GRACE TRAIL • STOP GIVING FEEDBACK • SYSTEMS THINKING • GENERATIVE VALUE

choice

the magazine of professional coaching

WHY DO WE COACH?

And how do we know if it's working?

EVIDENCE-BASED COACHING PRACTICES

Assessment tools based on firm evidence

TARGETING SUCCESS

Measuring the impact of the coaching experience

VOLUME 17 • NUMBER 1
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VOLUME 17 NUMBER 1

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From The Publisher

As I sat to write this, it was with the news that two amazingly great members of our beloved coaching profession have left us. It occurred to me that I could be sad and report from that perspective or be happy that we had them, remember our great memories, and honor their legacy. Then I realized I had the power of choice! So I chose the higher road; the one that makes me smile and recall those great memories.

Judith Glaser was a true pioneer with her book, *Conversational Intelligence: How Great Leaders Build Trust and Get Extraordinary Results* and her program of the same name. She was a regular presenter through WBECS (Worldwide Business Executive Coach Summit) and taught many people this amazing methodology. Judith also wrote for *choice* Magazine. We send our condolences to her family, friends and all those who knew her through her stellar work.

As well, Kay Cannon, MCC, passed away after a long illness. Having served with Kay as a member of the board of the International Coach Federation (ICF), I clearly remember her outstanding sense of humor, her ability to facilitate tough conversations gracefully, and her immense generosity of spirit.

In the months and years to come, we all should share our memories of Kay with one another and with ICF's global family. I know each of us has a story of how working with Kay impacted our lives for the better!

In partnership with many of you, Kay played a vital role in advancing our association's high standards globally and in helping to lay a strong foundation for ICF's future. She helped raise the profile of ICF and coaching worldwide and moved us forward as an organization and a profession.

Kay and Judith were passionate about demonstrating the transformative impact coaching could have on leaders and organizations. This issue of choice speaks in a coaching manner to that conversation. How do we measure and support leaders to be their best? We hope Kay and Judith would approve. •

"Kay and Judith were passionate about demonstrating the transformative impact coaching could have on leaders and organizations."

JUDITH GLASER

KAY CANNON

GARRY SCHLEIFER, PCC, CMC
CEO & PUBLISHER

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From The Managing Editor

This issue of choice is what editors like to call "meaty" – meaning there's lots to sink your teeth into.

Betska K-Burr kicks off our feature section on the theme of "Targeting Success: Measuring the impact of the coaching experience" with an article that asks the question, "should we use assessments in coaching?" Her answer is a resounding "yes," and she explains why, as well as which assessments and how to use them. Terry Hildebrandt follows with a feature about custom measures for coaching and how to track client progress.

Next up is Jeb Bates' article about the richness of qualitative data, followed by Jenn Chloupek on success factors to enhance coaching. The team of Richard Boyatzis, Melvin Smith and Ellen Van Oosten answer the questions: Why do we coach? And how do we know if it's working?

Richard Keith White examines evidence-based coaching practices and the use of assessment tools based on firm evidence. Phillip Sandahl looks at the use of assessment tools to accelerate team coaching. And finally, Pam Van Dyke explores the use of self in coaching.

Many of our columns and departments in this issue also deal either directly or indirectly with the concepts of success, measurement and assessments, so there's no shortage of ideas, learnings and perspectives to chew on. Bon appetit! •

JANET LEES, B.JOURN.

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The Best Use of Coaching in Your Organization

Where is your organization with your coaching program? What best practices are you employing? How effective is the coaching and how efficient are your processes and programs?

choice, the magazine of professional coaching and ThoughtAction have joined forces to help you assess where your organization is on your coaching program journey and how to get to where you'd like it to be. Our new consultancy can give you the answers that will take coaching in your organization to a whole new level.

Principals Jonathan 'Jeb' Bates and Garry Schleifer bring a wealth of experience not only to coaching but how coaching fits into your overall organization development.

Let's talk about what Choice Coaching & Consulting can do for you!
choice-online.com/corporatecoaching

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ThoughtAction

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> "The use of assessments is a must-do for coaches, as it instantly gives the coach credibility as a professional."

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Personal Power

A fresh look at our relationship with success

By Kat Knecht, PCC, CPCC

Sometimes, when deciding on a book to review for a particular theme for this magazine, I go searching far and wide. When I saw the theme of this issue of *choice*, "Targeting Success," I knew immediately what book I would choose.

Sacred Success – A Course in Financial Miracles, by Barbara Stanny (now Barbara Huson), was the clear choice. This lovely book is not only on my bookshelf but is well worn with lots of highlighted passages.

When it comes to measuring our achievements, money is an area that is often at the heart of what makes us feel successful. In this book, the author maintains that how we view and handle our money reveals volumes about our mindset about success. It is also directly connected to your own personal power.

This book presents the reader with a variety of practical tools and insights on how to create a positive mindset, be true to ourselves and fully own our power. A triple winning combo!

> "This book presents the reader with a variety of practical tools and insights on how to create a positive mindset, be true to ourselves and fully own our power."

The author introduces herself to us with the story of her own financial crisis. Her father was the "R" of H & R Block, a company famous for its tax preparation services. That did not prevent her from having a serious financial problem. She tells a fascinating story that underlines how easy it is to go unconscious about our finances and to believe that the problems lie outside ourselves.

The consequences she experienced, and the lessons learned, take the reader into the heart of the book.

There are three parts to this book. In each, there are stories, tools and exercises to help readers to not only understand what is blocking their success, but to learn how to make the necessary inner and outer changes needed to be financially successful.

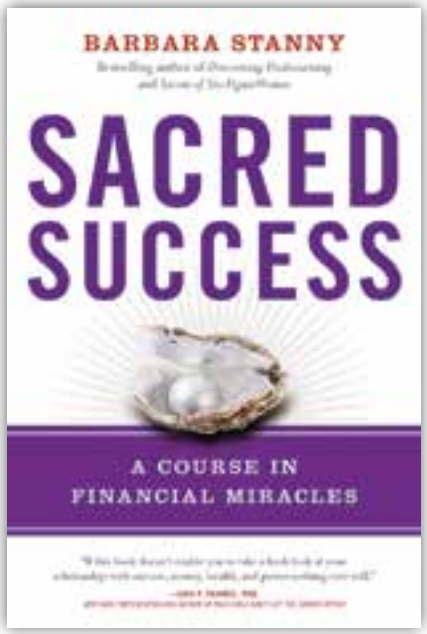
In Part One, "The Problem," the author defines Sacred Success as "Pursuing your soul's purpose for your own bliss and the benefit of others while being richly rewarded."

She presents the four core principles of sacred success:

1. Financial well-being is essential to achieving greatness
2. Our financial foundation is only as strong as our individual integrity
3. Power demands responsibility
4. Our power comes from one of two sources: Love or Fear

Part Two, "The Process," speaks to the heart of what we coaches know best: helping people connect with what they truly want. It includes many exercises, homework assignments and visualizations ... and even a really great values clarification list.

Last but not least, Part Three, "The Power," looks at the obstacles



that block us from achieving greatness and wealth. She breaks these down into four categories, naming them "The Four Pollutants":

1. Perfectionism
2. Impatience
3. Isolation
4. Guilt

Being able to identify these blocks and break through to the other side can be the hardest personal growth work of all!

The book concludes with an appendix that offers useful money management tools such as an expense tracker, money flow chart, net worth calculation and a vital financial information template.

I think this book is summed up well on the cover with this endorsement: "If this book doesn't enable you to take a fresh look at your relationship with success, money, wealth and power, nothing ever will." •

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COACH**GLUE**

By Marcy Nelson-Garrison, MA, LP, CPCC

When you have a variety of offerings beyond one-to-one coaching, your clients benefit and so do you. But where do you find the time to actually create those offers?

Enter CoachGlue. I know, fun name right? CoachGlue is a really cool company that creates "done-for-you" products and programs for coaches. What you purchase is the licence. This means you can call it your own, rename it and change it in any way you want

They have done-for-you coaching forms, workshops, planners and even blog posts. I've purchased a couple of their workshops and you really do get everything you need to launch it. You get all the training modules, worksheets & exercises, checklists and PowerPoint slides. If you've ever created a workshop, you know just how much work it is to do all of that yourself.

I especially love that you can sell your done-for-you workshop as an online program or an in-person event. You can offer it as a bonus for another program and you can mine it for articles and blog posts.

This is the best timesaver on the planet and it will definitely increase your bottom line. To get the most from it, check out their VIP Club. It's an awesome deal!

LEARN**DASH**

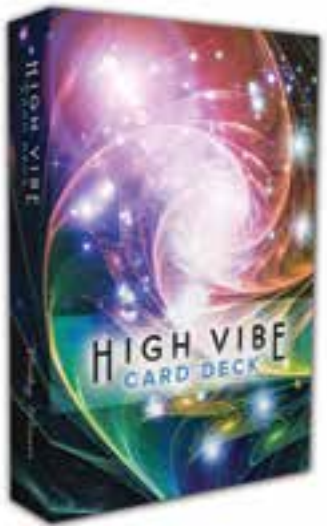
By Jennifer Gallagher & Bethany Wilson

If you offer online courses or are just thinking about it, you have to check out LearnDash.

LearnDash is a WordPress plugin that takes everything you love about online coaching and amps it up by about 100 percent. It has basic membership software features like time-released content, different access levels, ability to add videos and images, and mobile compatibility.

Where LearnDash really shines is when it comes to reinforcing learning. You can add quizzes, timers, forums, badges that people can earn after completing a section of content, certificates that can be delivered online and it integrates with just about any other tool you can think of including most shopping cart systems and email marketing tools.

To use LearnDash you'll need a WordPress website and an annual licence. Learn more and sign-up at intentionalfate.com/learndash.



High Vibe Card Deck

By Marcy Nelson-Garrison, MA, LP, CPCC

Energy is affected by so many things: what we eat, interactions with others, our work load, sleep habits, emotions and more. Often we don't realize our energy is out of whack until we are feeling frustrated or depleted. The new *High Vibe Card Deck* offers an awesome solution to get your energy back on track. Through simple and powerful activities, you will be able to shift your energy in the moment.

Each of the 60 cards offers an activity that will raise your energy. The activities range from nurturing your body to engagement with others to how you engage with yourself. There is so much wisdom in this deck that drawing a card daily and doing the activity will shift your life. You will experience more joy, more manifesting mojo and more access to intuition. How cool is that! Plus, the deck is so beautifully designed you will want to use it every day!

What an easy way to get your energy back on track. Whenever your energy dips, draw a card, and do what it says. I highly recommend this tool for you and your clients. It would be so easy to use on client calls or in groups.

Parenting - The Hero's Adventure

By Marcy Nelson-Garrison, MA, LP, CPCC

Parenting is a tough job and this inspired new card deck will make a huge difference for your clients. *Parenting – The Hero's Adventure* is a powerful acknowledgement of every parent as a hero and the transformational journey parenting can be.

The 48 cards help parents reflect on their ever-evolving role as parent. The deck reflects the classic hero's journey through three suits; Preparation, Journey and Return. Each suit offers questions from the perspective of four of the 12 archetypes. For example, the Journey suit offers questions from the Creator archetype, the Explorer archetype, the Lover archetype or the Destroyer archetype.

Here's a question from the Explorer archetype: "How do you support your child in seeking new experiences?" These are great questions that parents don't ask themselves. They invite curiosity, open awareness and provide insight. As coach, each question will open up a deep level of inquiry with your client.

