



Attendees of the Project Athena briefing held Feb. 17, 2022, learned about its goal to make stronger leaders and teams. The initiative will make users more self-aware of their strengths and weaknesses and provide developmental resources. (Photo by Alexandra Shea, Fort Jackson Public Affairs Office)

Project Athena in Action

Coaching and the IDP (Part 1)

By Sgt. Maj. Craig A. Collins

NCO Leadership Center of Excellence

Coaching enables individuals to understand their current level of performance and guides their performance to the next level. Become a Leader who excels at coaching subordinates.
(Department of the Army, 2017, p. 5-3)

The challenges facing today's Soldiers are vastly different than those faced by past generations. Enemies lurk in all operational domains, including cyberspace, and Soldiers must be vigilant. They also face the increasingly difficult challenges of maintaining their personal lives as they navigate the complexities of modern society. The professional and personal demands placed upon Soldiers require balance, and Project Athena and its focus on personal development can help provide that balance.

Project Athena is a confidential, progressive, and sequential battery of assessments administered at all levels of noncommissioned officer professional military education (NCOPME) to help Soldiers develop

self-awareness. This is done through detailed feedback reports generated by the assessments, performance coaching from instructors, and by developing Common Individual Development Plans (IDP) that help Soldiers accomplish professional and personal goals and objectives. While the *NCO Journal* previously published two articles on the overview and use of Project Athena, this article series specifically focuses on coaching and how to use it to positively develop Soldiers.

Coaching

Coaching from a Project Athena perspective focuses on creating an IDP that helps Soldiers accomplish short- and long-term goals. These goals can be personal, professional,

or both. There are multiple ways to coach an individual but the Center for the Army Profession and Leadership (CAPL) produced an excellent “cheat” sheet or checklist outlining each step in the process (the checklist can be found on page 22 of the [Personal Assessment Coaching Guide](#)).

Rule 1 – Active Listening, defined as being “fully engaged in what the Leader is saying” (“Personal Assessment Coaching Guide,” 2020, p. 27). In other words, listen for key words or phrases that give an idea of what the Soldier (leader) wants to accomplish. For example, if a Soldier says he or she is ready for a position of greater responsibility then the coach might guide the discussion towards current and future duty positions and the requirements associated with such a position, i.e., team leader to squad leader.

Rule 2 – Effective Questioning – defined as “asking the right question at the right time” (The ABCs of Facilitation, n.d., p. 1-1). A guided conversation can stimulate a Soldier’s thought processes and help them see multiple perspectives to solve a problem or ways to accomplish a goal. Effective questioning develops critical thinking skills and empowers Soldiers to take ownership of their development.

The Process



The coaching process is simple, it’s all about what the Soldier wants to accomplish from both personal and professional perspectives. The coaching resource card lists all the steps in order to conduct an initial coaching session in any setting. It can be used with or without the feedback from Project Athena with equal effectiveness, although it might take a little bit longer without the feedback. The steps to conduct an initial coaching session are (See *Figure 1*):

1. **Introductions**
2. **Discuss confidentiality**
3. **Discuss the rules of the coaching session**
4. **Initial questions**
5. **Assist Leader in understanding the feedback**
6. **Assist Leader in creating an IDP**
7. **Coaching session closure**

Introductions are vital for coaches to establish credibility, they should talk a little about themselves (experience, education, etc.) and ask Soldiers about themselves to create context and shared understanding for the session.

Next coaches should discuss **confidentiality**, informing them that if they elect to share the feedback results from the Project Athena assessments they will not be used for promotions, schools, positions, etc. They will only be used to guide the IDP.

Next, coaches will establish the **rules** for the coaching session. This will encourage Soldiers to be honest and open and requires coaches to set an atmosphere in which

