



Performance Management: To Coach or Supervise?

26th November 2022



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I am

- Founder and CEO of OulbyZ
- Partner, Global Performance Solutions Group



My background

- 25 years as a corporate executive in the Life Insurance industry including 15 years as a senior leader, CXO and CEO
- Roles across Compliance, Customer, Distribution, Marketing, M&A, Product, Strategy, Training
- Market experience across 8 countries in Asia and Middle East

I reinvented myself

- Followed my calling of helping the next generation to find their Ikigai
- One the 50 Certified Ikigai Tribe Coaches globally



Centering Exercise

Let's start with some scenarios of performance management. Let's identify the activity: **supervision** or **coaching** or **a combination** of these two conversations

1. You are having your daily check-in to evaluate your agent's sales activities.

Supervision

2. During this meeting you find that your agent has difficulty in handling objections.

Supervision to Coaching

3. The agent has a personal goal of becoming an Agency Leader.

Coaching

Understand the **Distinction** between **Supervision** and **Coaching**



Supervision

1. Task oriented, **directive**
2. Setting of **performance expectations**
3. Focused on **meeting the standards and execution**
4. Focused on **providing training**

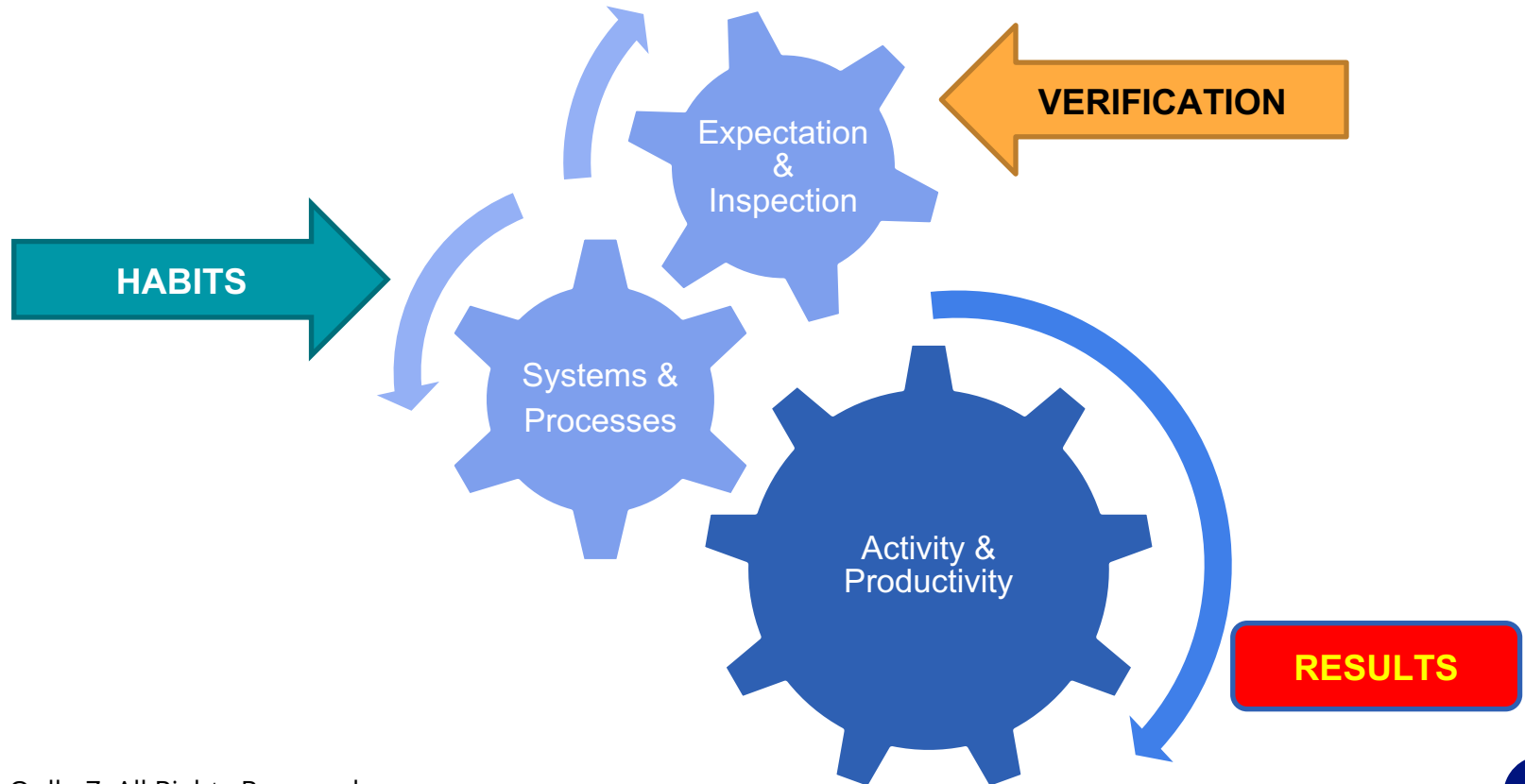
Coaching

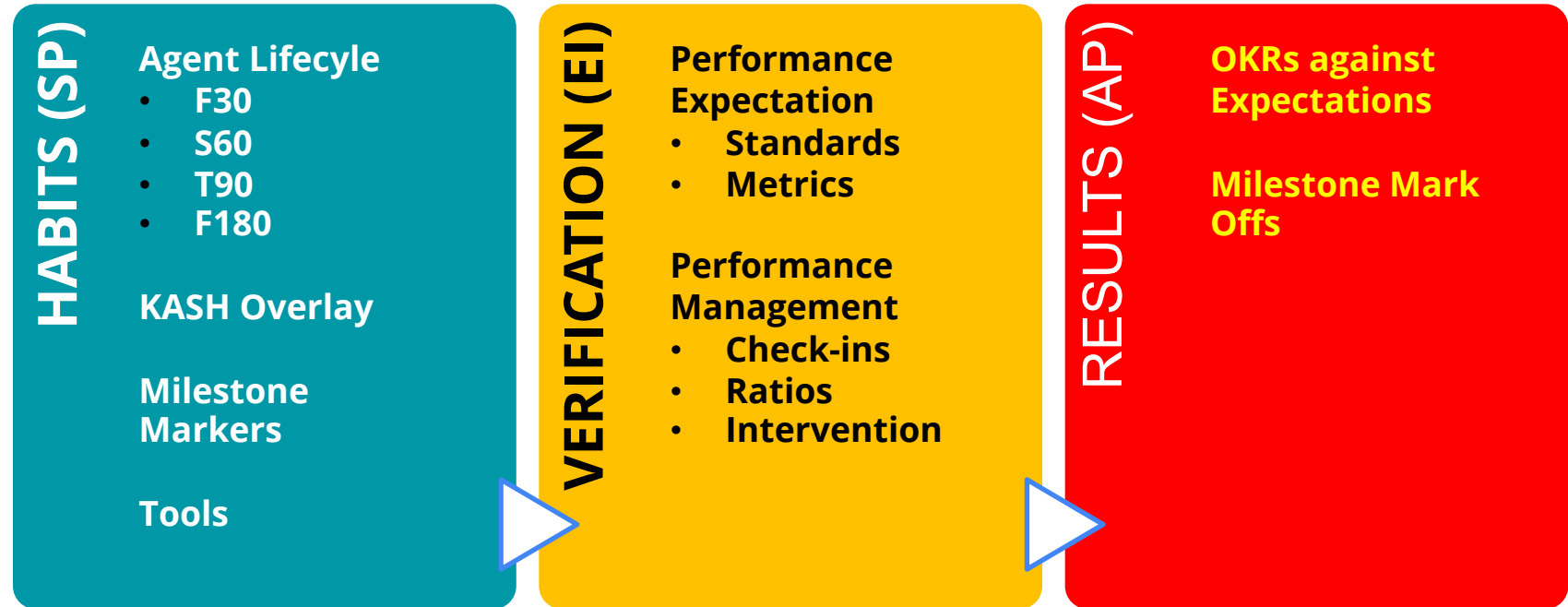
1. Focused on the **individual**
2. Focused on **developing** new habits or **changing** old **habits**
3. Being a **sounding board** to the individual
4. Being a **source of confidentiality** and **non-bias**



**Hence, Coaching is
NOT
Supervision.
Both are unique activities**


$$SP \times EI = AP$$





The Coaching Ladder

Change is realized as change is now a habit

Review and calibrate to embed change

Commitment and promises in action for change

**Ready for commitment for change?
What are the promises?**

**Why does this need to change?
Why is it important?**

What is the subject that requires change?

**Double Loop
through
Ontology:
OAR and BEL
models**

**Coach/Coachee can end
coaching relationship if
there is a breach of
agreement**

Agreement to Coach

Supervision is task oriented whilst Coaching is person focused

Everyone can be Supervised but not everyone can be Coached

A Leader emotionally connected with the success of Supervision but not emotionally connected with the success from Coaching

T in Cs

- **Sincerity**
- **Competence**
- **Reliability**
- **Care**



Thank You

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