

## TOTARA: COACHING IN TOTARA

*This is a transcript of a video on the Totara Academy*



### WELCOME TO THIS VIDEO ON SUPPORTING COACHING WITH TOTARA.

In this video, you'll experience one way that Totara can be used to support coaching from the perspective of an employee.

I'm logged in as Toni, who has a standard learner account in Totara. Toni and his manager, Kat, use a workspace to keep track of performance conversations and actions and decisions they've made during their regular check-ins.

Toni and Kat are the only members of this hidden workspace so that their conversations are confidential.

You can see in the discussion that Kat and Toni have documented some recent conversations about getting involved in equality, diversity and inclusion initiatives, which Toni has expressed an interest in.

Kat has documented this, and then identified an opportunity which she's shared with Toni in the workspace. Toni is looking for support, so Kat has suggested that he contacts a coach, as well as assigning him the relevant competency to monitor his progress.

Let's look at the coaching dashboard Kat has suggested.

On this dashboard, Toni finds an overview of coaching within his organisation. He can also see a snapshot of his own competencies, including the ED&I competency Kat has just assigned to him.

In this section, Toni can select a skill or interest to find out which coaches offer coaching in that area.

Here, you can see the coaches on the system with this interest, and then click through to find out more about them.

Toni can now see Lisa's profile, which includes information about her interests, where she's based, and her coaching credentials. This includes whether she is currently available for coaching.

As she is, Toni can immediately send Lisa a message to enquire about coaching.

Simply search for the user you're looking for and enter a message.

Let's imagine Lisa has now had the chance to reply, Toni can go straight to the new workspace Lisa has created and can see all of the ED&I resources she's shared with him.

Toni can also see the new competency he was assigned on his competency profile.

On selecting the competency, he can see more information about the competency, including the level he is currently at, as well as the achievement criteria, including the linked course.

As Toni works with Lisa and Kat to develop his skills in this area, he may also identify some personal goals. For example, during a recent check-in, Kat and Toni discussed this and added some goals which Toni can refer to here.

When it comes to Toni's formal performance review, they can review his progress against goals and competencies directly within the appraisal form and Kat can also seek feedback from Lisa as Toni's coach via a similar feedback activity.

So that's an example of how you could support formal coaching and informal coaching conversations through Totara. Why not try out some of these features to support coaching in your organisation today?

**End**

