question such as 'why did you paint your house purple?' can carry an underlying message that purple is not an appropriate colour. Saying 'tell me why you painted your house purple' indicates that you are not judging – just questioning.

If your trainee is demonstrating attitudes or behaviours that are not appropriate, try asking something like 'how do you think people feel when you do that?'

Asking effective questions can make people reflect on their actions and help them gain a better understanding of themselves and others. This is one of the main purposes of mentoring.

In this module we have covered the important skills of observation, active listening and effective questioning.

In the next module we look at monitoring and review, praise and challenge, and giving constructive feedback.

## **Module 5 – Effective monitoring and review**

In module 4 we looked at developing your skills of observation, active listening and effective questioning.

In this module we will look at the skills needed for effective monitoring and review.

Praising good performance, challenging poor performance and giving constructive feedback are all part of the monitoring and review process.

You will remember that we described the stages of the relationship between you and your trainee.

In stage one – gaining commitment – you agreed the purpose of the work placement and set out shared objectives.

In stage two – getting to know each other – you looked at ways to achieve the objectives.

Stage three – working and learning together – is where you use your coaching and mentoring skills to help your trainee develop. Monitoring and review are key components of this stage.

Remember that while you are developing your trainee you are also developing your own coaching and mentoring skills – so don't forget to monitor and review how you are doing as well.

**Let's discuss the main aspects of the monitoring and review process as they apply to trainees in the workplace.**

When your trainee is part of a formal programme arranged through a training provider, a review schedule will normally have been agreed at the start of the placement. The frequency and detail of these formal reviews will vary according to the planned length of the placement - and each training provider will have their own format for recording them.

These formal reviews with the training provider are important as they capture and record the work placement as the key component of the trainees learning programme. However, the training provider can only record what you and your trainee tell them. They are not present in the workplace to observe progress with developing skills - and they don't see the trainee demonstrating attitudes and behaviours at work

An important part of your role as coach or mentor is to monitor and review progress towards the objectives you agreed with the trainee.

Monitoring refers to the collection of information about how your trainee is performing.

Reviewing helps you and your trainee to reflect on how the placement is going, identify achievements, address areas for improvement and plan for next steps.

The frequency and content of the reviews will vary depending on whether your role is more of a coaching role, more of a mentoring role, or a combination of both.

In your role as a coach, much of the monitoring and reviewing will occur naturally as part of the working together process so it needn't take a lot of additional time. The responsibility for recording 'what I have done' and 'what I have learnt' normally rests with the trainee. Training providers will give the trainee guidance on how to record their activity and learning – and encourage them to do it.

A simple example of a work placement activity record is included in the resource pack.

As a coach you might find it useful to ask your trainee what they are going to put in their activity record – they might need some help to describe what it is they have learnt. Talking to them about their learning, as well as their activity, can also help you to assess how well your coaching style is working.

In your role as a mentor, you will need to set aside some time to have progress discussions with your trainee when you can have some privacy and you are not distracted by other demands.

If you are both coach and mentor – and you work closely with your trainee on a daily basis – the monitoring aspect of the process is straightforward.

If your trainee is working with and being coached by other people, you will need to get their input before having your review discussion with the trainee.

Remember, although some form of recording is necessary to capture progress, it is the discussion that is the important thing.

If you have used a simple template to set out the objectives for developing workplace skills and developing positive attitudes and behaviours - like the examples in the resource pack - then recording progress towards the objectives is quick and easy.

### **Now let's take a moment to look at different types of review**

During the working and learning together phase of your relationship, the reviews that you do with your trainee are formative reviews. This is part of a continuous process that ensures you offer your trainee systematic and consistent support.

One way of structuring this support is to follow the classic learning cycle of

'Plan.....Do.....Review'

This cycle can be applied to a single skills coaching session, or to the development of particular behaviours, or to a longer period of varied activities.

### **Let's apply it to a short coaching session:**

An office based trainee is asked to photocopy and assemble sets of papers for a meeting.

