Employee Coaching Session Form

Complete one form per coaching session. Fill in sections 1 to 3 before the conversation, sections 4 to 6 during it, and section 7 at the follow-up. Coaching is developmental and is not a disciplinary action. Give the employee a copy.

1. SESSION DETAILS

Employee name

Employee ID

Job title

Department / team

Coach (manager or team lead) name

Session date

Session number for this topic

☐ First session ☐ Second session ☐ Third session ☐ Fourth or later

Session type

☐ Skill development ☐ Performance gap ☐ Behavior or conduct ☐ Career growth
☐ Recognition and reinforcement ☐ Follow-up

2. COACHING FOCUS

The one skill, behavior or result this session is about

Expected standard (what good looks like, with the metric or policy if there is one)

Current level (with metric if measurable)

3. OBSERVATIONS

Specific examples with dates (what was seen or measured, not opinions)

What the employee is doing well that relates to this topic

4. EMPLOYEE'S PERSPECTIVE

Employee's view of the situation and any causes they identify

Obstacles raised (tools, training, workload, schedule, personal circumstances the employee chooses to share)

Any accommodation or leave question raised that needs to go to HR

☐ No ☐ Yes, referred to HR

5. AGREED ACTION PLAN

Action 1 (what the employee will do differently, by when)

Action 2

Action 3

How progress will be measured

Target to reach by follow-up

6. SUPPORT FROM THE MANAGER OR COMPANY

Support offered (training, shadowing, job aids, schedule change, extra check-ins)

Follow-up date

7. FOLLOW-UP REVIEW

Follow-up date held

Result at follow-up

- ☐ Standard met, coaching closed
- ☐ Improving, continue coaching
- ☐ No improvement, discuss next steps with HR

Notes and evidence

8. ACKNOWLEDGMENT

Employee comments (optional)

Employee signature (confirms the conversation took place, not agreement) Date

Coach signature Date

Date

COACHING LOG (ONE LINE PER SESSION)

Date | Topic | Key action agreed | Follow-up date | Outcome