I can see these cards used in one-on-one sessions or even as the foundation of a group coaching program for parents. The deck is beautifully designed, the suits and archetypes make it incredibly engaging, and the questions will inspire possibility and empower parents.

This is certain to become your favorite go-to tool when working with clients who are in the throes of parenting.

TAIL**WIND**

By Jennifer Gallagher & Bethany Wilson

If you're ready to grow your Pinterest and Instagram traffic (and who isn't?!) the fastest and most affordable way is to use Tailwind.

Tailwind makes Pinterest a breeze. Some of our favorite features include: the ability to pin to multiple boards at once, make pins appear again and again, and to upload multiple images at one time. Tailwind even has a browser add-on so you can pin anything you see on the web!

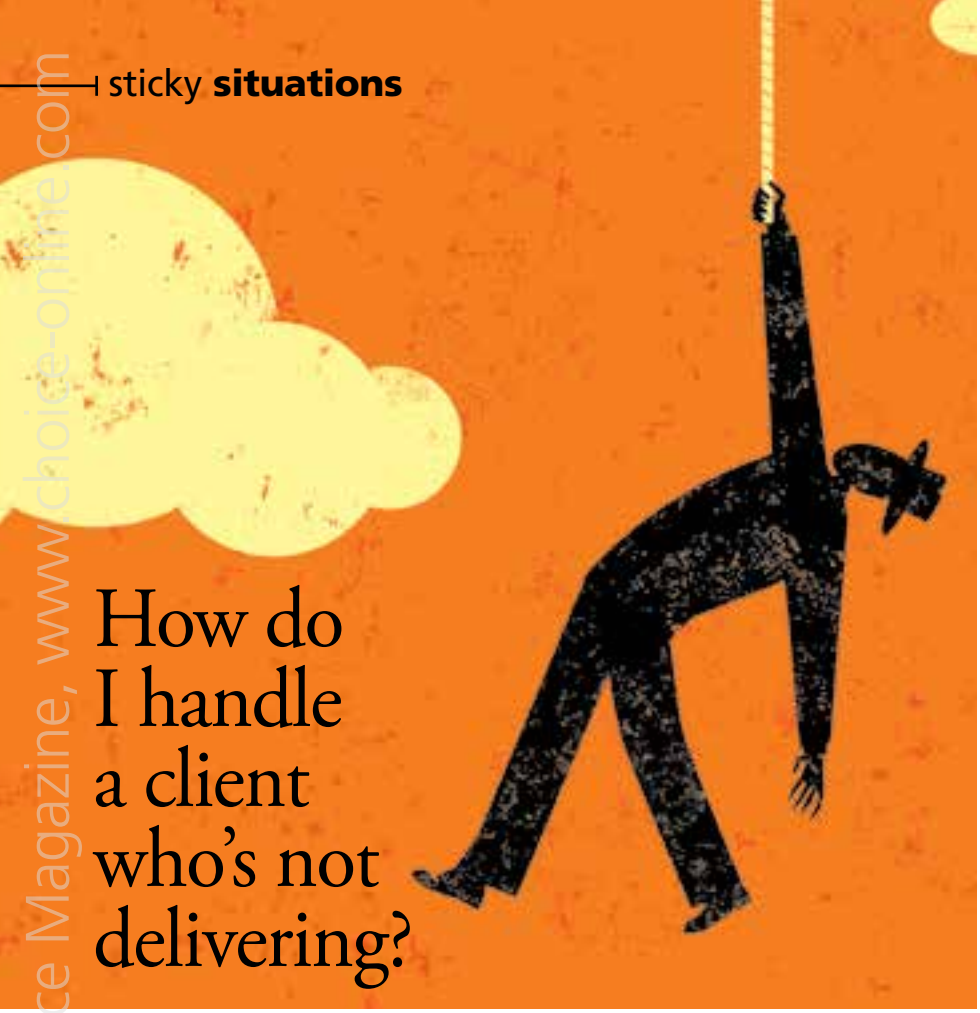
If Instagram is your jam, you'll love Tailwind's most popular hashtag finder, the ability to re-gram anything you see across the web, and easily schedule posts to both Pinterest and Instagram with just one click. Tailwind even has tribes (groups) you can join for free that will promote your content!

Between its reporting tools, ability to connect with Google Analytics, and the free marketing you can gain from tribes, Tailwind is a no-brainer.

If you're ready to make an impact on Pinterest and Instagram, check out Tailwind – we know you'll love it. Plus, you can grab your very own FREE 30-day trial AND save $15 off your first month by visiting intentionalfate.com/tailwind.

Links to products reviewed by Marcy are available at www.marcysproductreviews.com

Links to products reviewed by Jennifer & Bethany are available at intentionalfate.com



How do I handle a client who's not delivering?

THE **SITUATION**

"I'm coaching someone whose sessions are being paid for by the corporate client. The coachee is repeatedly not "delivering" what they've agreed to, such as an exercise aligning their stated development goals with the organization's strategic goals. Despite continued broken promises, the client has still not delivered. How do I work with her from here? And at what point do I include the corporate client? There's one session left in her "package" – do I put that on hold until she delivers what's outstanding?"

THE EXPERTS **WEIGH IN**

By Craig Carr, BCC, PCC, CPCC

There's a lot going on here and context is going to be everything. My best shot at helping unwind this sticky situation is to focus on you, dear coach, and not too much on the shortcomings or failures of the coachee.

Do you understand what's not working with the assignments? You've made this a very big deal and I get the feeling you've also made up a lot about what it means. What's so special about these assignments, anyway, that makes them more important than understanding the dynamics within this individual and between her and the organization?

I understand your "package" promises to accomplish some things involving the alignment of personal goals with those of the organization. Maybe her goals do align, and maybe they don't, but we may never know because she is throwing serious shade and complicating your objective. She won't play with you! What's going on?

What has – or is – undermining her trust in you and the coaching project? How is her behavior similar or different to the way she does her job? If similar, you've found important grist for coaching. If different, there's a whole other thing going on that is more about you and your relationship with your client.

What does she fear or mistrust about an external coach coming into the organization? Or is she grateful and hopeful, but wary of your motives? Does she resent the whole darn thing and is she willing to sabotage your efforts, consciously or otherwise? Does she also submarine her colleagues or teams and, if so, under what circumstances?

One conclusion here is that homework given to adults is doomed if it comes across like a school assignment to be checked off a list, graded, and filed. If you want this corporate client long term, I suggest you use the final session to boldly pivot.

You can choose to land between two poles: The first names that the coaching engagement has failed. You felt stonewalled and are left with no choice but to include that in your report.

The second is a humble reckoning to meet her in a way that could get the work done. You failed. You apologize. You ask her how the two of you can fix this. You engage her in what she wants you to report to the company.

For my report, I'd also be seeking answers to other questions, especially: What part does the organization play in creating this kind of dynamic? Is her behavior an anomaly, the usual, or a new trend?

When you get curious and see the whole picture for what it is, you'll be more valuable to the company than when you focus on fulfilling an agenda.

By Suzi Pomerantz, MT, MCC

If I'm reading your situation correctly, some very important conversations were likely skipped over. Specifically, check to see if you recall any of these conversations happening:

- the conversation for alignment,
- conversations for accountability, and
- conversations for integrity about the impact of broken promises.

If your client isn't delivering what she has agreed with you, imagine what else she's not delivering at work! Have you had that conversation with her?

I'm a little confused why you're at the end of the engagement and she hasn't aligned her stated development goals with the organization's strategic goals. How do you know for this coaching engagement if you're even working on the right goals if they aren't aligned strategically with the organization's goals?

Is there an organizational sponsor? Typically when the corporation is paying for the coaching, the boss or corporate sponsor will be involved at the beginning to clarify the goals and ensure alignment. Did that step not happen with this engagement?

Since you have put up with continued broken promises, you can't suddenly at the end start to hold her accountable or "punish" her by withholding her last session. It's too late in the game for that. In general, the first time a promise is broken, you must address it with the accountability conversation. When someone doesn't deliver what they've agreed to deliver, the conversation has to happen immediately to restore integrity.

Perhaps it's worth assessing if you are out of integrity as the coach in this situation. Generally, if you had addressed the first broken promise when it happened, and if it continued to happen, then by the third one you'd have included the corporate sponsor and ideally, renegotiated the coaching engagement, or the client's commitment, or recused yourself and referred another coach.

Your duty is to restore integrity now that you've identified the issue, albeit late in the game. You can do that by having a conversation with both the client and the organizational sponsor to declare the breakdown, take responsibility for your part in not addressing it sooner, inquire what else needs to be discussed to restore integrity, and re-negotiate the goals and intended outcomes of the coaching relationship.

If there is sufficient trust and relationship to explore extending the engagement or setting up a new one, that might allow you adequate time to address the behaviors you've observed.

Bottom line: if your client isn't delivering what she's promised, did she accomplish any of her coaching goals or intended outcomes? If not, your final session might be used to evaluate with her what she might have done differently to get value out of the coaching investment her corporation made in her, and help her to figure out how to demonstrate to her company a return on their investment.

By Victoria Trabosh, CDC®, CEC

You've described a situation that can easily occur when you're not regularly checking in with what you agreed to accomplish with your client. It is easy to go on auto-pilot with clients when you have partnered with them for any length of time, or haven't established an honest and genuine rapport, or both. Coaches don't act like therapists so there may be a level of casualness that occurs. But that's no reason for allowing this situation to happen. It is not a problem within the coaching industry per se; it is an issue with professional relationships that lack accountability. The lack of accountability allows the professional to take their eye off the ball; the goal. This scenario can also happen with therapists, doctors, lawyers, accountants, etc.

I am preempting my answer to the question because I believe context is important. Frankly, I believe it is a fail on the coach's part when this happens. Yes, the client has responsibility, but you are the one being paid to work on the stated and agreed-upon goals. If the goals are at all rigorous of course the client will try to abandon the hard work of getting better! She'll use her time with you to address an 'issue' for which you can just give some feedback. Time spent; goal avoided.

In this scenario, there is not much left to do. You can't cram all of the goals into a final meeting. I would use this meeting to 'put the skunk on the table.' Talk about what didn't work; find out why promises were broken and deal with your part in the failure. Yes, this is probably a pattern, not just with you, but your job was to help improve her performance, which might include accountability for promises made.

I would also meet with the corporate client and discuss what you did accomplish (after discussion with the client who articulates the value the coaching brought to her). She may never have been willing to work on the hardest issues and the coaching relationship may feel a bit punitive. By definition of a corporate client, the coachee is not paying for your services and may not value them as seriously as if it was her money on the table. These kind of frank conversations about your expectations, her commitment, and regular and consistent accountability check-ins will make your next relationship more effective. •

Are you grappling with a sticky situation?

You don't have to go it alone. Let our senior coaches give you some different perspectives to consider. Email your situation to: submissions@choice-online.com and put "sticky situations" in the subject line.

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Client Value is Generative

The diligence of measuring success

By Janet M. Harvey, MCC, CMC, ACS

There are three central reasons measuring success in a client engagement is not easy: limited awareness, poor clarity and insufficient alignment. We have an extremely limited amount of time with clients to catalyze new choices. We have zero contribution in between sessions toward the follow-through on new choices that a client may declare in a coaching session. Perhaps this is starting to feel daunting.

Being generative is more than producing new results. It includes learning about how a client produces, how a client creates new options to experiment with in terms of action and behavior and, when it's really in flow, being generative supports a client to originate fresh ideas, thinking and experiences.

Learning, creating and originating are the sources of client value we have the privilege to evoke in our partnerships so that clients up-level the results produced for self and others.