First – plan.

The coach and trainee agree a suitable time for the coach to show the trainee how to use the functions of the photocopier.

Next – do.

The coach demonstrates how to do the task - then supports and observes the trainee as they have a go.

Then – review.

The coach and trainee discuss how confident the trainee feels about the task and plan the next steps. This could be to have another session when they do the task together, or for the trainee to do the next set with supervision but without prompting, or for the trainee do the next set of papers unsupervised. In this way the review forms the next plan.

**Now let's try applying the 'plan – do – review' model to a mentoring approach:**

It is the end of week two of the placement and you are having a 'how's it going?' chat with your trainee. You have observed your trainee during their initial days on placement and you have asked other people for their observations.

First – the review

Using your effective questioning and active listening skills you ask the trainee how they are feeling about the placement so far and the progress they are making. You refer back to the objectives you agreed at the start. You give them feedback from your own observations and any input from colleagues. You praise their achievements and highlight any particular areas of concern. You encourage them to reflect on their own progress and draw conclusions.

Next – the plan

You and your trainee agree how to build on any successes and achievements by arranging some new or extended activities over the next two weeks. You agree some steps that can be taken to address any areas of concern, and agree when you will be monitoring progress against these areas.

Then - do

You try hard to arrange the things you committed to (and explain why you can't if it proves impossible). Your trainee makes an effort to improve any areas of concern that are within their control. At the agreed time you review again - and make the next plan.

Note that in the second example we started the cycle at the 'review'. We could equally start at the 'do' stage. In many businesses, activities often arise that are not planned in advance.

Indeed for some 'explorer' learners, who respond well to 'jumping in feet first', it might occasionally be appropriate to let them 'give it a go' then 'review how it went' then 'plan how to make it better next time'.

This 'feet first' approach is not recommended for trainee heart surgeons – but as a coach and mentor you will be using the information from formative reviews to adapt your approach to the learning style of your trainee whenever possible - within the constraints of your business.



**The second type of review that you will be involved with is the summative review.**

This is the final review that takes place at the end of the work placement. A summative review also takes account of the 'plan – do – review' model - it refers back to the original objectives for the placement, looks at what was done to meet those objectives and records how well the objectives were met. However, a summative review is the end of the cycle.

There is more about the summative review and the 'moving on' stage of your relationship with your trainee in the final module.

**Now let's look more closely at the skills of praise and challenge and giving constructive feedback which are key aspects of effective monitoring and review:**

While we are looking at these skills, let's remember the personal qualities that trainees asked for in their coaches and mentors:

- 'Be fair'
- 'Be consistent'

and

- 'Be kind'

When you are giving praise, challenging unproductive behaviour, or giving feedback in a formal review it is helpful to remember these - and keep the perspective of the young trainee in mind.

**First - let's look at praise:**

We all respond well to praise - particularly when it comes from someone we respect or admire. However, if the 'well done' appears to be given indiscriminately – even when we know we have not done something particularly well – it soon loses any impact.

Approval is the key motivating factor for some people – the main reason that they strive to perform well is to gain the approval of others. For these people the frequent 'well done' is important, but a coach or mentor needs to make sure that it is real achievements that are being praised – even if they are lots of small ones.

The key to effective praise – praise that reinforces and encourages good performance – is to be specific about what you are praising.

This can be praise for doing something unexpected – for example - “That was really good – I didn’t realise that you had picked up how to process an order so quickly”.

It can be praise for demonstrating a learning objective – for example – “You handled that customer really well. You listened carefully, found out what the problem was, and passed it on to the person that could help”.

Importantly with young trainees, it should also be praise for doing the expected. Remember that the workplace attitudes and behaviours that were agreed at the start of the placement are obvious to you – but not so obvious to your trainee. So praise like - “it’s great that you are always on time and keen to get started” - is very important to a young person in their first workplace.

Praise should be given when it is due – ideally as soon as you notice the praiseworthy act or attitude. But it should also be remembered, and taken notice of, in more formal feedback and reviews.

