



Mentor Coach Observation Guide

Holistic Observation
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Mentor Coach Holistic Observation Tool

Coach Observed: _____ Mentor Coach: _____

Date: _____ Length of Observation: _____

Rating Scale

Rating	Description
1	Strongly Ineffective Practice (Far Left or Far Ride Side of Continuum)
2	Some Emerging Skills but Often Leans to Ineffective Practice on Left Side
3	Some Emerging Skills but Often Leans to Ineffective Practice on Right Side
4	Effective Practice, Leans Mostly to the Sweet Spot
5	Strong Effective Practice, Consistently Balanced ("Sweet Spot")

Mentor Coach Holistic Observation Rubric

1 – 2 – 3 – 4 – 5 – 4 – 3 – 2 – 1					
Coaching Domain	Ineffective (Left Side) 1-2-3-4	Effective ("Sweet Spot") 5	Ineffective (Right Side) 4-3-2-1	Observed Evidence	Rating (1-5)
Elicitive	Primarily gives advice, answers, and solutions.	Uses questions to help the coachee think through challenges while selectively offering suggestions or expertise when helpful.	Only asks questions and avoids providing guidance when it would be useful.	<i>Questions asked, examples of advice given, moments where ownership remained with coachee, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Directive	Coach determines agenda and focus without collaboration.	Collaborates with coachee to identify priorities and remains flexible as needs emerge.	Provides little structure and simply follows whatever arises.	<i>How agenda was established, shifts in focus, evidence of collaboration, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

1 - 2 - 3 - 4 - 5 - 4 - 3 - 2 - 1

Coaching Domain	Ineffective (Left Side) 1-2-3-4	Effective ("Sweet Spot") 5	Ineffective (Right Side) 4-3-2-1	Observed Evidence	Rating (1-5)
Transparency	Frequently leads with opinions, judgments, and interpretations.	Shares observations and assessments while inviting reflection and dialogue.	Avoids offering observations or perspectives.	<i>Specific observations shared, how assumptions were tested, coachee responses, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Experience	Operates from an "expert" stance and frequently centers own experience.	Uses personal experience strategically to support learning and insight.	Rarely contributes useful experience or examples.	<i>Stories shared, lessons offered, how focus returned to coachee, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Vulnerability / Depth	Remains at surface-level problem solving.	Balances practical challenges with curiosity about deeper patterns, beliefs, and assumptions.	Consistently pushes for deeper exploration regardless of readiness or need.	<i>Examples of reflective questions, pattern spotting, exploration of underlying issues, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Taskiness	Focuses almost entirely on business, plans, and tasks.	Balances authentic relationship building with accomplishing meaningful work.	Focuses primarily on connection and conversation without moving work forward.	<i>Rapport-building moments, accountability conversations, movement toward goals, etc.</i>	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Effective Coaching Practices Observation Table

Coaching Practice	Observed Evidence	Rating
Demonstrates presence and attentiveness to the coachee's experience		N / D / C
Listens with both empathy and analysis		N / D / C
Helps coachee make meaning from successes and challenges		N / D / C
Centers coachee agency and ownership		N / D / C
Helps coachee identify their own solutions		N / D / C
Uses questions that support and challenge thinking		N / D / C
Balances support and accountability		N / D / C
Demonstrates curiosity rather than judgment		N / D / C
Creates psychological safety		N / D / C
Encourages reflection and learning		N / D / C

N = Not Yet Demonstrated | D = Developing | C = Consistently Demonstrated

Common Coaching Traps

Observe whether the coach avoids these ineffective practices.

Potential Trap	Observed?
Providing answers before fully understanding the challenge	☐ Yes ☐ No
Over-preparing solutions	☐ Yes ☐ No
False praise	☐ Yes ☐ No
Only focusing on strengths	☐ Yes ☐ No
Only focusing on weaknesses	☐ Yes ☐ No
Telling people what to do	☐ Yes ☐ No
Excessive criticism	☐ Yes ☐ No

Evidence Capture Section

This section helps mentor coaches gather specific examples that can be used in feedback conversations.

Coaching Move Observed	Direct Quote or Evidence	Impact on Coachee
Powerful Question		
Observation Shared		
Challenge Offered		
Support Provided		
Reflection Prompt		
Coaching Opportunity Missed		

Effective Campaign Coaching Behaviors

Observe whether the coach demonstrates the following throughout the session.