The classic coaching question, "What do you want?" is always a terrific starting point to measuring success. Add to this, "So, what can happen?" and we immediately support a client to move from an aspirational dream toward accountability to self. It is true that answers to these two questions are often challenging for clients to surface. We perceive clients as whole and resourceful until they can do this for themselves and repetition is useful!

MAXIMIZE YOUR CONTRIBUTION

When a client is limited in self-awareness, answers usually point to an external reason, e.g. "My boss said I have to change" or "We have to achieve better engagement scores." This outside-in orientation is not in the control of the client.

Choices made to change behavior and attitude are controllable. As clients tap into an internal perspective, a new experience and relationship to the situation that prompted the move toward coaching can emerge. Our commitment

to strengthen that new awareness is what allows clients to start to trust their gut, heart and head. Clients are able to broaden and deepen awareness of what is actually happening. The power of reflection allows clients to perceive what else could occur so that those external reasons for change can now manifest by changing behaviors and actions.

> "Tap into client wisdom and experience as a source of originating new ideas and creating options to experiment with as an alternative."

Clients who lack clarity about their internal motivation for learning and replacing an ineffective habit, often defend a current behavior by pointing to an external barrier to being successful, e.g. "I don't have enough time" or "Current commitments are not negotiable." Disempowering language and a powerless mindset are common obstacles clients bring to engagements.

Coaching those circumstances often manufactures more obstacles in the mind of the client. Choose instead to focus on generating more clarity about what internal motivation keeps the ineffective behavior in place. As clarity arises, be curious about what is important and valuable enough about the desired future for the client to take a risk and replace a current way of behaving with a new way.

Tap into client wisdom and experience as a source of originating new ideas and creating options to experiment with as an alternative. Through our curiosity on behalf of the client, we invite the client to declare the potential outcome. Keep going and ask the client to name how they will perceive progress as a result of pursuing that new option.

Dialogue with clients that focuses on expanding awareness and revealing clarity for internal motivation is always evolving. Clients build on insights that emerge over time and often completely transform an original goal or objective.

Success tied to a specific outcome rather *than building the capacity to generate that outcome*, will be extremely difficult to measure! How then does a client declare value gained or a coach determine value contributed through a coaching partnership? Alignment continuously focuses on what is the way of being that is both authentic and appropriate to the client context. This is the first answer to the "what do you want" question. The second answer is what can be developed through the coaching interactions so that the client implements that change in behavior in their day-to-day experience.

INCORPORATE MEASUREMENT

Every conversation with a person is an opportunity to incorporate measurement. Any of the measurement forms in the table below require that we prepare the foundation of success through expanding awareness, revealing clarity of motivation and allowing the client to declare what internal alignment sustains choices for change.

Each level of measuring is accomplished by invitation to the client. I challenge you to move beyond measuring satisfaction toward what generates greater client value.

Level three adds the element of achieving confidence and consistency with the behavior change. This is an excellent way to establish a baseline for each new behavior at the start of an engagement and collect data periodically throughout the engagement. While levels four and five are generally reserved for an enterprise, I encourage you to experiment here, too.

A recent client who was facing recovery from chemotherapy poignantly understood the value of his time and effort. He built some clear indicators for his well-being and tied those to the habits, behaviors and attitude he wanted to change through our coaching partnership. The return on investment is exponential for him now that he is six years later still in remission.

In order for clients to sustain the change they seek in their lives, personally or professionally, each must grant authority to self to pursue new choices and then accept responsibility to follow through. Our diligence to measure success is rewarded handsomely because the client gains awareness clarity and alignment about how to exactly achieve the impact wanted. Our generative contribution to client value is surfacing the awareness, clarity and alignment necessary for clients to lead the way. •

LEVELS OF **MEASUREMENT** FOCUS

1 Satisfaction with the coaching experience and the results of chosen actions.

2 Positive changes in knowledge, skills and attitude as observed by the client and others who engage with that client day-to-day.

3 Positive changes in confidence and consistency of on-the-job/lifestyle behavior that lead to desired progress toward outcomes outside of the coaching.

4 Positive changes in impact measures such as key performance indicators, employee engagement and fulfillment ratings and overall health in both personal and organizational contexts.

5 Net monetary benefit over costs of the coaching such as a percentage increase in sales produced by a leader or team exceeds the cost of the time spent in coaching and the fees associated with the coach practitioner, i.e. return on investment.

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Telling Stories

Using systems thinking to help your business clients attain meaningful outcomes

By Doug Gray, PCC, PhD

Throughout recorded history, for over 4,500 years, we have used stories to teach and entertain. Coaches use stories. Coaches teach to add value to clients. By definition, coaching is a collaborative process for clients to attain meaningful outcomes. Are you using stories to add value for your clients?

Here are two case studies that you can apply to your corporate coaching business immediately.

CASE STUDY 1

Recently I explained Systems Thinking to a client who owns a small leadership development business using professional actors. This CEO was struggling to articulate the unique value of his company. And he needed to prepare for a big meeting with a prospective buyer that could lead to a potential 500 percent increase above his previous annual revenue.

He was excited and scared. I mentioned leverage, Archimedes, and the idea that "with a big enough lever one could move the world." When he wanted examples, I told him a story about applied systems thinking that Macdonald, Burk and Stewart (2006) implemented at entrenched mining companies in Australia. Those

leaders were unable to see past the obstacles in front of them, such as safety incidents, high turnover and absenteeism, and erratic productivity costs.

When my CEO client wanted to find simple words to describe the cascading effects of organizational change, he drew a model with concentric circles like a bulls-eye. (I encourage you to take a pen or pencil and write this down. It is a simple model that works well.)

The smallest ring was unlabeled, to represent the chaotic core of deep change. The second outer ring was "individual" to represent the changes that leaders need to make. The third outer ring was "team" to represent the group of two or more people that add leverage. If that group has one scoreboard, then by definition they are a team. The fourth outer ring was "organizational" to represent the scope of leaders influencing others toward a better vision of the future. The core skill of such leaders is public optimism. So, I encouraged this client to find the words to describe a better future for his organization. He developed a story using a pebble dropped into a pool of calm water. This CEO client needed to know that others have applied leverage. He needed a simple structure that he could adopt. You can adopt this model immediately.

> "Leaders, by definition, influence others toward a better future. They find the words. They seek partners. They use leverage to gain results."

One result from his client meeting is that he literally "found the words" and developed his own story about leverage. He developed new marketing content. He improved his reputation. He asked for the business. Yes, he won the big engagement with that new prospect. And yes, he did grow his business 500 percent above the previous annual revenue. Outcome-based coaching is critical for any leader. Perhaps you can do something similar in your coaching business?

CASE STUDY 2

The second story encourages leaders to apply leverage to a bigger vision of a better future.

Like many International Coach Federation (ICF) members, I volunteer as a board member at our local chapter to plan annual activities. One of our colleagues leads the corporate Learning and Development group at Bridgestone Americas (a leading automotive company). She needed to develop programs using Systems Thinking. Specifically, she needed to prepare to replace an aging workforce, and had developed programs with the largest university in the state, using values from their company and partnering with the US Naval Academy and US Army at West Point.

They needed to teach essential leadership skills using their company values at a public university. Concurrently, Bridgestone needed to relocate 30-50 percent of their senior leaders from two other states to their new corporate headquarters in Nashville, TN, without losing significant intellectual capital or market capital. She was both excited and overwhelmed about the changes ahead for Bridgestone. She needed to discuss ways to apply Senge's (2006) model of a learning organization to those changes. I volunteered some stories to help her design solutions. My hope is that she has the executive sponsorship and required resources to implement systems thinking at that organization.

CONCLUSIONS

Notice the pattern? Leaders, by definition, influence others toward a better future. They find the words. They seek partners. They use leverage to gain results. Whether you are coaching a small business owner or a director in a large organization, you can help your clients attain meaningful outcomes.

The cornerstone of systems thinking is personal mastery, defined as "continually becoming" (Senge, 2006). In all major religions and most philosophies, there is a recognition that humans are aspirational. We stare at the clouds, stars and weather patterns and try to understand objective "reality." We stare at social media and fear-based stimuli and try to determine useful "facts." We work with clients who are stuck. We help our clients overcome perceived obstacles. Thankfully, humans are continually developing. Amid those chaotic stimuli, we tell stories to teach, entertain, and achieve meaningful outcomes.

As coaches, our primary role is to help others attain meaningful outcomes. Case studies are one way to help our clients make smarter decisions today.

A coaching query is: How are you using case studies or stories to help your clients attain meaningful outcomes? •

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TARGETING SUCCESS

Measuring the impact of the coaching experience

You can't know how far you or your client has come, or needs to go, unless you measure along the way. Instruments today can assess the client and the coach. What are the different types of tools available and what are they used for? How do you measure the effectiveness of your coaching engagement? How, when and what do you use to engage with your client to increase self-awareness? Join us as we examine instruments and methods you can use to support and enhance your coaching engagements.

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By Betska K-Burr, AMC (IAPC&M)

Over the past 20 years, I have met, taught, worked with and assessed the ability of coaches who fall into three categories:

1 They don't use assessments at all (some wrongfully think assessments are just a money grab).

2 They use assessments in a limited fashion. These coaches use assessments to help the client determine their strengths and areas of improvement in a given area of life. But after helping the client "decode" the results from their assessments, they basically think their job as a coach is finished. They don't help the client to enhance their strengths or develop solutions to their challenges.

3 They maximize the use of assessments by using them at the beginning and end of the coaching engagement. These coaches use the assessment results to help the client initially create a robust Learning and Development (L&D) Plan, then use powerful coaching methods to help the client overcome their challenges and achieve their goals. At the end of the coaching engagement, they use assessments as one way to calculate the client's ROI results – value received from the coaching engagement.

Our company finds that the use of assessments is a must-do for coaches, as it instantly gives the coach credibility as a professional.

I am both an executive and life coach, and therefore I offer my clients a wide assortment of assessments. In order to not overwhelm our clients, we invite them to select no more than five assessments at the beginning of the engagement. Assessments can take anywhere from 30 minutes to one hour to complete. Multiply that by five assessments, and you get the picture. At the end of the engagement, I usually invite them to re-do just two to three assessments as one way to determine their ROI from the engagement.

Types of assessments often used for executive and life coaching include:

ASSESSMENTS FOR EXECUTIVE COACHING

- Happiness in 7 Areas of Your Life
- Autobiography
- Communication Styles
- Rate the Health Level of Your Organization
- Business Management Competencies
- Values-Based Profile
- DiSC Behavioral Profile
- Time Mastery
- Leadership Skills
- Self-Worth
- Stress
- Sales Assessment
- Spiritual/Life Purpose

ASSESSMENTS FOR LIFE COACHING

- Happiness in 7 Areas of Your Life
- Autobiography
- Communication Styles
- Values-Based Profile
- DiSC Behavioral Profile
- Time Mastery
- Self-Worth
- Stress
- Spiritual/Life Purpose

Happiness in 7 Areas of Your Life

This assessment invites the client to give their perception of their happiness in all areas of life: career, family, social, financial, spiritual, intellectual and health. This is an important one for both executive and life coaching because a balance in all areas will help reduce stress and improve peace of mind.

Autobiography

The client writes out an autobiography of their life in order to remember the "learning" moments and the "happy" moments. This assessment jogs a client's memory as to the sources or root causes of unconstructive and constructive beliefs and patterns.