 <div style="text-align: center;"> <small>For institutional use</small> COACHING RESOURCE CARD </div> <div style="text-align: right;">  </div>		
<small>Coaching is a structured one-on-one relationship focused on facilitating learning and improving performance to achieve goals and create desired results. As a coach, you will—</small>		
<ul style="list-style-type: none"> • Partner with the leader—you both contribute to the process, but the leader owns it. • Focus on the leader's thinking process—focus on the leader's needs and interests, but prepare to direct attention to potential blind spots or strengths to leverage or build upon. • Demonstrate curiosity and genuine interest—interest in what is possible for the leader's development. 		
STANDARDIZED COACHING SEQUENCE		
Section	Topics Covered or Questions Asked	Suggested Duration
1. Introductions	<ul style="list-style-type: none"> • Coach introduces himself or herself and asks the leader to share their Army background. • Coach shares their background with the leader. This should be brief and focused on experiences that relate to the leader's situation. • Keep introductions very brief if you and the leader are already familiar with one another. 	5 minutes
2. Discuss Confidentiality	<ul style="list-style-type: none"> • “This information is not used for official or unofficial evaluations.” • “Interpretation of these data and any outcomes are not tied to scores, ratings, or evaluations for this course.” • “No information will be given to your chain of command or anyone else.” • “You can discuss anything in this session and it will be kept confidential.” 	2 minutes
3. Discuss the Rules of the Coaching Session	<ul style="list-style-type: none"> • “Be honest and open with yourself and me.” • “We will look at your strengths, but more importantly, we will look at your developmental needs. Be willing to accept criticism and remain open and positive.” • “I will assist you in identifying and creating a plan to address your areas of developmental need. We will discuss reasons why there may be certain feedback or why certain perceptions may exist.” • “I will assist you in creating your individual Development Plan (IDP) as a part of this coaching session.” 	2 minutes
4. Initial Questions	<ul style="list-style-type: none"> • “What do you expect to get out of this coaching session?” • “Can I suggest a way ahead for how we use our time during this session?” 	1 minute
5. Assist Leader in Understanding Feedback	<ul style="list-style-type: none"> • Review assessment purpose and how it fits with the leader's goals or current position. • Interpret and reflect on results. Explore how they aligned with the leader's understanding of their capabilities. • Interpret high and low results at the detailed behavior or attribute level (for example, five highest and five lowest). 	20-25 minutes
6. Assist Leader in Creating an Individual Development Plan (IDP)	<ul style="list-style-type: none"> • Define the desired focus and outcome[s]. • Identify planned developmental activities linked to focus areas and objectives. • Specify progress indicators. • Document the timeframe or status for achieving the objective[s]. 	10-15 minutes
7. Coaching Session Closure	<ul style="list-style-type: none"> • Review and reinforce identified strengths. • Review developmental needs the leader selected to focus on. • Ask the leader if they are committed to improving and using the IDP. • Thank the leader for their time and provide final words of encouragement and motivation. 	5 minutes

See the Personal Assessment Coaching Guide for detailed instructions and prompts to use as a coach. FM 6-22 and the Leader Development Improvement Guide provide resources for developmental activities.

Figure 1: Coaching Resource Card

Soldiers feel comfortable discussing their goals. This is a key area in which coaching differs from counseling, counseling can be one-sided and carry a negative connotation. In contrast, the goal of this coaching step is to create a team bond where the coach and Soldier work together to establish the Soldier’s development goals.

After these first three administrative steps are completed, the ‘meat and potatoes’ of the coaching session begins. The **initial questions**, arguably the most important part of the session in establishing what the Soldier wants to accomplish (Tip – write down what the Soldier says and revisit it during the session closing, if you have not accomplished what the Soldier wants in this stage, then more time may be required or a follow-on session should be scheduled). In this step a Soldier may say “I want to get promoted,” or “I want to buy a house,” etc. This step requires active listening, and if the expectation is specific, then a short-term or long-term goal can be captured and applied to the IDP. If the expectation is not specific, then coaches should be prepared to ask guided questions to narrow the coaching session’s focus.

Once initial expectations are established, and Soldiers elect to share the feedback from the Project Athena assessments, coaches can **review their feedback** and help them **understand** what it means and how it can be acted on. Feedback from the assessments can create Soldier self-awareness while establishing



Sgt. Maj. Rhonda Byrd, Noncommissioned Officer Leadership Center of Excellence (NCOLE) Master Leader Course Chief gives a class to the Instructors assigned to the NCO Academy Hawaii on Coaching and the Project Athena Self-Development Tool. (Photo by Sgt. Christopher Thompson, Noncommissioned Officer Academy Hawaii)

strengths that can be leveraged to accomplish goals or identify areas in need of improvement.

Once feedback review is conducted coaches can assist Soldiers in **filling out the IDP**. This is the crucial step that assigns objectives and establishes short- and long-term goals. This is also where a “good” coach can have the most impact. The key is to enable Soldiers to answer all the questions themselves. This is also a key difference between counseling and coaching. In counseling, supervisors may establish goals for subordinates such as score 550 on the ACFT or shoot expert at the range, goals that may be section- or company-oriented. Coaching, on the other hand, helps Soldiers establish individual goals, which may nest with organizational goals, but it is important for coaches to understand the IDP is for the Soldier’s goals first and foremost and should not attempt to influence a Soldier’s goals. Remember to guide not dictate.

