



Tech Coaching Guidelines

Best Practices

1. At the first session for a new topic, discuss what the member hopes to do with the new skill they are learning and identify for them any benefits they may not have mentioned. Research shows that people are more likely to learn a new skill if they understand the benefits that skill will bring to them personally.
2. If you are meeting virtually, find a way to share visuals
 - a. Screen share on Zoom
 - b. Take a screen shot and email or text
 - c. Take a picture with a cell phone and email or text
2. Be mindful of tech vocabulary:
 - a. Use everyday language, followed by the commonly used tech term (scroll, click, enter, icon, app)
3. Do only one step at a time; if you say, "do this AND this" or "do this THEN this," that is a two-part direction
4. Let the members set the pace; you (or another volunteer) can always do additional visits
5. Allow for wait time; it can take longer than you expect for some late tech adopters to execute a step; this does not mean they don't understand.
6. **Focus on guiding rather than demonstrating; people learn and retain by doing, not watching**
7. Encourage note-taking. If you are meeting virtually, this may include making sketches of the screen.
8. During a session, when a member goes back to repeat steps you have just worked on together, direct them back to their notes for their second attempt. You can step in if they are unable to figure out what to do from their notes. Please help them to revise their notes if they are unable to follow them.

9. Remind the member that they should continue to use their notes as a reference when they are practicing the tasks independently from you.

Practice Plan

When learning a new skill, many older adults have expressed a desire to work with concrete practice plans.

Setting up a practice plan:

1. Revisit with the member the benefits they hope to get out of learning the new skill.
2. Work together to come up with 2-3 specific ways they can apply the skill you covered in your session.
3. Encourage the member to reference their notes when practicing.

In the first 15 minutes of your next session with the client, check in on how the practice plan went:

1. What did they do?
2. How did it go?
3. Celebrate their successes.
4. Address any challenges they may have encountered.

Next Steps

Remind the member that they can schedule additional sessions to practice, dive deeper into topics where they already know the basics, or explore something new. When you meet regularly with a member and establish a rapport, the older adult becomes more comfortable asking questions and exploring new areas of technology.

The Tech Coaching Guidelines were adapted from training materials developed by [DOROT](#), a New York-based nonprofit focused on healthy aging and volunteerism, fostering connection, community, and a sense of belonging.