Communication Styles

Are we auditory, visual, action or auditory digital? Understanding communication styles is very valuable for both types of coaching. Let's say, for example, that a manager is visual and the employee is auditory. The manager processes information and makes decisions based on visual material (graphs, data, pictures), whereas the employee who is auditory may expect the manager to "just get it" by listening to the employee's argument. The "visual" manager may not process the information and thus the employee doesn't feel "heard."

Rate the Health Level of Your Organization

This assessment measures the emotional, intellectual, spiritual and physical health of an organization. It is fascinating to see the perceptions of both managers and employees!

Business Management Competencies

Clients benefit greatly from assessing their technical business competencies (left-brain skills) such as planning, prioritization, goal setting, analyzing, delegation, communication, budgeting, etc.

Values-Based Profile
Differences in values systems can cause challenges at home and at work. With this profile, we evaluate our right-brain or EQ skills by assessing how well we exhibit 19 specific values such as compassion, faith, love, honesty, courage, patience, integrity, trust, and forgiveness.

DiSC
This psychometric is highly recommended to measure our behavior in the workplace and/or at home. Once we see who we really are, we can decide which behaviors we would like to improve and which ones to keep and celebrate. For me, this is a must-do assessment as it brings the unseen into plain sight.

Time Mastery
We measure our ability to master our time in many areas.

Leadership Skills Assessment
This Leadership Skills Assessment provides us with extremely valuable data on how well a leader exhibits leadership competencies. Where the evaluation is low, the client is often compelled to address that competency with the coach.

Self-Worth
Yes, even the most senior leaders can have self-worth issues. Let's find the issues and coach them out.

Stress
We often have symptoms of stress (or distress), yet don't recognize them. An assessment is conducted on nutritional, health, time-stress, interpersonal and occupational stress. By identifying the origin of the stress, coach and client can work to immediately improve health and performance.

Sales Proficiency
Every leader and every salesperson benefits when they check out BOTH their sales competencies and their beliefs around selling.

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Spiritual Life Purpose
In the center of the diagram above is a yellow square that represents our purpose. Many of us walk around with a meaningless life. Once we discover why we are here on Planet Earth, a burden lifts and we find ourselves on a rewarding journey of service to self and others.

Are assessments valuable in coaching? You bet. •

Benefits to the COACH When the Client Conducts Assessments

- The coach better understands their clients. As they scan the assessment results, the coach quickly acquires a "picture" of the client's life.
- The coach connects with the client on a deeper level.
- With a client's robust L&D Plan in hand, the coach has clear direction from the client with respect to the top challenges/goals the client wishes to work on.
- The coach understands the client's objectives and results from the contract.
- If the L&D Plan has been completed before the 30 hours is up, coach and client can return their attention to the results from the assessments. There they will find lots of things to work on!

Benefits to the CLIENT of Conducting Assessments

- They become honest with themselves by affirming their areas of improvement in all areas of life.
- Challenges hidden in their subconscious mind can come forward.
- They articulate and prioritize goals.
- They identify the values they have not been receiving/receiving and not giving/giving.
- They celebrate the parts of their lives that make them happy and content.
- With a list of challenges and goals, the client can then develop a robust Learning and Development (L&D) Plan. An L&D Plan clearly articulating 6 Professional Challenges or Goals and 6 Personal Challenges or Goals will take around 30 coaching hours or one full year. At the end of the contract, the client can measure their return on investment from the engagement.

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CREATING **CUSTOM MEASURES** FOR COACHING

How to track clients' progress on action plans

By Terry H. Hildebrandt, PhD, MCC, MCEC

New coaching clients often ask me how we will track or measure progress during their coaching program. I always let them know that we will create the measures together.

Since coaching is such a personal and customized process, the system of tracking progress against the client's goals also needs to be customized and specific to the client's context, objectives, and actions.

Below I show a step-by-step approach to creating customized measures and targets for any set of goals, and the actions required to achieve those goals.

DEFINE THE GOALS

Goal setting is the first step. Goals are also known as objectives, development areas, or areas of focus. The coach needs to work with the client to understand what changes they are seeking in their life or work.

Writing down the goals helps clients get clear on what they want to achieve in the coaching program. Goals are often unclear when the coaching engagement begins. Questionnaires, reflection, and visioning can help to support the client in defining the goals.

For example, a leader might want to have more influence in their organization. After conducting several stakeholder interviews, the coach reports back to the client that political savvy is needed. The client decides to develop political savvy with their coach. The client also wants to improve their overall health, which becomes a second goal for the coaching program.

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CREATE ACTIONS TO ACHIEVE THE GOALS

Once the goals have been decided, the next step is to create specific actions to achieve each of the goals. Actions are created by the client, and the coach can often help brainstorm possibilities.

If the coach is not an expert in the topic of the goal, the client may wish to search out additional resources, such as a book, internet blogs, professional experts, colleagues, or mentors to come up with specific actions.

In some cases, the coach might want to refer the client to another coach that specializes in the area of interest. In this case, a wellness coach or leadership coach might be helpful. Alternatively, the coach might reach out to their own network for best practices.

Ultimately, the process of defining actions is owned by the client.

> Once the goals have been decided, the next step is to create specific actions to achieve each of the goals.

CREATE MEASURES OF SUCCESS FOR EACH ACTION

For each action, the coach and client work together to determine what measures would be most helpful for the client. Measures are not always numeric in nature. They may be "completion criteria" such as when the action will be completed; they may also be in the form of "proof points," which are specific outcomes or deliverables that can be verified.

Using self-assessment of progress (such as a 1-5 scale) or asking others for feedback can be very helpful for some actions, especially if the actions are subjective and qualitative. Defining measures is as much an art as a science in most cases.

There are powerful questions that a coach can ask when designing measures for actions.

- How will you know when you have made progress on this specific action?

ACTION PLAN WITH MEASURES AND TARGETS

GOAL	ACTIONS	MEASURE (PROOF POINTS)	TARGET	TRACKING PROGRESS
Develop Political Savvy	• Understand interests of key players • Build allies through developing relationships • Create a political strategy	• Create a map listing all the key players and their core interests • Self-assess the quality of the relationship on a monthly basis (use Red, Yellow, Green assessment) • Create a plan to address how to have more influence • Reviewed with mentor • Self-assess progress on a 1– 5 scale	• Map completed by Jan 15 and reviewed with Mary • 95% of key relationships are moved to Green in 6 months • 4 or 5 rating for every key plan	• 50% complete • Met with 10 key players • 50% Green • 4.5 average
Improve Overall health	• Change diet • Exercise 3 days a week • Get annual check-up • Work with a Wellness Coach	• Weight Loss • Caloric Intake • Steps Counted • Exercise Log • Doctor visited • Meds adjusted • Value of Coaching Sessions. • Self-assess on 1-10 scale. • Log of Goals achieved.	• Lose 20 lbs. by May • Maintain 1,800-calorie diet 90% of the time • 8,000 steps a day • 10 sessions a month • Physical completed annually • Medications adjusted at least annually • See coach once per month or 12 times per year • Score 9.0 average for rated sessions	• Lost 10 lbs. in first 2 months • 7,500 steps over last month • 8 sessions over last month • Doctor visit complete and meds adjusted • Sessions going well – 9.3 so far over 3 months and 3 sessions

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- What proof points will be evident as you work on this action step?
- What outcomes would you like to see as a result of the action step?
- What would success look like or feel like if you finished this action step?

CREATE TARGETS FOR EACH MEASURE

Once the measures are created, the next step is to define targets for each measure. The targets are specific milestones that occur at a specific time, frequency, or quality level.

For example, in our case study, the executive who wants to exercise regularly has set a target of 8,000 steps a day and 10 sessions at the gym per month.

Regarding the political savvy goal, the client wants 95 percent of their key stakeholder relationships to be evaluated as Green in six months. The client is tracking those relationships in a table offline while working to build these relationships. (See sidebar at left for other key goals, actions, measures, and targets).

REGULARLY CHECK-IN ON PROGRESS

Measures are useful only if the coach and client check-in regularly to document and reflect on progress. I highly recommend at least a monthly check-in for the Action Plan.

The last column in the plan is a place for the client to document progress and capture key insights, learnings, issues, and successes throughout the coaching engagement.

The client and coach can make real-time adjustments to the Action Plan as the client develops greater self-awareness of what works and does not work for them. New action steps can be added if needed and measures refined.

The coach may also want to add additional columns to the Action Plan to capture Support Needed or Barriers to Overcome. Using an Action Plan also has the benefit of the client celebrating their achievements over time and keeping a record of the effectiveness of the coaching engagement.

I also recommend that the client continues to use the Action Plan tool after the coaching program ends to maintain accountability for sustained results and performance.

SUMMARY

Measures can be created for any client goal. The collaborative process of creating an Action Plan that includes goals, actions, measures, and targets can support a client in creating a roadmap for success.

Using a well-designed Action Plan builds clarity, confidence, and accountability into the coaching engagement. Clients and coaches can use the reflection process of tracking progress to make course corrections and refine Action Plans to improve the likelihood of success in meeting the client's goals.

At the end of the coaching engagement, the client has a record of accomplishments to celebrate success and to document progress to other stakeholders if needed. •

> Writing down the goals helps clients get clear on what they want to achieve in the coaching program.

TELLING THE WHOLE STORY

The richness of qualitative data

By Jonathan E. 'Jeb' Bates, PCC, MSOD

As a coach working primarily in the business and non-profit sectors, I've noticed a trend over the past few years. My client organizations, large and small, have become increasingly obsessed by metrics, especially quantitative ones, for their operations, marketing, HR and even coaching.

I opine that the reason for this is that because they have the capability of gathering large amounts of data easily and quickly with today's tools, they want to do so. Social media and e-commerce platforms track everything and live or die by the data they generate moment to moment. This mentality has started to rub off in other ways in organizations. Having metrics data gives them confidence that they are achieving their goals and moving in the right direction.

Not that this is a bad thing. Understanding comes from data and this is useful in creating self-awareness for the client in coaching. However, I sense an emerging bias toward the quantitative versus qualitative data; that it is the numbers and statistics that tell the story.

Some coaches have moved in this direction with an increasing emphasis on being certified to use the power of quantitative assessments. I'm certified in a bunch (okay, I'm a certification junkie) because my clients like these kinds of data-based tools. But I think the numbers only tell part of the story.

Coaching colleagues sometimes ask me about whether they should get certified in this tool or that tool to work with corporate clients. I tell them, "Yes, but be selective. Choose wisely and don't forget about value of qualitative data (for which you don't need a certification)." In my mind, a qualitative data approach can provide richer insight than a quantitative one. Let's take a look at some examples.

THE QUALITATIVE 360

The online 360° feedback tools today are excellent. The 360° tools from The Center for Creative Leadership, Korn-Ferry, Leadership Circle and others do a fantastic job of easily administering and tabulating responses.

After many hours of providing client debriefs of data from these tools, I realized that I was delivering the feedback all wrong. Something told me to begin the client conversations by going over the comments provided by the evaluators at the back of the report from the open response questions at the end of the survey instead of starting with the data charts and ratings. Something amazing happened. The clients and I started conversing deeply about the issues and situations raised by these qualitative responses. We then dove into the numbers to see how they could further clarify what people reported. The qualitative aspect gave enhanced meaning to the quantitative.

These days, I actually prefer to conduct an interview-based 360° feedback assessment with the client collaborating with me to shape

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the questions to be asked based on what they want to know from the conversation I have with their colleagues. In pulling together the final summary report, I do a content analysis on how themes appear in the feedback, in addition to quoting the verbatim comments so the client has some sense of color and breadth of a given theme.

An interview-based 360° involves more labor. Thus, they cost more than their electronically-administered cousins. Some clients are willing to pay for that depth and richness, especially for more senior leaders.