Once goals and objectives are established and the IDP is complete, either fully or partially, the **session can be closed**. Before closing, it is important to revisit the session’s objectives. Did the coach help the Soldier accomplish what he or she wanted to accomplish during the session?

The session closure is also a time coaches should use the Leadership principles of providing purpose, direction, and motivation to encourage Soldiers to fully commit to the IDP. Coercion should never be used during a coaching session, save it for a counseling session to maintain the integrity of the coach/Soldier relationship. This playbook can be very effective in an initial coaching session or when used in an institutional environment, for organizational scenarios, coaching steps can be significantly reduced as you will see in the next section.

Example Coaching Session

Scenario: You are Staff Sgt. Strong, a squad Leader, and a new Soldier, Cpl. Battle, just reported into your organization. Battle recently completed Basic Leader Course (BLC) and has a partial IDP which he started at BLC. During the initial counseling session, Battle said he would like to complete the IDP and put it into action to achieve personal and professional goals. He wants to share his Project Athena feedback results and is motivated but does not know his new squad leader.

Task: Strong will conduct an initial coaching session using the coaching resource card to stay on script. He will employ active listening and effective questioning to help Battle complete his IDP and put it into action.

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Preparation: Strong will pick a suitable location to conduct the initial counseling/coaching session and notify Battle of the location and time. He will prepare an initial counseling and bring a blank IDP to take notes on. He will allot one hour for the coaching session to ensure all areas are addressed and Battle gets off to a strong start in his new unit.

Coaching session: At the beginning of the coaching session, Battle produces a partial IDP and asks for help to complete it.

Coaching Session Script

Step 1: Introductions

Staff Sgt. Strong: Cpl. Battle, let me begin by telling you a little bit about myself. I’ve been in the Army for eight years, I’ve been a squad leader for two, and I’ve deployed once with the 1st Armored Division. I’m married and have two kids, a four-year-old and a two-year-old.

Cpl. Battle: Staff Sgt., I’ve been in the Army for three years and completed BLC right before I moved here. I am highly motivated, but I’ve never been in a leadership position before and I’m a little nervous since I don’t know the team. I’m single and live in the barracks but I have a serious girlfriend back home.

**Continue introductions as long as necessary but try not to go over five minutes to allow for maximum time to explore goals and assess feedback. Introductions should focus on Strong’s experience and expertise, this establishes credibility and assures Battle that his new team leader possesses the qualities needed to complete an effective IDP.*

**Because Strong was an active listener, he noted that Battle just completed BLC, so he has institutional training. He also said he has never been in a leadership position, and he has a serious girlfriend. It may not be time for effective questioning, but Strong can use this information later in the session if necessary.*

Step 2. Discuss Confidentiality

Staff Sgt. Strong: Great, before we get started let's go over session confidentiality. I want you to understand this coaching session is confidential and won't be shared with anyone. Also, if you decide to share your feedback results from Project Athena they'll also be confidential and are non-attributional, meaning they won't be used for promotions, schools, etc., they will only be used for your IDP. I won't share the outcomes of the session with anyone. Do you have any questions?

Cpl. Battle: I understand, no questions Staff Sergeant.

**This is an important step in establishing trust between the coach and the Soldier. Reassure the Soldier their discussion will not be mentioned outside of the session and they are free to talk about anything.*

Step 3. Discuss the Rules of the Coaching Session

Staff Sgt. Strong: Let's establish some ground rules before we look at your IDP. First of all, it's important to be honest and open with yourself and me. This helps the session be as productive as possible. We'll look at your strengths and weaknesses, so it's important to have a thick skin. We must be objective when looking at where you are in your developmental process, and this requires being critical and asking critical questions. If you're willing to share your Project Athena assessment feedback, we'll identify strengths and developmental needs to align your goals with objectives and set the conditions to successfully accomplish those.

Cpl. Battle: I understand Staff Sergeant. I'll be open and honest. I'm also willing to share my feedback results. I really want to make the IDP as good as possible.

**This step is important to set the conditions for the rest of the session. Honest discussion is vital to effectively establish specific and realistic goals and objectives.*

Step 4. Initial questions

Staff Sgt. Strong: Now that we've knocked out the admin requirements, let's get started. So, "What do you expect to get out of this session?"

Cpl. Battle: I'd like to get promoted.

