How to Run a Coaches Clinic

AgileCrossing

Background

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I recently had the pleasure to facilitate my third Coaches Clinic at an Agile conference. The most recent one was the [Scrum Alliance Gathering 2013] in Las Vegas (SGLAS). Prior events were [Scrum Gathering Seattle in 2011] and [Agile 2012]. Several people have asked for tips on facilitating a clinic so I wrote this summary of the current process.

A Coaches Clinic is a service for conference attendees to get free help from experienced coaches. Volunteer coaches are recruited from the conference audience, a process is defined for attendees to sign up for short sessions with the coaches and a space is created for the coaching sessions. The service is then available for the duration of the conference, provided by matching coaches and attendees in the designated space. It is a great opportunity for people to meet and learn from each other, coaches as well as coaching clients.

This approach has evolved through experience, feedback from participants and input from others who have facilitated similar services at other events. This recipe is a starting point for your own clinic design.

Space

These are some ideal characteristics of the coaching space:

- Open and visible to conference attendees passing by
- Located in a separate, dedicated area adjacent to the main flow of attendees as the go about their other activities
- Tables and chairs for conversations of 2 – 5 people
- Sofas work well, too, but tables are more useful
- Quiet enough for conversations
- At Agile2012 we had 8 tables.

Materials

- Flip charts/easels and markers for the tables, minimally one per 2 tables
- Sticky notes, drawing paper, index cards, etc. for making notes during a coaching session
- Give-aways – ex. hats with the clinic sponsor logo
- Large white board for the sign-up chart
- Flip chart/easel for feedback

Marketing

- We do a little marketing prior to the event by describing the clinic on the conference program site and sending out some social media messages. The clinic is described in the printed event program, too.
- The clinic is described in a short presentation in the event opening speech.
- Signage is place near the clinic (a service banner and some signs with arrows).
- Coaches are given baseball caps to wear that advertise the clinic.
- Participants are given a hat (different color) when they visit the clinic, though we did not see these worn much at the last Scrum Gathering.

Coaches

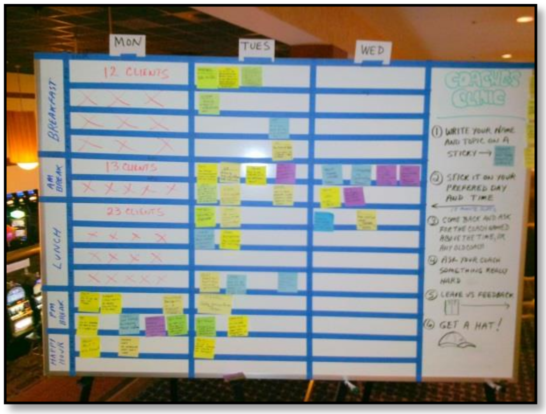
The Coaches Clinics we have presented are a service of the Scrum Alliance Certified Scrum Coaches Program.

Coaches are volunteers who are attending the event for other reasons. We vet the coaches beforehand by asking for volunteers from select populations of experienced coaches. Invariably we get walk-in volunteer coaches so we defined a set of criteria for the facilitator to apply when this happens. For example, our criteria for Agile 2012 were:

- Certified Scrum Coach
- Certified Scrum Trainer
- ICAgile Certified Coach
- International Coaching Federation Certified Coach working in the Agile community
- Agile 2010 - 2012 Presenter
- Working coach with a minimum of 3 years' experience who can be vouched for by someone meeting any of the above criteria

For Agile 2012, we created a website where volunteer coaches could sign up early and ask for specific coaching times. About half of our coaches came in that way; the other half joined during the conference.

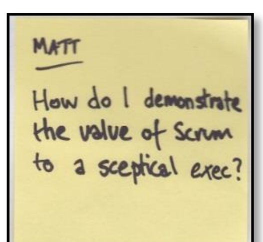
Appointments

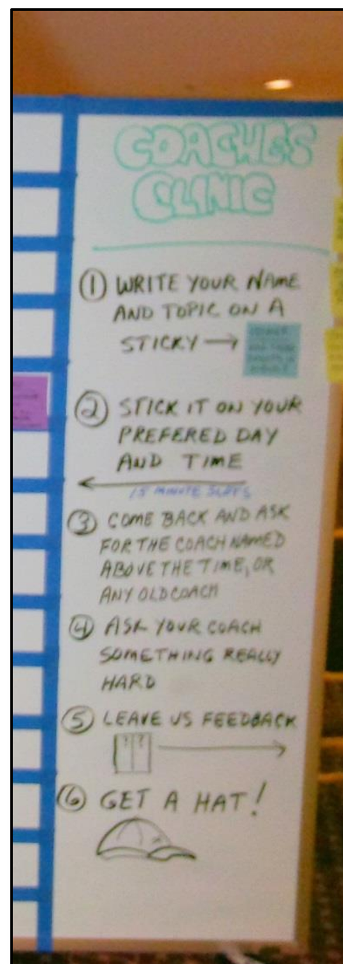


- Appointments are 15 minutes. Client can request two in a row or extend a session if no one was waiting.
- Regular clinic hours are conference breaks, an hour prior to the first session and an hour after the last session.
- People can sign up for multiple appointments.
- People can walk in and get immediate appointments if a coach is available.
- Coaches are free to remain in the space at other times and serve attendees who chose to skip conference sessions, but coverage is not guaranteed for those times.