POWERFUL BEHAVIORAL QUESTIONING

Like other coaches, I use some of the statistically-validated behavioral assessments such as Predictive Index®, DiSC®, Myers-Briggs Type Indicator® and others. I have found, however, that some clients resist being categorized and distrust the information. They protest with comments such as, "That's not like me" or "I'm different (or unique or special)."

Borrowing from the current emphasis in recruiting circles on "behavioral interviewing," as a coach I can ask the client behavioral questions like, "Tell me about a time when…?," "What was a situation where you were successful at…?" or "When faced with a similar choice in the past … ?" These surface an understanding of the client's thought processes and how they behave in situations where things work well for them (or don't). This can be as useful as a four-letter designation of their personality type.

INVENTORIES & HISTORIES

Asking the client to write out a history (work or personal) or providing worksheets and inventories to them designed to bring out the "what and why" of the client's experiences gives context particularly when starting a coaching relationship. As a coach, these inform my powerful questions on an ongoing basis and help me add nuance to what I am hearing and observing with my client in the present-day conversation.

> Quantitative data gives the client a sense of the scope and breadth of information and feedback while the qualitative data gives depth, meaning, and context.

VISUAL COACHING EXPERIENCES

I also like visually representing the information I gather from a client using tools that place data up on the wall. It is a great way to be able to stand back together with the client and see how various pieces of information relate to one another. The connections a client sees creates vivid sense-making for them (and you). And, because they gave you the data, they tend to accept the patterns and themes they see and not deny or resist them.

You can borrow from graphical facilitation with drawing techniques for use in coaching like Christina Merkley's Shift-It Coaching™. You can also use insight-driven, pre-created visual coaching tools like the Results Accelerator™ (formerly The PaperRoom™) and visual templates from The Grove and others so you can get the data up there on the wall without have to be an artist (or be embarrassed by your drawing skills). Visualizing this qualitative data, however, makes it accessible and meaningful to the client.

BLENDING THE VALUE

I believe the best value for the client is using some combination of qualitative and quantitative data. Quantitative data gives the client a sense of the scope and breadth of information and feedback while the qualitative data gives depth, meaning, and context.

Don't be afraid to expand your use of qualitative data in your coaching. As a coach, I want to use whatever will help my client see themselves more clearly, know their blind spots and turn insight into useful actions that help them attain the results they want from their coaching experience. •

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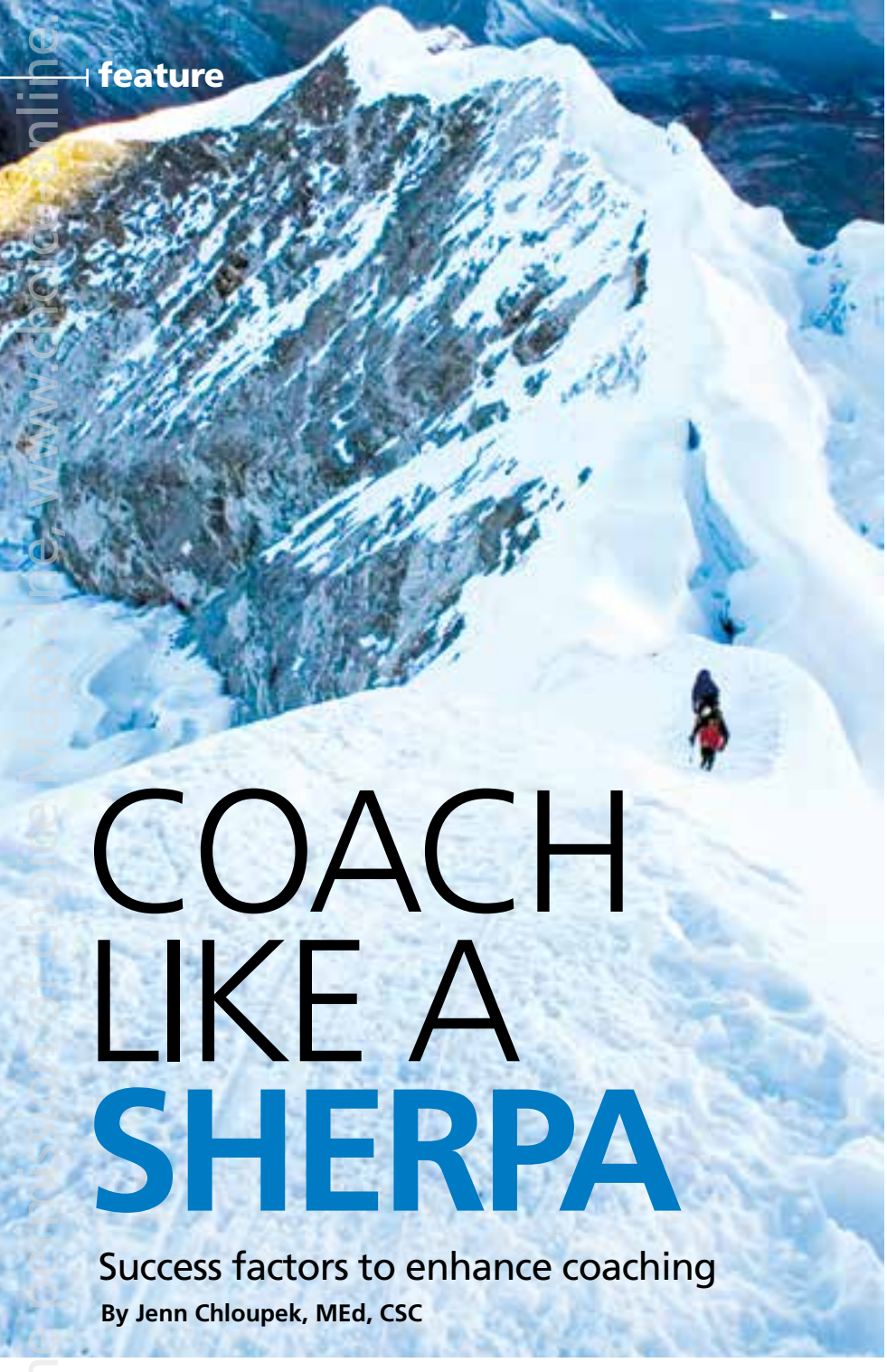


COACH LIKE A SHERPA

Success factors to enhance coaching

By Jenn Chloupek, MEd, CSC

In the Himalayas, the native guides that assist climbers to the top of Everest are called Sherpas. Sherpas have a global reputation because they know the inevitable dangers of the climb, predict the weather, and guide climbers over difficult terrain. Like any good coach, they offer suggestions, ideas and tools of the trade. They have the skills and resources needed for the climb.

An executive coach takes on the role of the Sherpa climbing guide: enabling, advising, and assisting in difficult environments and with limited options. Coaching clients, like climbers on Everest, must endure the hardships and put forth the effort involved in reaching their goals. Although ultimately the client must reach the summit through their own skill and determination, how does the coach (and the coaching process) measure success and effectiveness along the way? How and when does the coach engage with the client to increase self-awareness?

An effective coaching process puts into place several checkpoints to measure the effectiveness of the coaching engagement throughout the journey to the summit.

INVOLVEMENT OF THE EXECUTIVE CONTACT

From the very beginning – and throughout the process – the Executive Contact (EC), usually the client's boss, stays involved. The coach should start the coaching engagement by asking the EC to respond to questions regarding the client's strengths, weaknesses, how to measure success, what the EC has done to help the client, and more.

This initial checkpoint creates alignment. It increases awareness for the client and gives the coach information that could be helpful during the coaching process. It ensures that all stakeholders understand the goal and how it will be measured.

As the coaching progresses, all three (coach, client, and EC) should meet at least two more times throughout the 12-session coaching engagement. A second mid-term meeting ideally occurs around the midway point of the coaching session. The client fills out a self-evaluation, describing any changes they have seen in their behavior. The EC provides similar observations, and the coach and client talk about how to maintain those changes. This ongoing conversation creates a feedback loop of positive behavior change and positive reinforcement – driven by an acute self-awareness. The coach must guide this awareness.

The process continues with a final meeting after the last coaching session. They should continue the same conversation. The EC can

share their observations via the same questions from the opening session. By having these ongoing meetings during the coaching process, the coach can listen for 'success factors' from both the client and the EC. What success factors should a coach pay attention to?

SUCCESS FACTORS

This brings us to another big-picture tool used to measure the effectiveness of coaching engagements: 'success factors.' Climbers in the Himalayas trust the Sherpa with their lives. Executive coaches are trusted with their clients' *professional* lives.

Of course, establishing trust is easier said than done. However, it *is* a skill that can be learned. It requires certain attitudes and actions on the coach's part. A good coaching process relies on 'Success Factors' to help the coach check their clients' trust and commitment to the process – and to the coach themselves. These 'success factors' are your method, as a coach, to identify a successful coaching engagement.

Intrinsic factors measure how committed the client really is to doing the work. Extrinsic factors help the coach identify continuity and consistency: does the client's commitment continue and persist? Finally, environmental factors include outside perceptions and support. These environmental factors are crucial in increasing self-awareness because understanding others' perceptions is key to the process.

INTRINSIC FACTORS

(Commitment)

- ▲ Client is committed to the work – and says so.
- ▲ Client completes homework, journaling, and reflection.
- ▲ Client shows up for every meeting on time with journal in hand.
- ▲ Client responds to all your phone calls and emails.

EXTRINSIC FACTORS

(Continuity and Consistency)

- ▲ Client responds to your homework requests; including interacting with others.
- ▲ Client does work beyond the journal.
- ▲ Client immediately reports successes.
- ▲ A review of the ramifications page proves they are doing the work.
- ▲ Client works on the exercises and discussion.
- ▲ Client practices the tools.

ENVIRONMENTAL FACTORS

(Outside Perceptions and Support)

- ▲ Executive Contact participates in all three meetings: Primary, Mid-Term and Final.
- ▲ The Executive Contact has told you they have seen behavior changes.
- ▲ Client reports that peers have commented on behavior changes.
- ▲ Work on Perceptions Exercise is completed thoughtfully.
- ▲ Follow up on perceptions shows the client has acted on 'what needs to change' items.

How does a successful coaching engagement play out in the long run, and how can coaches and clients measure success?

IMPACT ON BUSINESS

People who work on their behavior will ultimately make different choices. They will be successful. Their power and influence can make their organization and its people happier and more successful.

The impact they have through these relationships can be remarkable. That's called a "positive Impact on Business (IOB)." It's a phrase that has replaced phrases like "Return on Investment (ROI)" in some circles.

Impact on Business is directly related to behavior. When someone displays positive business behavior, they are producing a significant improvement in the way things turn out for their organization. Delivering a positive Impact on Business (IOB) should be the ultimate goal for a coaching client. This simple formula tells you how to deliver the biggest impact, right where you are:

POSITIVE SKILLS + POSITIVE BEHAVIOR = POSITIVE IOB

Positive Skills: Leave skills out of the equation and performance will eventually fall short. Take an expert, well versed in her field, who is the vice president of IT in a large hospital. The list of skills the expert must have to be competent in their job is long. Now let's look at the other half of the equation.

Positive Behavior: Our vice president has five people reporting directly to them, with another 33 people reporting to them. The VP must lead, guide and motivate them. They will need certain positive behaviors: communication, delegation, problem-solving, follow-through, and approachability. The expert knows all the 'ins and outs' of their profession and needs certain positive behaviors in order to lead effectively.

