

Coaching Observation Sheet

Choose coaching support based on observed behavior rather than a quick assumption about the person.

When to use it

Use in a development conversation when a capable colleague is struggling with a particular behavior or task.

Work the questions in order

1. Describe the behavior neutrally and ask for the colleague's view.
2. Explore capability, confidence, clarity, and constraints before deciding on support.
3. Agree on a small practice opportunity, useful feedback, and a review point.

Fictional worked example

A colleague hesitates to send proactive customer updates. After discussing the concern, the manager agrees to review an initial draft and give specific feedback, then revisit whether that support is still needed.

A note on judgment

This is a development aid, not an employee-rating system or a substitute for your organization's HR process. Keep notes private and use respectful, behavior-based language.

Open the related case

[Confidence, Not Capability](#)

Newly created educational template, not a former-employer document or a validated scoring model. Adapt it to your context. Keep confidential information out of shared copies.

Your working notes

Coaching Observation Sheet / Part 1 of 2

Context or anonymized account: _____

Date: _____ Review date: _____

01 Observed behavior

What happened in a specific situation? Avoid personality labels.

02 Colleague's perspective

How do they describe the difficulty and the support they need?

03 Working hypothesis

Is this about skill, confidence, unclear expectations, workload, or another constraint?

04 Evidence and alternatives

What supports the hypothesis? What else could explain the behavior?

From clues to action

Coaching Observation Sheet / Part 2 of 2

05 Support to try

Would demonstration, practice, clearer expectations, peer observation, or removing a blocker help?

06 Agreed practice

What will they try, and what will the manager do to support them?

07 Progress and review

What observable behavior will you discuss at the next check-in?

Before you close the file

Check what is known, what is assumed, and what still needs confirmation. Agree on the next action and the review point. A completed worksheet is not a solved case.