Staff Sgt. Strong: Okay, I understand, you want to get promoted, is that all?

Cpl. Battle: Well, I feel like I'm ready to take on more responsibility and want to prove myself to my new team.

Staff Sgt. Strong: Great. I understand. Now let's dive in and see what we can come up with.

**At this point, the coaching session is off to a great*

start. By using active listening, Strong determined Battle is ambitious and wants to assume more responsibility, he can also see Battle is proud and wants to do well and impress his new team and squad. These are characteristics that can be leveraged to develop an effective IDP and will not only help Battle accomplish his goals, they will improve the squad and the organization.

Step 5. Assist Leader in Understanding Feedback

At this point Strong and Battle review the Project Athena feedback results from the Self-Assessment Individual Differences Inventory (SAID-I), the Social Awareness and Influence Assessment (SAIA), and the Leader 180 (LDR 180). This is where the coach and Soldier can talk about strengths and weaknesses and areas that can be leveraged to accomplish goals. One way to look at these assessments is the SAID-I tells Soldiers how they see themselves, this can be used to set objectives that can be leveraged to accomplish goals. For example, if the SAID-I indicates a Soldier is detail-oriented, then an objective might be to guide the Soldier to add teaching a class on a complicated subject to the team as an exercise, maybe something like Battle Drill #1. The detail-oriented strength could be used by the Soldier to develop a class that goes over all drill details for every member of the squad to include communications plans, rally points, etc.

The next assessment, the SAIA, or how the Soldier sees the world, is analyzed and if it shows Battle is only moderately skilled in social situations then Strong might guide him to use the Leader Self-Development Tool on CAPLs website to view videos or read literature on improving social skillsets. Lastly, the LDR 180 is examined and based on the results, leads to a discussion that leverages strengths and looks to improve weaknesses as identified by the Leader Requirements Model. For example, if the LDR 180 indicates Battle is strong in character, that can be used to instill discipline in the squad (taking care of Soldiers) and accomplish tasks (mission accomplishment). If the LDR 180 indicates areas of developmental need such as presence, then a discussion could revolve around training the squad on battle drills as noted above or leading physical fitness training twice a week. Both are useful to improve develops and presence.

The discussion in this step revolves around strengths and weaknesses. Strong can ask Battle what he thinks his strengths and weaknesses are, do they match the assessment feedback, what are some areas that he would like to improve, etc. Again, this is where active listening and effective questioning come into play. Listening to what Battle thinks about himself, where he feels he is and where he would like to be can help shape the IDP. Guiding the conversation along lines consistent with the team leader's expectations are useful in developing the IDP to focus on the stated short-term goal.

d1. COUNSELING DATES	INITIAL 20200409	LATER 20200702	LATER 20201014	LATER 20201218	d2. RATED NCO'S SIGNATURE STRAUCH-NICHOLAS JAMES C. Digitally signed by ...	d3. DATE (YYYYMMDD) 20210809
PART III - DUTY DESCRIPTION (Rate)						
a. PRINCIPAL DUTY TITLE HR NCO				b. DUTY MOSC 42A20		
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities, and dollars) Serves as a HR NCO for the Noncommissioned Officer Leadership Center of Excellence consisting of 465 personnel, 114 DA Civilians and over 511 resident Sergeants Major Academy (SGM-A) students; updating documents for tracking and the talent management of 292 military personnel; advises the Command on all HR related issues; establishes processes and procedures to conduct routine HR functions; coordinates directly with other agencies to include Military Human Resources Command (HRC), Combined Arms Center (CAC), Joint Modernization Command (JMC), and the Fort Bliss Military Personnel Division (MPD); responsible for ensuring the timely accountability of personnel, strength reporting, and personnel readiness; responsible for the health, welfare, and development of two Soldiers.						
d. AREAS OF SPECIAL EMPHASIS Distinguished Service Recognition (DSR); Unit Commander's Finance Report (UFCR); Unit Status Report (USR); Out Processing Class 70; In processing Class 71						
e. APPOINTED DUTIES Postal Clerk; Total Army Sponsorship Program (TASP); Site Security Manager; Key Control NCO.						

Figure 2: Example of Duties and Scope, Areas of Special Emphasis and Appointed duties for a 42A Sergeant. Note the many areas that could addressed on an IDP using the Leader Requirements Model.

NOTE: A way to guide the conversation might be to review an NCOER support form for a team leader – point out team leader expectations from the duty position description, key points can help create actionable objectives (see Figure 2). A doctrinal review may also be helpful but requires a little homework by the coach to review applicable doctrine.