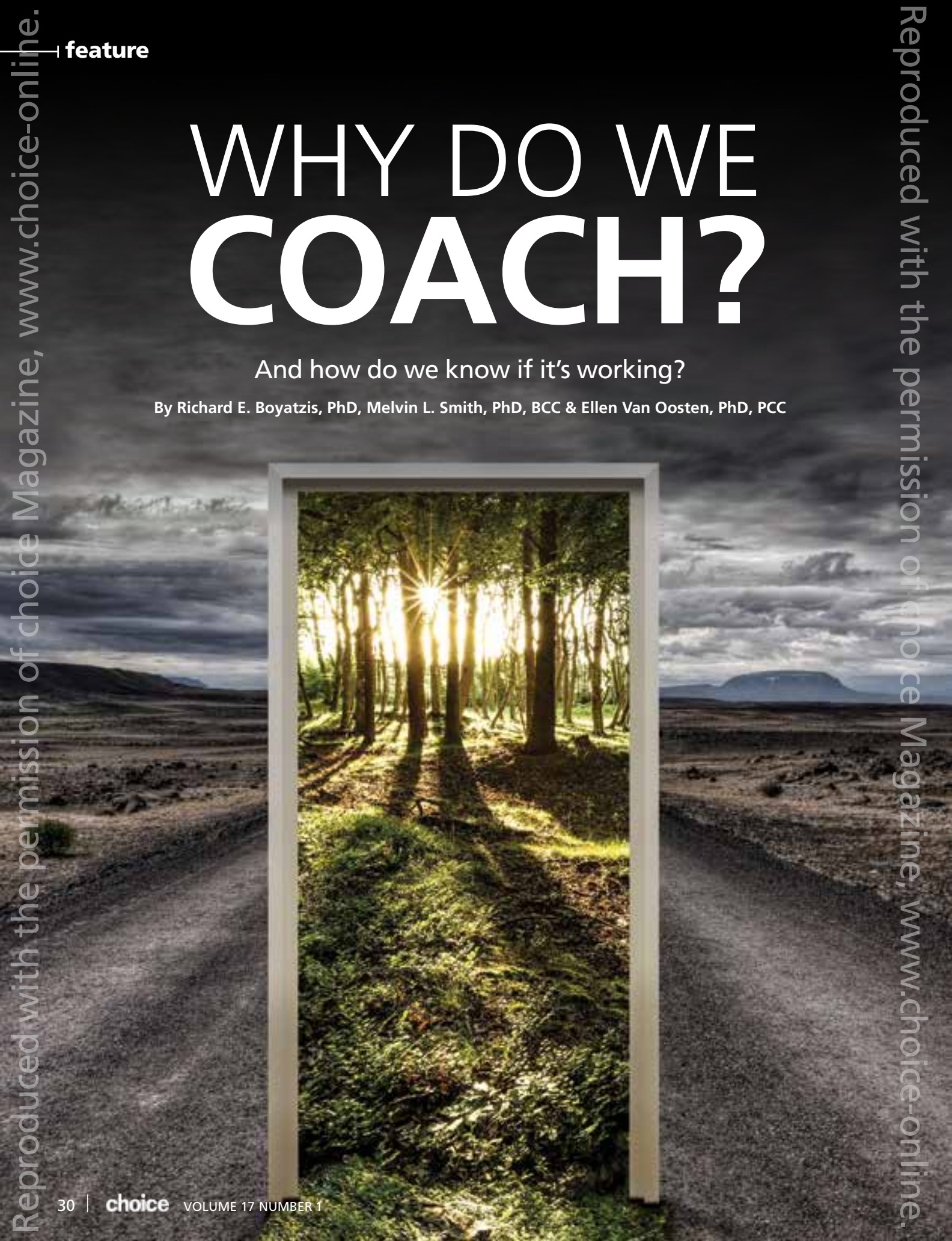
What happens to a person with great style and charisma, who lacks essential knowledge and experience? What about someone who has great technical skills and no personality? Either one will be a disaster. Both skills and behavior must be positive in order to create a positive impact on business.

That is where great coaching comes in, driven by process and experience, and equipped with all the tools of the trade – including those to measure success along the climb and after it. In this way, the coach can enhance the client's self-awareness by building trust as well as through ongoing self-evaluation and feedback from external stakeholders. •

WHY DO WE COACH?

And how do we know if it's working?

By Richard E. Boyatzis, PhD, Melvin L. Smith, PhD, BCC & Ellen Van Oosten, PhD, PCC



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We coach to help others. We want to help them discover and live better lives and enhance their contribution at work, at home and in society. While the same could be said of a good bartender, teacher, cleric or parent, how would someone coaching another person know or suspect that what they are doing is working?

Our research on coaching impact and process over the last 30 years shines a light on three desirable outcomes of coaching. First, we want to help someone discover, articulate and/or reaffirm their commitment to a personal vision and sense of purpose. Second, we want to help someone learn or change their behavior in ways that will bring them closer to their personal vision and sense of purpose. Third, we want to help someone create or maintain resonant relationships with others to assist in their change efforts. Achievement of any or some combination of these should be considered effective coaching.

By now readers may be wondering, what happened to the "presenting problem" that the client proposes at the beginning of the coaching process? The resolution of a problem is either a key part of the personal vision and better ways to get there, or it is irrelevant to the client finding a better life and more effective work.

Some coach certification associations and coach training programs claim that coaching ONLY occurs when the coach takes the client's presenting problem as the purpose and process for their time together. However, problem-centered coaching suggests that the coach has the answers. This approach is fundamentally flawed, as people are not simply problems to be diagnosed and resolved.

It's like a person feeling ill, checking Web MD and diagnosing their disease, checking the internet further and determining the best treatment and appropriate drugs. Then the person visits their internist and tells them what they are suffering from and how to treat it. We would label that process as unethical and irresponsible medicine. Why does anyone think that this approach would result in coaching a person to change in a sustainable way?

> Coaching within the context of a problem or to a specific goal dramatically limits the sustainability of the client's efforts.

Our behavioral, neurological and hormonal research and publications have shown that people are open to new ideas and others when they are in the Parasympathetic Nervous System arousal and Default Mode Network neural activation. We call the combination of these states the Positive Emotional Attractor (PEA).

We have gone even further to show and explain how coaching to the PEA is called "coaching with compassion." All other approaches that impose an intended outcome fall into what we call coaching to the Negative Emotional Attractor (NEA) and coaching for compliance. Coaching within the context of a problem or to a specific goal also arouses the NEA state and dramatically limits the sustainability of the client's efforts.

Two examples of executives who benefited from coaching to these various outcomes will help illustrate. These stories are brief versions of those appearing in our forthcoming book, *Helping People Change* (Harvard Business School Press, Summer, 2019).

CASE STUDY 1

Darryl Gresham was a vice president of IT at a mid-sized company. When asked to discuss his personal vision or dream for the future, he told of promoting Promise Keepers (a Christian-based organization for African-American men).

When pushed further about work in his desired future, he gave what the coach thought was an escape fantasy – driving a long-distance truck. It was an odd dream for a highly active and successful executive who had an IT placement service consulting company on the side.

Through a variety of exercises and questions, the coach helped Darryl articulate his dream of helping inner-city teenagers to see computers and IT as a way out of their life of limited options. Without jeopardizing his regular job and consulting business, Darryl began offering special workshops in the local high school and community college for youth from a local city that had some of the highest poverty and lowest literacy rates in the U.S. He felt energized and reawakened in life.

Darryl pursued his two jobs and avocation with a passion and enhanced his performance in all arenas. Helping him to articulate his personal vision was the most potent help his coach could provide Darryl.

CASE STUDY 2

Another highly successful executive, Bob Schaffer, was the top compliance and audit executive at a

major bank. But he had grown to be obese and it was threatening his life.

Working with his coach, Bob reiterated his desire to lose weight. His coach asked him to place this goal in the context of a personal vision. He began to see himself running marathons with his wife, looking forward to his daughters' weddings and spending vacations playing with future grandchildren.

Once his vision was in place for a revitalizing context of his goal, he began to examine different ways to work on the goal. One change in his typical behavior was to hire a personal trainer and begin working out three times a week with the trainer.

Bob lost over 100 pounds, began running with his wife and has kept fit for over 10 years. Meanwhile, his excitement at work grew and he took over a major function within which he is setting new performance standards.

In both cases, Darryl and Bob had developed a mutually caring and resonant relationship with their coach. Developing the competencies to create and foster such relationships was a new boost to their sense of efficacy. Along with their renewed personal vision, their sense of efficacy enabled them to sustain their efforts toward the new vision. The coaching was effective because each had shown progress on all three major desired outcomes of coaching.

The three types of desired outcomes of coaching are more than just a research agenda. They are at the heart of the integrity of the coach and coaching. The detailed psycho-physiological research has shown us the internal mechanisms that this approach to coaching invokes and provides a basis for sustaining efforts at change. Monitoring progress on all three outcomes following or during the coaching is essential to good coaching!

SUGGESTIONS FOR FURTHER DEVELOPMENT

Since this approach may not seem easy for coaches, further reading, reflection or study may help. But if you have an active learning style and want to try something with clients, the first step is to ask your new client, before any feedback or significant time spent discussing their problems or goals: "If your life were perfect in 10 to 15 years, what would your life and work be?"

Ask them to describe the image they see in their mind. If they get stuck, ask them to elaborate. If the person has trouble dreaming, ask them a more playful starter question: "If you won $50,000,000 after tax in the lottery, how would your work or life change?" •

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EVIDENCE-BASED COACHING PRACTICES

The use of assessment tools based on firm evidence

By Richard Keith White, MA, CLC

Coaches come from a variety of backgrounds: some come from the business world, some from counseling, while others come from academia. Each background provides a unique perspective. A coach with a business background brings a practical, pragmatic approach; a coach with a therapeutic background utilizes their prior-clinical experience; whereas an academic considers why something works.

The world of coaching operates under the radar. In this environment, a coach with no training or credentials can hang up their shingle and start a practice. Two articles, one in *Harvard Business Review*[1] the other in *Fast Company,*[2] refer to coaching as the "wild west" because of its self-regulated, unmonitored environment.

Stober and Grant's work, *Evidence Based Coaching: A Handbook* proposes that the move from fad to profession requires more than a code of ethics and best practices. Coaches need a foundation based on evidence, not innuendo; and hard facts, not presumptions.[3] An essential part of this foundation involves the use of assessment tools based on firm evidence.

THE ASSESSMENT TOOL

The use of the 'assessment survey' is commonplace for coaches. A recent Google search of coaching and assessment tools produced 73.5 million hits. Virtually every coaching website offers an assessment tool, and the tools are often used to market the coaching practice

Some assessment tools are developed by experienced life coaches; some are purely marketing tools; while others are developed using rigorous academic standards based on sound evidence.

As professionals, coaches must consider which assessment tool is appropriate for their situation. If a coach is going to use the assessment to get the ball rolling – that is, to start a coaching conversation – the validity of the tool may not be a concern. On the other hand, if the purpose of the tool is to measure or

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assess the client, the coach must use due diligence. The evidence-based tool is harder to find but it is well worth the effort. This extra effort pays off because academic assessment tools are typically described in a journal article. This gives the coach more bang for their buck.

PQECR

One such tool is the Perceived Quality of the Employee Coaching Relationship (PQECR). Gregory and Levy's article, "Employee Coaching Relationships: Enhancing construct clarity and measurement" describes the PQECR's development, it's purpose and leads to considerable insight[4].

