150 Tools for Action Learning and Group Coaching

The following tools are shared with students in various Action Learning Source workshops about peer learning, for example, in group coaching and Action Learning workshops. Tools include guidelines, templates, checklists and forms. We have written or modified the vast majority of the tools. We strive to credit authorship in each tool, where possible. Tools are organized into the following categories. (For information about workshops, see ActionLearningSource.com)

Categories of Tools

Tools for General Facilitation in Action Learning and Group Coaching

Understanding Yourself as Facilitator
- Understand Your Biases (CM)
- Talk About "Problems" or "Opportunities"? (CM)
- Your Preferred Consulting Style? (CM)
- Your Responses to Feedback and Conflict? (CM)
- Your Approaches to Problem-Solving and Decision-Making? (CM)
- Your Preferred "Lens" to View Organizations? (CM)

Building Trust With Others
- How to Work in Multicultural Environments (CM)
- How to Remain Authentic (CM)
- How to Really Listen (CM)
- How to Understand Body Language (CM)
- How to Make Sure Others Hear You (CM)
- How to Share Useful - and Respectful – Feedback (CM)
- How to See Others Points of View (CM)
- How to Manage for Realistic Expectations (CM)
- How to Help Others to Appreciate (CM)

Getting Started
- Checklist for Validating Facilities (CA)
- Checklist for Centeredness

General Facilitation and Meeting Management
- Checklist for Good Meeting Management (CM)
- Checklist for Successful Facilitation (CM)
- How to Enhance Group Participation (CM)
- How to Design Groups for Successful Facilitation (CM)
- How to Know What Role to Play - Facilitate, Coach, Direct or Train? (CM)
- Facilitating in Highly Diverse Environments (CM)

Generating Group Ideas
- Brainstorming Procedure (CM)
- Stories (to Convey Positive, Individualized Learning) (CM)
- Discussion Guidelines (CM)
- Round-Robin Procedure (CM)
- Nominal Group Technique (CM)

Making Group Decisions
- Voting (CM)
- Consensus Process (CM)
- Reference-to-Authority (CM)

Staying Grounded and Centered During Facilitation
- How to Motivate Yourself (CM)
- How to Manage Your Time and Stress (CM)
- Checklist for Centeredness (CA)
- How to Know When to Ask for Help (CM)
- How to Know When to Leave a Facilitation Project (CM)

Maintaining Professionalism for Consultants and Facilitators
- Principles for Effective Consulting and Facilitating
- Principles for Ethical Consulting and Facilitating
- How to Maintain Proper Boundaries
- How to Minimize Legal Liabilities and Risks

Tools for Peer Learning Programs (Action Learning and Group Coaching)

Designing Group Coaching and Action Learning Programs
- Peer Learning Design Team Job Description (CM)
- Checklist of Outcomes from Group Coaching and Action Learning (CM)
- Peer Learning Models (CM)
- Checklist to Design Group Coaching and Action Learning Programs (CM)
- Checklist to Acculturate Group Coaching and Action Learning Programs (CM)
- Guidelines to Integrate Group Coaching and Action Learning with Other Methods (CM)
- Guidelines to Integrate One-On-One Coaching With Group Coaching (CM)
- Clearness Committees Compared to Action Learning (CM)

Program Sponsor and Facilitators
- Job Description of Peer Learning Program Sponsor (CM)
- Job Description of Group Coaching and Action Learning Facilitator (CM)
- Coordination Between Program Developer and Facilitator (CM)
- Facilitator Assessment Questionnaire (CM)

Marketing Peer Learning Programs
- Checklist to Roll Out Peer Learning Program (CM)
- Guidelines to Market Peer Learning Programs (CM)
- Checklist to Orient Stakeholders to Group Coaching and Action Learning (CM)
- Checklist to Orient Upper Management About Peer Learning (CM)
- Orienting Traditional Instructors About Peer Learning (CM)

Selecting Group Members
- Guidelines to Select Group Members (CM)
- Group Member Application Form (CM)
- Group Member Assessment Questionnaire (CM)
- Coaching Contract Between Members and Facilitator (CM)
- Enrolling Group Members (CM)

Forming Peer Learning Groups
- Checklist to Form Peer Learning Groups (CM)
- Guidelines to Form Intact-Team Peer Learning Groups (CM)
- How to Enrich Peer Learning Groups (CM)
- Typical Life Cycle of Group Coaching and Action Learning Groups (CM)
- Checklist to Cultivate Self-Facilitating Peer Learning Groups (CM)

Training Group Members on Group Coaching and Action Learning
(Also see the next section, "Facilitating Peer Learning Meetings," for numerous tools on coaching.)
- Checklist to Train Members (CM)
- Checklist to Facilitate Triads (CM)
- Procedure to Facilitate Couplets (CM)
- Procedure to Facilitate Fishbowls (CM)

Training Group Members on Coaching
(Also see the previous section, "Training Group Members" for more guidelines to train on coaching.)
- Understanding GROW Coaching Model (CM)
- Coaching Versus Chatting (CM)
- Coaching Versus Feedback (CM)
- How to Question Others
- How to Really Listen
- How to Paraphrase and Summarize
- How to Reframe for Meaning
- How to Identify Relevant and Realistic Action Plans
- Coaching Tips to Send Between Meetings (CM)