Once feedback assessment reviews are complete, the coaching session can move on to Step 6.

Step 6. Assist the Leader in Creating an Individual Development Plan

This is the most important part of the coaching session. Put the discussion on paper and set things into motion.

Staff Sgt. Strong: Cpl. Battle, now that we've reviewed your strengths and weaknesses let's talk about your goals. First, let's take a look at your IDP. I can see here you want to get promoted to sergeant as your short-term goal and to staff sergeant as your long-term goal.

*These initial goals can lead to a number of questions, such as:

Why do you want to get promoted? Earlier, Battle said he was ready for more responsibility so that question was already answered.

Other questions might include:

What strengths did we discuss when reviewing your feedback that might help you achieve your goals? What weaknesses do you think we should address?

At this point Battle may or may not have a good idea what direction to go based on the earlier discussion, but talking during the feedback review would be a good place to start and could easily be used to fill in the rest of the IDP. Use discussion notes to assist Battle in completing his IDP, with

special emphasis placed on SMART (specific, measurable, attainable, realistic, and time-based) to complete goals and immediate actions. Include as much detail as required to set the conditions for goal accomplishment. Keep in mind the three insight areas, self-assessment, cognitive, and leadership are where all the objectives are located, the strengths and weaknesses identified that can be leveraged to accomplish the Leader's goals. Figure 3 is an example of an updated IDP.

This is a simple IDP but it provides specific measurable, attainable, realistic and time-based goals and objectives. It is the coach's responsibility to guide leaders through this process without telling them what to do. Therefore, it is important to use active listening and effective questioning, listening for the cues and then guiding the discussion to maximize the strengths identified in the project Athena feedback while also working to improve weakness by establishing concrete activities to address identified areas. Keep in mind the IDP is all about what leaders want to accomplish., Coaches serve as sounding boards and guides to identify actionable activities needed to help leaders accomplish their goals.

Step 7. Closing the Coaching Session

When closing the session, refer to Step #4 "What do you expect to get out of this coaching session?" Ensure the leaders are satisfied expectations were met and a solid IDP was created. Follow up periodically to ensure they

Individual Development Plan (IDP)		
(1) Leader's Name: CPL Battle		
(2) Short-Term Goals (Personal/Professional, 0-1 Year): o get promoted to SGT in the next year o be assigned as a Team Leader in the next three months		(3) Long-Term Goals (Personal/Professional, 1-4 Years): o get promoted to SSG
(4) Self-Assessment: Physical Fitness (ACFT 490 /APFT 265): o score 550 on ACFT o improve dead lift by 50 pounds o improve run time by 1 minute Self-Assessed Strengths: o detail oriented o teamwork Self-Assessed Developmental Needs: o introverted o social awareness	(5) Cognitive: Critical Thinking: o ask more questions Communications (Reading: Writing: Verbal) o do more professional reading Technical & Tactical Knowledge (Warfighting): o shoot expert on M4 o teach class on Battle Drill #1 asap o teach class on map reading	(6) Leadership: Competencies: o sustain character o sustain achieves Self-Awareness o improve develops o improve presence
(7) Immediate Actions (Next 90 Days): o improve ACFT score by improving dead lift by 50 pounds and improving run time by 1 minute - lead PT twice a week and conduct voluntary PT sessions at the gym of the weekends o Develop and conduct class on Battle Drill #1 and map reading to improve presence, and introversion as well as tactical skills of squad o use Leader Self-Development Tool on CAPL website to address introversion and social awareness, along with communication skills		

Figure 3: Example of a completed IDP (an IDP is never truly completed but this is a good starting point) after coaching in the operational force. Note the SMART goals and immediate actions, this IDP is also professional in nature but personal goals could be added just as easily.

are making progress on their IDP, recommend quarterly sessions at a minimum and **put a date on the IDP** as a starting point to measure time-lines are being met. Once everything is completed it is time for the Leader to act.

Conclusion

Taking care of Soldiers and accomplishing the

mission are two of the basic responsibilities inherent to NCOs and Project Athena's three pillars: Assessment feedback, coaching, and IDPs. Project Athena not only creates well-developed, critical-thinking NCOs that are lethal on the battlefield, but also provides an environment for reflection and growth, which is essential in growing a new generation of NCOs. ■

To read the previous articles in the Project Athena series check out the links below:

[Project Athena in NCO PME](#)

[Project Athena in Action](#)

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