According to the authors of the PQECR, the tool was developed to measure the coaching leader-subordinate dyad. This is defined as "a working partnership between an employee and his/her direct supervisor that is focused on addressing the performance and development of that employee."[5] This tool is not designed to measure the coaching relationship for executive, peer, or life coaches; it is designed to measure the managerial coach-subordinate relationship.

The PQECR measures the employee relationship utilizing four constructs:

It is not enough to know what the tool proposes to measure. Due diligence requires the coach to ensure the tool is reliable.

- genuineness of the relationship,
- effective communication,
- comfort with the relationship, and
- facilitating development.

One construct, the distinctiveness of the relationship, was also considered in the development of the tool, but subsequently eliminated by the developer.

It is not enough to know what the tool proposes to measure. Due diligence requires the coach to ensure the tool is reliable. Does the tool consistently measure what it is supposed to measure?

The most widely used measure of the reliability of a tool is Cronbach's alpha. The purpose of this discussion is not to train coaches to be statisticians; thus, it

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is enough to say an alpha between .70 and .95 is a reliable measure.[6] The developers tested the PQECR for reliability and found a coefficient alpha of .95.[7]

SHORTENED ORGANIZATIONAL COMMITMENT QUESTIONNAIRE

The PQECR was utilized in my quantitative research[8] along with Mowday et al's Shortened Organizational Commitment Questionnaire, which looks at affective organizational commitment as the emotional bond in a relationship.[9]

My research focused on one organization that employs millennial, entry-level workers. A review of the literature led to the hypothesis: "There is a correlation between leader-follower relationship and affective organizational commitment at [the organization]."[10]

The most interesting finding in this research was unexpected. No significant relationship was found between affective commitment and the leader-follower relationship. How could this be? Did the researcher misunderstand the literature, or did the assessment tools not measure what they were supposed to measure?

> Communication is more than talking and listening; communication is meaningful when it leads to action.

A further look at the findings answers this question. In my research, effective communication, as one construct, was found to have no significant relationship to affective commitment. Insight came when the researcher examined the three items that make up effective communication. The items listening and talking were found to have a significant, statistical relationship with affective commitment, but the third item communication did not.

How can this be? The supervisors are good listeners, the employees feel they can talk to their supervisors, but there is a lack of communication. This led me to suggest, "the coaching paradigm offers a divergent view of leadership than the traditional command and control hierarchy ... The employees (at the organization) perceive they can talk to their leaders and that they are heard but there is still miscommunication. This suggests that the employees do not perceive this discussion leads to action. This is due, in part, to the slow and deliberate nature of the hierarchy; the hierarchy resists change. [The organizational] leaders need to empower their employees with the physical and emotional resources they require to do their job. The leaders need to find a way to diminish the perception that a nameless, blameless hierarchy, with deaf ears, runs the show."[11]

Effective communication is a core competency for the coach. This research suggests there is another aspect in the communication process. Communication is more than talking and listening; communication is meaningful when it leads to action. In the research, the participants wanted it all; they wanted an emotional bond with their supervisor and they wanted their supervisor to exhibit organizational competence.

The construct, distinctiveness of the relationship, is not a reliable measure because of the nature of the leader-subordinate relationship. The managerial coach is after all the boss. The managerial leader of an organization has a dual focus. The managerial coach must balance the needs of the organization with the needs of the subordinate.

The coaching-leader may have the best interest of the subordinate in mind, but the subordinate perceives that the manager has a conflict of interest. The traditional standard coach-coachee relationship does have this potential conflict; thus, the distinctiveness of the relationship is more appropriate for the traditional coach-coachee relationship.

FINAL THOUGHTS

Coaches must recognize that the coaching conversation is powerful, and indeed, it is transformational when the conversation leads to action. A coaching conversation that leads to inaction, or merely more conversation, is not effective.

Coaching leads to action, and coaching leads to the development of the client's agenda. Effective coaching, action, and effective conversation are crucial to the effective coaching experience. •

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ENHANCING THE TEAM COACHING CONVERSATION

Using assessment tools to accelerate team coaching

By Phillip Sandahl, MCC, CTPC, CPCC, ORSCC

Fundamentally, our work as coaches takes place in the context of conversation. That's true for one-on-one coaching, and true for teams as well. With teams, the conversation will have multiple voices, and a more complex network of relationships, but basically, the process of coaching is the same. The question here is, how can assessment tools enhance that conversation so that clients – in our case, teams – improve their ability to achieve the goals they set?

THE TEAM COACH'S ROLE

In simplest terms, the goal of team coaching is improved team results. As team coaches, we understand that our role in that process is to create the conditions for engaged, open, productive conversation that leads to action, learning, and results. Because those results depend on the ability of the team to collaborate effectively, our focus tends to be on the dynamics of how teams work together. What the team is working on is less important than how they do their work.

The habits, routines and patterns of how the team works together are largely invisible to the team. The team is not aware that it operates as a system with unspoken rules of behavior. Those rules either support team effectiveness or undermine it. Much of our work as team coaches is to raise awareness so teams can see the behavior, evaluate the impact, and make new choices.

WHERE THE TEAM ASSESSMENT FITS IN

The purpose of a team assessment is to sharpen the focus of the team conversation in ways that are relevant to team behavior. Every assessment comes with a lens; that lens illuminates a way to see and understand the interaction patterns that lead to team results. There are dozens of assessment tools available to coaches – an abundant toolkit of different ways to leverage the conversation.

INDIVIDUAL PROFILES IN A TEAM CONFIGURATION

Many team coaches use individual assessment tools as a way to give team members insight into their personal preferences and their personal wiring for how they communicate with others, how they make decisions, how they handle conflict, and more. A team view is then created from the individual profiles so that the interrelationships are visible.

This approach helps team members understand the impact of style differences and has the ability to reveal the unspoken assumptions and expectations that are the natural result of those differences. Some individual assessments give a broad picture of style, preference, and personality and there are assessment tools that focus on more specific aspects of team-related interaction, such as communication styles, decision-making styles, different approaches to handling conflict, leadership qualities, etc.

Some individual assessments give a broad picture of style, preference, and personality and there are assessment tools that focus on more specific aspects of team-related interaction.

TIPS&TRAPS with Team Assessments

Assessment tools can be a powerful intervention and process accelerator in team coaching. Based on years of experience, here are four things to be aware of that can improve the odds of success.

1 BE AWARE OF "SURVEY NAUSEA"

In many organizations, employees are inundated with surveys and questionnaires. You can practically see the eyes rolling at the prospect of "one more assessment to complete."

Make sure the team is clear about the purpose and value of team assessment. Spend some time setting context, creating relationship, building comfort and trust with you as the coach.

Reassure team members, "It's a tool to help focus our conversation. This is not a judgment of the team; it is a way to set a baseline and direction for team development."

2 FOCUS ON THE CONVERSATION, NOT THE DATA

The data is interesting, especially to some team members, but it is not the point of the exercise. In fact, it can sometimes be a distraction, or even used as a distraction when team members would rather discuss the data than have the challenging conversation with one another.

Be prepared to be transparent about that possibility. A question to keep handy: "What's the conversation you want to have that's more important than the scores?"

3 APPLY TO REAL TEAM SITUATIONS & BEHAVIOR

Ultimately, the value of the assessment is its ability to open a door to conversation about what's working and what gets in the way or undermines the team's ability to collaborate.

Your biggest ally will be asking the team, "What is the behavior that explains this score? What do you see happening that accounts for that? What's missing? Six months from now, if the score goes from 5 to 9, what will be different?"

4 RE-MEASURE TO SHOW IMPROVEMENT OVER TIME

It is a natural human desire to want to see the progress the team has made compared to the original baseline. Be assured, whatever the scores are, it will open a conversation about what the team learned and will lead naturally to setting next steps.

This is an opportunity for recognition, celebration, and acknowledgment of the team's journey. By the way, if teams know there will be a follow-up assessment at completion it will get the team's attention and stir their motivation.

A review of those individual profiles in a team debrief or one of the ongoing coaching sessions is one way to explore a particular aspect of the team's work together. As team members become more aware of their own ways of operating and learn about their team members' ways, there is an opportunity to design better working relationships. This is a process that could be incorporated into the initial discovery process with the team or included later in the course of the ongoing coaching as the need and usefulness appear.

THE ASSESSMENT FROM A TEAM PERSPECTIVE

A second option is the assessment designed to reveal a picture of the team from the whole team's perspective: a team selfie. This is the system view of the team with a focus on the whole, versus the individual personalities or the dynamics between pairs of relationships.

With a team assessment there is an underlying shift in the conversation from "me and you" to what "we create" together and the underlying conditions that impact team performance. An easy way to think about this is to recall your own experience of a really great team you were on. Ask yourself, what were the qualities of that team that stand out; what were the attributes that contributed to an exceptional team experience?

Below are 14 qualities we have identified, based on extensive review of available research and our experience working with the TCI Team Diagnostic™ assessment over many years, with data from thousands of teams.

Other team assessments use other criteria; you might have your own set of team dynamic conditions for team effectiveness.

MEASURING TEAM IMPROVEMENT OVER TIME

One advantage of a team assessment is that it focuses directly on qualities that can lead to team improvement.

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COMPETENCIES NECESSARY FOR TEAM EFFECTIVENESS

- Team Leadership
- Resources (management)
- Proactivity
- Decision-Making
- Goals & Strategies
- Accountability
- Alignment
- Trust
- Respect
- Camaraderie
- Communication
- Constructive Interaction
- Diversity
- Optimism

It is an ideal tool for a coaching methodology that supports change over time. In a basic coaching model, the initial team assessment becomes a key to discovery; it sets a baseline, "We are here."

The scores from the assessment provide a way for teams to discuss the team behavior that the scores represent.

> Much of our work as team coaches is to raise awareness so teams can see the behavior, evaluate the impact, and make new choices.

For example, imagine a team score of 6.5 on Trust or Decision-making, out of a possible 10. There could be a thousand teams that score it the same, but every team will have a different story to tell of why that is so. This is the opening for team coaching. The obvious question: "The score is just a number. What's happening on this team that accounts for that score?" Then the follow-up coaching questions, "How is that working for you?" and "What would be another way?"

This is classic coaching. The discussion about what's working and what's not working leads to an action plan for ongoing coaching. Teams are held accountable for that action and learn from the action they take. This leads to new action, learning and improved team results.

With a team assessment tool, you also have the ability to show measurable results over time, comparing the baseline scores – where the team started – and the follow-up scores.

Individual assessments can make a valuable contribution to team improvement but the profiles will not show team improvement. The individual profiles will be the same six months later as they were at the start. Improvement in team competency is not what they measure.

It has been said before, "The action of coaching takes place in the everyday life of the client – in our case the team – and not in the coaching session." Our goal as team coaches is to maximize that short time available with teams to get the most out of the conversation, help the team get into action and to propel the team towards its goals. Assessment tools have the ability to sharpen the focus of the team conversation and accelerate the coaching process so teams move more effectively from point A to point B and it shows in the results they achieve. •

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YOU ARE THE INSTRUMENT

Use of self in coaching

By Pam Van Dyke, PhD, PCC

If you are reading this article, there is a good chance you didn't begin your career in coaching. In fact, in my 18-plus years of being involved in the coaching field, I have yet to encounter anyone who began their professional career as a coach.

We coaches are an eclectic group and we come from a variety of industries. I have witnessed this firsthand as I have traveled around the country speaking and attending various coach-related conferences that we are unlike other industries in that, our career paths tend to follow a winding road before we get to coaching. I have met human resources professionals, organizational development practitioners, industrial/organizational psychologists, real estate agents, engineers, salesman, academics, entrepreneurs, physicians, and a host of other professionals who have all found their way into the coaching profession.