One of the most satisfying and motivating things that your trainee can hear from you in their reviews is that someone else has praised them. As a coach – if your trainee is doing well, tell their mentor and supervisor. As a mentor – if your trainee is doing well, tell their training provider. As a coach, mentor or supervisor – tell your trainee if you have had positive feedback from someone else.

### **Now let’s look at challenge:**

There may be occasions during your working relationship with your trainee when you need to address behaviours or attitudes that are unproductive. A challenge is not a ‘telling off’. It doesn’t just criticise someone for doing something wrong. A challenge is a way of helping people to recognise that their behaviour or attitude is unhelpful - and supporting them to move on.

A challenge situation can be a difficult experience for the coach or mentor as well as for the trainee. However challenge should not be avoided. When you are supporting a young person in the workplace it is an important part of your role to help them to recognise and demonstrate appropriate workplace behaviour.

Here are some suggestions for challenging effectively:

- Decide exactly what it is that you want to challenge – try to be specific. Saying, “I don’t like your attitude” is likely to put someone on the defensive. Saying, “Your timekeeping is becoming an issue – you are always late back from your lunch break” is likely to be more productive.
- Rehearse what you want to say - your aim is to get the person to recognise what the problem is, and why it is a problem.

- Challenge the behaviour – not the person. For example -instead of saying, “You’re lazy!” – try - “It has been noticed that you work really slowly and this is causing a problem within the team”.
- Allow the other person to reflect on why they are being challenged – sometimes it can help to ask questions such as, “why do you think people get cross when you do that?”
- Try not to leave a challenge situation without agreeing what should be done about it. Try to make this a positive closure. For example – instead of finishing with, “So I need you to stop being late!” – try - “So we are agreed that you will be ready to start work at 8.30 from now on”.

Praising and challenging are ongoing aspects of your role in supporting a trainee in the workplace. They should not be ‘saved up’ for review meetings.

But if you are finding that you feel the need to challenge your trainee more than you want to praise them – you might find it helpful to get support from a third party. Don’t forget that the training provider that arranged the work placement is there to support you as well as to support the trainee.

Asking to have a review with the training provider present will give you the opportunity to give feedback in a structured meeting.

### **The final part of this module looks at the principles of giving constructive feedback**

Constructive feedback in a work placement situation is a way of telling trainees what they are doing well – and what is not so successful. It focusses on the shared expectations that were agreed at the start of the placement. It should be evidence based and it does not include making value judgements. Remember the qualities of a mentor that are valued by trainees – be fair, be consistent and be kind.

Here are some guidelines for making your feedback structured and constructive:

- Be prepared – remember the skills, behaviours and attitudes that were agreed at the start of the placement. It is helpful to have the agreement with you to refer to.
- Start with the positive – give specific examples of where your trainee has done well.

- Choose your words carefully - if you need to give negative feedback, try describing it as 'areas for improvement'.
- Focus on the behaviour not the person – if feedback is negative it is even more important to be specific and to give examples.

Don't forget to

- Leave space for your trainee to respond to the feedback – both positive and negative – and observe and listen actively to their responses. This will help you to know whether they have 'taken in' what you have said.
- Summarise their responses and reflect them back. This tells your trainee that you are listening to them. It will also help you to be sure that you have read their non-verbal signals correctly.

And lastly -

- Conclude the feedback with a 'moving on' statement. If the feedback is mostly positive it can be something like, "So you need to work on remembering not to swear - but overall you are doing really well". If the feedback is mostly negative it can be something like, "So there are some things you need to work on - but you are clear what they are and we can move forward from here".

Remember that feedback is one part of the 'plan – do – review' cycle. It is only helpful if it leads to positive action.

A formal review should record the progress made, make note of the feedback given and set some agreed targets to work towards.

Now that we have explored the skills you will use during the working and learning together stage of your relationship with your trainee, the final module in this series – module 6 – looks at what happens at the end of the work placement.

