



Coaching Continuous Improvement Process

Revised: 4-5-2021

Introduction

To achieve HeatSmart Alliance organizational goals, we need to scale up our coaching service with a growing cadre of volunteer coaches who provide a high-quality, consistent and professional service to clients. This document lays out a continuous improvement process with the following objectives:

- Bootstrap from our pioneering volunteers to a group of trained coaches following standardized practices
- Create a structured approach to onboarding new coaches
- Provide oversight and feedback that supports continuous improvement
- Measure coaching effectiveness, overall and of individual coaches.

The Continuous Improvement Process will be developed, maintained and overseen by the Coaching Working Group (the WG).

This document describes the components of the Continuous Improvement Process. Some components are required of all new coaches while others are optional or aspirational. A [Coach Review Panel](#) oversees the [Onboarding Process](#), which involves completing all required components of the process.

Continuous Improvement Components

The components of the Continuous Improvement Process are described in Table 1 below. The components required of all new coaches are listed in the order they should be completed.

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Table 1: Components of Continuous Improvement Process

Component	Description
Steps for becoming a Volunteer Coach REQUIRED	Aspiring coaches complete all steps listed in the Guide to Becoming a Volunteer Coach .
Introductory Training ASPIRATIONAL	The Alliance may offer introductory training classes or have access to training offered by outside parties (e.g. Abode Energy Management training for CMLP coaches)
Mentored Practical Experience REQUIRED	A new coach begins coaching with guidance from an assigned Mentor who reviews key communications with the client. Mentoring continues until the coach completes at least 3 engagements through step 5 (follow-up to initial meeting) of the Engagement Process .
Peer Review OPTIONAL	A coach can use informal discussions or a scheduled meeting to review one or more engagements. Reviews benefit both the presenting coach and the reviewers.
Assessment ASPIRATIONAL	In addition to the required Coaching Skills Self-Assessment, which should be periodically updated by all coaches, assessment may include <ul style="list-style-type: none"> • Internal reporting on engagements • Client satisfaction surveys
Advanced Training ASPIRATIONAL	This may include training materials and/or courses on modeling tools and specific technologies (e.g. GSHP, HPWH, etc.). Such training may be offered by the Alliance or other parties.

Coach Review Panel

The WG will designate an Review Panel that will administer the Onboarding Process described below. This panel will have at least three (3) members who have completed the Onboarding Process. Membership on the panel will be established by majority vote of the members in attendance at a WG meeting. The number of panel members may grow over time. Procedures for rotating membership of this panel may be established in the future. These responsibilities are assigned to a panel rather than the entire WG to enable faster scaling of the coaching service.

Initial Panel Members: We are starting with a handful of volunteers with varying amounts of knowledge and experience, and no established Onboarding Process. To bootstrap our Onboarding Process, the WG will appoint by vote at least three members of the panel.

Onboarding Process

This process is administered by the Review Panel. It provides a degree of assurance that a new coach has a basic understanding of the coaching model, heat pump technology, coaching collateral, and continuous improvement process.

The onboarding steps are:

1. The Applicant completes the Steps for Becoming a Volunteer Coach, including submission of a Coaching Application.
2. The WG lead distributes the documents to the Review Panel
3. The Review Panel reviews and approves the submitted documents (or requests revisions) and assigns a Mentor. The Mentor must be a member of the Panel or an Alliance member who has completed the Onboarding Process.
4. The new Coach begins their Mentored Practical Experience in which s/he completes at least three coaching engagements through step 5 of the [Engagement Process](#), keeping the mentor apprised of client communications in each engagement.
5. After completing the Mentored Practical Experience component, the Coach provides the Review Panel with artifacts related to the 3 substantive engagements. The minimum required artifacts are the homeowner questionnaire and the coach's written follow-up to the initial meeting.
6. The Coach Review Panel reviews the artifacts and approves the Coach to continue independently or recommends extending the Mentored Practical Experience.