Behavior	Not Yet	Developing	Consistent
Fully present and attentive to another person's experience	☐	☐	☐
Listens with both empathy and analytical thinking	☐	☐	☐
Helps coachee make meaning from successes and challenges	☐	☐	☐
Centers coachee agency and ownership	☐	☐	☐
Supports problem-solving rather than solving problems for others	☐	☐	☐
Asks questions that both support and challenge	☐	☐	☐
Encourages reflection and learning	☐	☐	☐

Reflective Debrief Questions for Mentor Coaches

Strengths

1. Where did the coach operate most effectively in the coaching "sweet spot"?
2. What behaviors created the most learning, reflection, or ownership?
3. What coaching strengths should be continued and strengthened?

Growth Areas

1. Which continuum does the coach tend to lean toward?
2. When did the coach become overly directive or insufficiently directive?
3. What opportunities existed to deepen reflection or increase coachee ownership?
4. What coaching moves might improve balance?

Next-Step Commitments

1. One coaching practice to continue:
2. One coaching practice to strengthen:
3. One coaching experiment before the next observation:

Observation Summary

Coach's Strengths (with Evidence)

Strengths	Evidence

Growth Opportunities (with Evidence)

Growth Opportunities	Evidence

Recommended Next Coaching Experiment

Practice to Grow	Specific Experiment	Success Indicators

Domains of Coaching, Evidence to Look For, and Indicators

Domain 1: Elicitive Coaching

Effective Practice

The coach primarily helps coachees think through challenges themselves by asking questions, while strategically offering suggestions or perspectives when useful.

Evidence to Look For

- Uses open-ended questions
- Explores thinking before providing answers
- Invites reflection on successes and challenges
- Offers suggestions sparingly and strategically
- Encourages coachee agency

Indicators

Rating	Evidence
1	Primarily gives advice and solutions
2	Often instructs rather than explores
3	Strong balance of questions and selective guidance
4	Skillfully helps coachees discover solutions while appropriately contributing expertise
5	Questions only; avoids providing useful guidance even when needed

Domain 2: Direction and Structure

Effective Practice

The coach provides enough structure to create focus while collaborating with the coachee on priorities and remaining flexible throughout the conversation.

Evidence to Look For

- Establishes purpose
- Co-creates agenda
- Checks priorities during conversation
- Adapts to emerging needs

- Maintains productive focus

Indicators

Rating	Evidence
1	Coach controls agenda entirely
2	Limited collaboration on priorities
3	Shared ownership of goals and agenda
4	Strong structure with flexibility and responsiveness
5	No structure or intentional focus

Domain 3: Transparency

Effective Practice

The coach openly shares observations and assessments while ensuring the coachee remains the primary meaning-maker.

Evidence to Look For

- Shares observations clearly
- Explains reasoning and patterns noticed
- Tests assumptions
- Invites reaction and disagreement
- Balances advocacy and inquiry

Indicators

Rating	Evidence
1	Dominates with opinions and interpretations
2	Frequently tells rather than explores
3	Shares observations while maintaining dialogue
4	Uses transparency to deepen reflection
5	Avoids sharing observations or assessments

Domain 4: Use of Experience

Effective Practice

The coach appropriately shares personal experiences, lessons learned, examples, and stories in service of the coachee's development rather than to demonstrate expertise.

Evidence to Look For

- Shares experiences selectively
- Connects stories to coachee needs
- Uses examples to illuminate options
- Avoids positioning self as expert
- Returns focus to coachee

Rating	Evidence
1	Frequently positions self as expert
2	Stories dominate learning process
3	Appropriate use of relevant experience
4	Experience deepens learning and reflection
5	Refuses to contribute experience or insight

Domain 5: Depth and Vulnerability

Effective Practice

The coach helps the coachee address immediate challenges while remaining curious about deeper patterns, assumptions, and leadership habits.

Evidence to Look For

- Explores underlying causes
- Notices recurring patterns
- Invites reflection
- Connects actions to values
- Balances depth with readiness

Rating	Evidence
1	Stays only at the surface level
2	Occasional reflection but largely task-focused
3	Appropriate balance of practical and reflective coaching
4	Helps reveal meaningful patterns and growth opportunities
5	Pushes for deeper reflection regardless of readiness

Domain 6: Connection and Task Focus

Effective Practice

The coach creates authentic human connection while maintaining accountability and accomplishing meaningful work.

Evidence to Look For

- Builds trust and rapport
- Demonstrates genuine interest
- Manages time effectively
- Maintains momentum
- Advances coaching goals

Indicators

Rating	Evidence
1	Entirely task-focused with little relationship building
2	Minimal personal connection
3	Healthy balance of relationship and results
4	Strong trust-building while maintaining accountability
5	Conversation becomes mostly social and loses focus