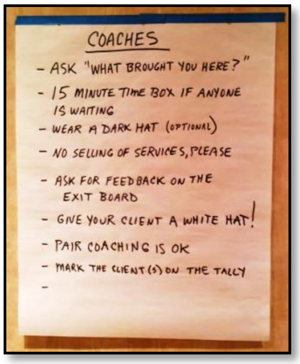
Process

- Attendees can request an appointment by filling out a sticky note and placing it on their desired time box on the sign-up board.
- The sticky note has the person's name (first is enough) and topic on it. The topic helps the facilitator and coaches match topics to coach expertise. This is rarely needed but often welcome.
- Attendees can ask for a specific coach on their appointment sticky but we do not guarantee that match-up when the time comes. It is up to the coaches to agree. In the past we have found such a guaranty to be difficult to enforce with volunteers who have competing priorities at the event.
- Clients are matched with their coach either by the facilitator or by any available coach. Conversations then take place at a table. Time-box enforcement is ad-hoc.
- Attendees are given a hat (or other thank-you gift) and asked to leave feedback before exiting.





Tools



- The sign-in board is the most extensive tool. Its purpose is to provide a place for client sign-ups. We have tried various designs for this board. The latest simply provides space for up to 5 sticky notes for each quarter-hour time slot on each day of the event.
- In the past we have attempted to have a parallel or integrated sign-up for coaches to claim their preferred time slots. In the last event (SGLAS) we abandoned this practice for simplicity and it seems to work fine.
- A feedback board is fun and useful. We have experimented with several designs. At SGLAS we keep it to a simple two columns: “What did you like?” And “What would make it perfect?”
- Daily feedback is transferred to a separate location to make room for the current day’s feedback. The past feedback is positioned nearby as additional marketing collateral for passers-by. We have put it on a separate board or on the sign-up board for days past.
- Similarly the day’s client topics are moved to a summary sheet for marketing purposes.
- Client visits are tallied on a wall chart and summarized on the sign-in chart for past days.

Coaching

- A kick-off meeting is held the evening before with whichever coaches are present. This is the time to decide on working agreements and set up the space.
- We ask that coaches honor the community service aspect of the event and not sell their services during the appointment. Trading business cards for future contact is ok.
- Pair coaching is allowed and encouraged when coach supply exceeds demand. It is a great opportunity for coaches to learn from each other.
- Coach shadowing is encouraged for people who are interested in growing their coaching skills. We suggest that the primary coach ask the client permission to have a shadow.
- The clinic is an opportunity for rapidly applying coaching skills. You have a short time to determine the kind of assistance you may provide. Start by asking the client how you can be of help. Ask enough questions to determine if the client has access to their own answer to the topic of interest. If you think they do then use your coaching skills to help them find the answer. If they are just looking for information, share your expertise on the subject.
- End-of-day retrospectives are great but impractical given competing activities. An alternative is to keep a running retrospective board just for coaches.

Facilitation

The clinic will not run itself. We have found that having a facilitator is important.

Facilitator duties include:

- Recruiting and vetting coaches
- Marketing the service
- Setting up the space
- Gathering coaches to make initial agreements and conduct daily retrospectives. Note that the coaching team is a herd of cats, never the same cats available from day to day.
- Designing the sign-in board and other artifacts
- Keeping the client flow going smoothly
- Keeping the space reserved for coaching
- Matching coaches to clients either by simple availability or by expertise
- Keeping the coaching materials fresh
- Managing the process – client counts, feedback reminders, moving daily artifacts to a summary space to make room for a new day of artifacts
- Loosely enforce the 15-minute coaching session time-box when clients are waiting
- Delegating these duties when the primary facilitator is not available

FlowMaster

- We have found it to be very useful to have a clinic "greeter" at the sign-up board to help answer questions, encourage prospective clients and match clients with available coaches. In our experience, this is usually the clinic facilitator but can be any coach. The term we used at SGLAS was "FlowMaster", a brand name associated with plumbing and exhaust systems in the US.

- A secondary job of the greeter is to pull coaches in from the surrounding space when demand exceeds supply. Coaches tend to congregate in small discussion clumps nearby, an additional value for participating coaches.

Alternate Format

At the Scrum Gathering in Amsterdam in 2010, a Group of Certified Scrum Coaches used a different format. The main difference is that the coaching sessions were held for groups of people interested in particular topics, a little more like a coaching-specific open space. You can find a description here: http://www.slideshare.net/kalteneckerSigi/scrum-clinic-amsterdam-2010.

Summary

The Coaches Clinic has become an integral part of the Scrum Alliance Gatherings and the Agile Alliance Conferences. We have tried several variations with more and less formality. This recipe worked well at SGLAS where we had 150 clinic visits from a total conference attendance of 500 people. We handled about the same volume at Agile 2012 with a slightly more formal process.

The recipe described here is domain-independent so it could work well for a similar clinic at any kind of conference where there are curious participants and experienced coaches.

Acknowledgements

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Some images courtesy of Scrum Alliance, Inc.

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