- Types of Useful Questions to Ask (CM)

Virtual Facilitation of Peer Learning Groups
- Tips for Virtual Facilitation (CM)
- Suggested Contents for Virtual Peer Learning Website (CM)
- MeetingSphere Templates (CA)

Collecting and Dispersing Learning from Groups
- Template to Collect Group Learnings (CM)
- Guidelines to Disperse Learnings Throughout Organization (CM)
- Integrating Learning Into Project (CM)

Ending Groups / Programs
- Guidelines for Closing Groups / Programs (CM)

Evaluating and Troubleshooting Programs
- Checklist to Design Evaluation Plans (CM)
- Sample Comprehensive Peer Learning Evaluation Plan (CM)
- Sample Questionnaire to Evaluate Programs, Meetings, Facilitation and Members' Outcomes (CM)
- Peer Learning Meeting Report
- Troubleshooting Group Coaching and Action Learning Programs (CM)
- Evaluating Group Coaching and Action Learning Training (CM)

Facilitating Peer Learning Meetings

Coaching Sessions – Selecting the Priority
- Some Types of Individual Outcomes to Address in Group Coaching and Action Learning (CM)
- Individual Assessment Tools (CA)
- Some Types of Organizational Priorities to Address to Group Coaching and Action Learning (CM)
- Organizational Assessment Tools (CM)
- How to Select the Best Organizational Assessment (CM)

Coaching Sessions – Framing the Priority
- Convergent and Divergent thinking (CA)
- How to Paraphrase and Summarize (CM)
- Framing model (problem, goal, strategy) (CA)
- Framing Tools (CA)
- Visualization Techniques (CA)
- Reframing Problems (CM)
- How to Find Real Causes of Problems, Not Just Symptoms (CM)

Coaching Sessions – Researching the Priority
- Planning Your Business Research (CM)
- Overview of Methods to Collect Information (CM)
- Ethics: Information Release from Research Participants (CM)
- Guidelines to Conducting Observations (CM)
- Guidelines to Writing Questionnaires (CM)
- Guidelines to Conducting Interviews (CM)
- Guidelines to Conducting Focus Groups (CM)
- Guidelines to Completing Case Studies (CM)
- Guidelines to Conducting Pilot Research (CM)
- Convenient Methods to Collect Information (CM)
- Major Sources of Market Research Information (CM)
- Analyzing and Interpreting Research Data (CM)

Coaching Sessions – Analyzing the System
- Context Map (to Depict Systems) (CA)
- Stakeholder Map (to Depict Systems) (CA)

- System Map (to Depict Systems) (CA)
- Logic Model (to Depict Systems) (CM)
- Chaining Logic Models (for Integrating Systems) (CM)
- How to Analyze How People Think (CM)
- Left-Hand Column (Examines "Hidden" Communications) (CM)
- Ladder of Inference (Analyzes Conclusions and Actions) (CM)

Coaching Sessions – Strategizing Solutions
(Also see "Generating Group Ideas" in the previous section, "Tools for General Facilitation".)
- SWOT Analysis (CM)
- Polarity Management (CM)
- Force-Field Analysis (CM)
- Rational Problem Solving Procedure (CM)
- Organic Problem Solving Procedure
- Checklist to Analyze Barriers to Change (CM)
- Checklist to Prepare for Contingencies (CM)
- Guidelines for Mission, Vision and Values Statements (CM)

Coaching Sessions – Committing to Actions
(Also see "Making Group Decisions" in the previous section, "Tools for General Facilitation".)
- Challenge Action (CA)
- Personal Development Action (CA)
- "Sanity Solution" (CM)
- "Upside / Downside" (for Analysis of a Potential Decision) (CM)
- "DECIDE" (to Ensure Comprehensive Decision Making) (CM)
- Checklist to Integrate Actions Plans (CM)
- How to Develop Relevant and Realistic Action Plans (CM)
- Example of Useful Action Plans (CM)
- Goals and Actions Register (CM)
- Finalizing Action Plans – Integration and Reality Check (CM)
- "Monkey Trap" (when all else fails) (CM)

Coaching Sessions – Reflecting on Learning
- Types of Learning (Kolb) (CA)
- Levels of Learning (Argyris) (CA)
- Creating Learning Environment (CA)
- Learning Journal (CM)
- Developing a Learning Plan to Capture Learning (CM)

Coaching Sessions – Reporting Results to Management
- Generating Relevant and Realistic Recommendations (CM)
- Reporting Research Findings and Conclusions (CM)

Complete Framework for a Marketing Plan (CA)
- Identifying Target Markets, Their Features and Benefits They Perceive
- Clarifying Your Unique Value Proposition Description
- Naming Your Program
- Determining Your Pricing
- Analyzing Your Competitors
- Identifying Your Collaborators
- What Laws and Regulations Affect Your Services?
- Describing Your Services
- Establishing Your Marketing Goals