## **Module 6 – Moving on**

In this module we look at the final stages of your support for your trainee.

Throughout the work placement relationship you have kept in mind the purpose of the placement and the shared expectations that were established at the start. As you approach the end of the placement it is important to think about how you will support your trainee to take the next step into employment or further training.

You will need to consider:

- the information, advice and support you can offer
- how the final review of the placement will support your trainee to move on and
- the type of reference or testimonial that is appropriate.

Remember that there is another person that has a key role to play at this stage.

Your training provider will have a process for the end of a work placement and they will support both you and the trainee to make it a positive ending.

They will liaise with you about any opportunities for employment in your organisation. They will support the trainee to understand all the progression options and apply. They will support you with an exit interview and testimonial if appropriate, and they will conduct a final review and evaluation of the placement with you and the trainee.

**Before we look at the process in detail, let's explore the information, advice and support you can offer.**

You are an excellent source of information about what your company or your employment sector can offer in terms of career progression and reward. You also know about any potentially less attractive features that the trainee may not have been exposed to during their placement – such as long hours, fixed holidays or shift work. Remember that one of the purposes of a work placement is to help the trainee to decide whether they want to work in your business sector. If they have only seen part of the picture you can help them to have a better understanding of the reality.

If they are not sure what they want to do next, for example whether they should consider further training before they go into full time employment, you can help them to think through the options – and you might be able to refer them to someone with specialist knowledge who can help.

Remember that advice involves helping someone to come to their own decisions – not telling them what would be best for them.

Part of your support role can be as an advocate for your trainee. If you hear of opportunities that could help them to gain extra knowledge or experience you can put their name forward. You might have the contacts to arrange these opportunities yourself. Some time in another department, or joining a company training day, or even a visit to another company in your sector can add immensely to your trainee's experience and confidence. If your company is not able to offer employment – you might even be able to recommend your trainee to someone else.

Providing information, giving advice, referring to someone else for guidance and advocating for your trainee can all be done at any stage during the placement. As you approach the planned end - think about whether any of these could help your trainee to move on successfully.

### **Next we will look at the final review**

You will have been reviewing progress with your trainee throughout the placement. Some reviews will have been informal and others will have been more formal, sometimes with the training provider involved. The number of recorded formal reviews will depend on the length of the placement.

At the end of the placement it is important to have a final review. This type of review is sometimes called the summative review. There will be a written record of this review that 'sums up' and evaluates the placement.

Your training provider will usually have a standard format for recording a final review.

It's helpful to do some planning for this important discussion. You and your trainee have invested a lot of time and effort in the work placement and it's important that this is recognised in the final review report.

You will want to think back to the objectives that were agreed at the start of the placement - and whether they have been achieved.

You will want to remember what your trainee has experienced and how they have been supported.....

and you will want to think about what went well – and whether there was anything that was less successful.

Encourage your trainee to think about the same things. Your training provider will also help them to do this.

If your trainee has been completing a placement diary or activity record, it will be easier to remember what they have experienced.

If you have been using a checklist with your trainee to record the workplace skills they have developed, and the attitudes and behaviours they have demonstrated, it will be easier to assess how well the objectives have been met.

It is important that the final review is an honest evaluation of the placement. Your trainee will use it to update their c.v. and prepare for interviews - and you will use it to inform any reference or testimonial that you provide. But don't forget the list of desirable qualities from the trainees – 'be kind'.

If the placement has gone well, the final review will be an easy and enjoyable experience for everyone.

If it has not gone well, and is ending earlier than planned, it will be more difficult. By using the techniques for giving constructive feedback that we looked at in module 5 you can support the trainee to move forward – even if it's not in the direction they were hoping for.

**Let's consider a number of scenarios for the end of a work placement:**

First we need to return to the shared expectations that were established during the 'gaining commitment' stage of your relationship.

The way that you prepare for and handle the end of the placement will depend on whether there was any possibility of a successful placement leading to permanent employment within your organisation.

