

## Setting the stage

To prepare for a session, ensure you have reviewed previous learning goals.

Present the R2C2 ITM approach as an ongoing conversation about observations and co-creation of learning goals.

Coaching microskills\* are applicable in all phases.

Phases may not always be linear but often are iterative. You might find you need to return to an earlier phase.

## Phase 1. Build relationship

**Goal: To engage the learner and build mutual respect and trust.**

Relationship building is central. It may have been established previously (if longitudinal experience) but must be maintained throughout the session.

### Phrases and strategies:

*How has this rotation/clinic been for you? What do you enjoy? What challenges you?*

*What are a couple of areas you have been working on and what would you like me to focus on today?*

**Confirm what you are hearing, show respect, build trust.**

\*open-ended questions, active listening, promoting self-reflection, clarifying questions, paraphrasing, summarizing,

## Phase 2. Explore reactions and reflections

**Goal: To foster learner self-reflection, address emotions and begin to develop shared understanding of the experience.**

### Phrases and strategies:

Encourage self-assessment: *How was that experience for you? What went well? What were challenges for you? Did anything surprise you?*

Understand learners' perspective & integrate preceptor observations:

*Can you tell me about your thoughts on this?*

*I'm curious, when you decided to do [Y], what was your intent?*

*When I watched you, I observed [X].*

*I thought you did [X] well, but you seemed [upset, frustrated, flustered] by [Y]. Can you tell me more about that?*

When there are significant gaps in performance:

*What things do you wish you had done differently?*

## Phase 3: Confirm content

**Goal: To enable learner and preceptor to summarize and reach agreement on the focus for coaching.**

### Phrases and strategies:

*So, let's summarize what we have discussed so far.*

*Is there anything we discussed that isn't clear?*

*Would you like to add anything at this point?*

*Given our conversation, what areas would you like to focus on moving forward?*

For learner who does not identify a priority: *We talked about x, y & z, what would you like to focus on?*

Example: I think we agree that you need to focus on communication skills.

## Phase 4: Coach for change and co-create an action plan

**Goal: To ensure learner and preceptor agree on a specific learning goal and co-create an achievable action plan.**

### Phrases and strategies:

Set a goal: *Now that we have established a focus for learning, what specific goal should we work on now?*

Example: Now that we have decided to work on communication skills, I hear you say that you want to specifically focus on delivering bad news.

For learner who is having difficulty coming up with a specific goal: *It seems you may be unsure about what you want to work on; can I suggest that you work on [X]. Will that work for you?*

### Action Plan

*Describe a specific, observable change you intend to make.*

*What will you do to achieve this goal?*

*When will you begin?*

*What will you need for support? Knowledge, experiences, resources, people?*

*What might get in the way of making the changes?*

## Determine the follow-up plan

*Who are you working with next? Could they help you?*

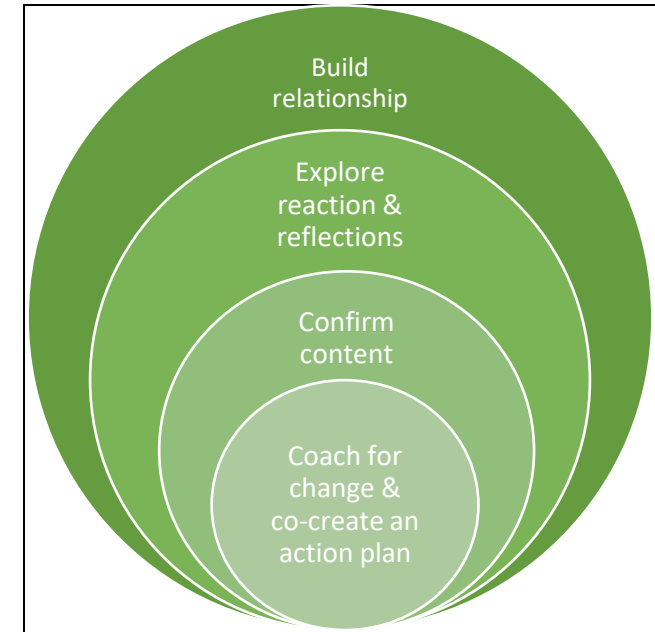
*When do you think you will see results?*

*How will you ensure you are on track?*

*Adapted from: Sargeant et al., Academic Medicine, 2015, 2018; Armson et al., Medical Education, 2019; Lockyer et al., JGME, 2020; Lockyer et al., Academic Medicine, 2023*

*Further information about the R2C2 model, watch the 'in-the-moment' videos and print the tri-fold:*

<https://medicine.dal.ca/departments/core-units/cpd/faculty-development/R2C2.html>



**R2C2**

**Evidence-Informed  
Facilitated Feedback and  
Coaching**

**“In the Moment” Version**