If you are responsible for recruitment you will know whether there are any openings that would be appropriate for your trainee. If you are not, it is important that you liaise with your manager or H.R. department and get their advice. In either case it is important to think about the progression opportunities well before the planned end date for the placement.

In each of the following scenarios there are a number of steps to be taken to end a placement in a positive way. Don't forget that your training provider is there to support you - whatever the outcome.

**First - let's look at a placement that ends earlier than planned.**

It is still important to review the placement and record the outcome. How this happens will depend on the reason for the early ending.

If you and your trainee are parting by mutual agreement, and are on speaking terms, you can have a joint final review with the training provider.

If you are prepared to provide a reference for the trainee – perhaps to help them secure a more suitable placement, you have the opportunity to let them know.

If there has been a breakdown in your relationship with your trainee, or either of you is uncomfortable having a joint meeting, then your training provider may arrange separate reviews. You will all have the opportunity to reflect on what went wrong and why, and learn from the experience.

**Now let's look at a placement that has been successful - but with no opportunity for employment within your organisation.**

The final review will act as an exit interview. It is an opportunity for you and your trainee to formally recognise the things that have been achieved and the progress that has been made.

It also provides a record that the trainee can use when updating their C.V. and applying for jobs in other organisations. Having the final review discussion will help you to write a testimonial to give to the trainee - and the record of the review will give you something to refer back to if you are asked to provide a reference in the future.

If you and the trainee want to keep in touch on a professional level you can agree how you will do this.

If you are prepared to host another trainee you can agree with the training provider how you would like to be contacted and when.

This is the opportunity for all parties involved to say an official 'thank you'.

**Next let's consider what happens when there is a suitable opening in your organisation and you would like your trainee to apply.**

In this case it is important that you make your trainee, and the training provider, aware of the opportunity as soon as possible. It's important that they have all the relevant information such as the role description, the application process and the deadline. Sometimes these details can be missed when a trainee is working within an organisation but not formally connected to the HR processes.

If it is a competitive recruitment process it's very important that the trainee knows this. Don't raise their expectations unduly. They will need to prepare for the application and interview as thoroughly as the other candidates.

If you are their mentor, and you are not responsible for recruitment, you can help. Having a review meeting with the training provider present before they are interviewed will provide your trainee with lots of support.

If you are responsible for recruitment, and there is more than one candidate, it is more difficult for you to help your trainee prepare. This is where you ask the training provider to step in. In this case it might be better to have the final placement review after the result of the selection.

If your trainee is successful, the final placement review does not need to be as detailed – and you won't need to provide a testimonial.

If they are not successful this time then you can use the final review to recognise their achievements and support their progression in the same way as in the previous scenario.



**The final scenario is the easiest.**

The work placement has been positive. You have a suitable opening and your trainee has told you that they would like to join your company. They have already demonstrated the skills and attitudes that you are looking for and you don't need to interview them.

**You offer them the job and they accept.**

Don't forget to formally tell the training provider – they will want to hear it from you as well as from the trainee.

There will still be final placement review paperwork to complete but the discussion won't be as detailed – the success will speak for itself.

In this case the final review meeting will be mostly a celebration and a 'thank you'.

If the job offer is an apprenticeship, it is also the opportunity for you to arrange a smooth transfer with your training provider.

Before we leave the subject of evaluation and moving on, the end of a placement is also your opportunity to reflect on your own experience of supporting a trainee in the workplace.

Think about what you did well, and whether there is anything you would do differently next time.

Is there any additional support or guidance that you would have found helpful?

What did you get from the experience?

What problems did you encounter and how did you solve them?

What have you learnt about your own skills as a coach and a mentor?

What advice would you give to someone else taking on a trainee?

Supporting a trainee in the workplace can be a hugely rewarding experience. Knowing that you have helped a young person take the first steps into a career is very satisfying and you will feel a great sense of pride when they succeed.

We wish you every success in your role.