The convergence of this eclecticism has brought with it different theoretical influences from different disciplines such as, sociology, anthropology, ontology, psychology, and others. This variety has allowed us to learn from one another in new and innovative ways. It has broadened our perspectives, challenged us to embrace new ways of thinking and has most especially informed our approaches.

My first career was as a psychotherapist. I grew up in the field of psychology where it was a requirement to do a lot of self-reflection. So much so that you didn't graduate or pass your practicum experience without extensive introspection and inner work. It wasn't just that we had to go through our own therapy, we had to practice the *art of self-reflection* at each stage of our academic maturation before being approved to advance.

I learned how one self-reflects in the beginning of their program will be different than how they self-reflect at the end of their program or at the time of their licensing or credentialing exams. It was engrained in me as a young professional in the field of psychology, how important it was to understand myself and the extent of my impact on others both as an individual and as a practitioner. I learned early in my career what it means to bring my *whole* self to the process, and for that I am grateful.

USE OF SELF EXPLAINED

Use of Self is often used in conjunction with *You Are The Instrument*. This is primarily because one's ability to be an *instrument* is in direct correlation with their ability to use their WHOLE self in the process, relationship or intervention.

The first time I heard the phrase *"You Are The Instrument"* was at an Organizational Development Network conference circa 2003. At the time, I understood the meaning of the phrase in general terms, but it wasn't until much later that I began to understand the full impact of what it meant on a much deeper level. As I grew as a scholar/practitioner and gained more experiences, my understanding deepened.

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It also deepened because I learned from some of the best thought leaders in the field of organizational development (OD), most notably Dr. Charlie Seashore, known to most in the OD field as a Luminary.

I met Charlie while completing my doctorate at Fielding Graduate University. He was passionate about practicing self-awareness and emphasized it every chance he got through educating those around him about the importance of *use of self* when working with clients. It was he who taught me and demonstrated what it really meant to be an *instrument.*

Here are a few of the things I learned from him about how to use your self as an instrument:

- **Know who you are** and stay current with yourself.
- **Bring your whole self** into the process with the client.
- **Understand your perceptions** and biases and how they can impact your client.
- **Possess the ability** to be reflective.
- **Embrace** feedback.
- **Have a deep intrigue** with what happens when we try to influence people, situations and their problems.
- **Be in the moment**, be conscious and intentional about our actions and behaviors.
- **Have the ability** to draw upon support systems in ways that increase one's effectiveness.
- **Understand your triggers** and when you get "hooked" by a client or their problems.

These descriptors are but a few of the many of Use of Self and tend to be understood by those who have deep understanding of themselves. The ability to capture the essence of this tends to resonate more with those who have a capacity for depth and possess a level of emotional maturity that comes with self-awareness and personal development.

In my experience, only a small percentage of practitioners reach a deep level of understanding as it relates to themselves, and this is especially true for early practitioners who have just completed training. This begs the question of responsibility as it relates to training and credentialing requirements.

COACH AS INSTRUMENT

Given the definition and context, the *what* of use of self as an instrument, is easily understood by most coaches. Where I have found variability and apprehension is in the *how.* Understanding *how* to demonstrate use of self within the context of a coach-coachee relationship seems more perplexing to coaches, especially those who have come from other disciplines not related to human behavior.

Coaches seeking the PCC credential must understand a variation of this because they must be able to demonstrate clearly the PCC – International Coach Federation (ICF) competencies. There are two ICF competencies that closely align with Use of Self concepts: competencies #3 and #4.

COMPETENCY #3:

Creating Trust and Intimacy – this is defined by the ICF as: "Coach expresses support for the client."

When trust and intimacy are present, it provides the client with the opportunity to delve deeper and thereby gaining more insight. One's ability to create this for and with the client is directly tied to the coach's own ability to get there themselves. It is difficult to take a client to a level at which you have never been – not necessarily impossible, just more difficult. This reinforces the connection with the principle Use of Self and the impact a coach has as an Instrument.

COMPETENCY #4:

Coaching Presence – This is defined by ICF as "Coach acts in response to both the *whole person* of the client and what the client wants to accomplish in the session."

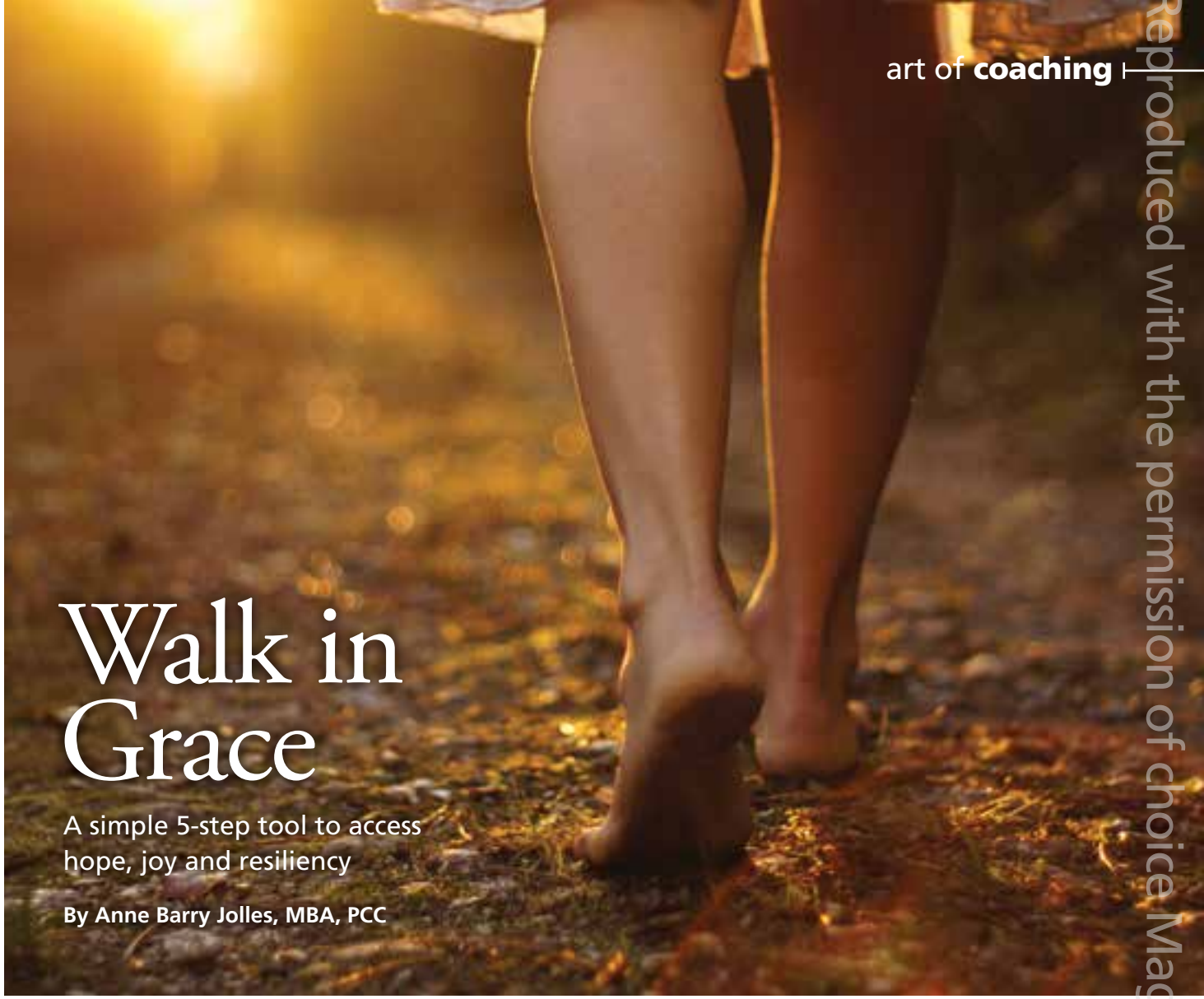
Coaches who possess high intuitive abilities have a keen sense of when they have created a presence with the client. Those who may lack strong intuitive ability can develop this ability in concert with the increase of self awareness and a steady dose of feedback. Again, this competency would be difficult to demonstrate without the Use of Self in the equation and the coach's ability to leverage themselves as an Instrument in the process.

> I learned early in my career what it means to bring my *whole* self into the process, and for that I am grateful.

IMPLICATIONS

Wrapping one's head around using yourself as an instrument of change may not be easy for some, especially for those who are new to the field of coaching or for those whose initial career path did not include a psychologically oriented field. However, it is an area anyone, regardless of background, can develop if they are inclined to do so.

In addition to having the desire to develop this area, more coaching schools should offer curriculum that examines these concepts and help new coaches to become aware of what Use of Self means and how to actively be an Instrument. •



Walk in Grace

A simple 5-step tool to access hope, joy and resiliency

By Anne Barry Jolles, MBA, PCC

Do you know the one thing that brings all of our coaching clients to our doorsteps? **It is hope.**

Our clients look to us as agents of hope, as partners with them on their mission to make meaningful changes in their lives and work. This is a privilege and is one we all take seriously.

HOPE & COACHING

The textbook definition of hope is "the feeling that what is wanted can be had or that events will turn out for the best." The difference between hope and optimism is that hope has a plan. As coaches, we work with our clients to find or create that path toward their desired future. Hope is the fuel that drives our dreams and helps us muster the courage needed to push beyond our wildest imaginations. It is the little voice that reminds us that it is all possible, and this is what we encourage our clients to nurture and heed.

But we're human, too. We all have days when our own hope is in low supply and we are feeling drained, with low energy. However, clients arriving for coaching expect and deserve that we be at our best, so we can make hope happen, together.

A COACHING CONTRADICTION

Our coaching world is built on the premise that we can move towards and create the life and work we desire as we assist our clients in focusing on what is in their control.

> "You'll find that you're walking off what weighs you down as you access hope and possibility"

To be honest with you, sometimes I find that message to be quite tiring. It fills me with an urgency as I want to make sure I am doing all in my power to embrace all the possibilities and work toward my goals… every day. When I feel that way, I notice that my energy level and focus falters, and I may not feel fully present in service of my clients.

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Do you ever feel that way? Can an activity not geared toward achieving goals ever be good enough? How about an old-fashioned day playing hooky, with a whole lot of day-dreaming and aimless wandering?

I find that wandering during the non-goal-directed moments is often where the gifts and rejuvenation lie. I refer to this as "grace."

The more I learn about grace, the more I understand that you don't have to have all of the answers. You can *be* the answer by living your life with curiosity, compassion and courage.

But how do we do this?

FANNING YOUR OWN FLAMES OF HOPE

How do you fan your own flames of hope so you can show up and coach in all your brilliance and grace? I asked some big questions and now I am going to offer answers and provide some relief to you.

I would like to share a way to renew yourself, both as a coach and as a human being, wherever you are in life, with a resiliency model called the Grace Trail. Coaches from all over the world are using this simple five-step process to become their own guides towards their personal and professional possibility. They are also using it in their work with clients.

What is the Grace Trail Resiliency Model and how can it help you and your coaching practice?

The Grace Trail is a simple process that begins with gratitude and ends with hope. Anyone can walk it or talk it anywhere, anytime, simply by asking the five Grace Trail questions. Tens of thousands from around the globe are already taking steps towards their best lives… and you and your clients can, too.

I created the original Grace Trail in Plymouth, Massachusetts, USA by gathering beach stones, writing the words and questions (below) on them and placing them along a one-mile trail that thousands have discovered and walked. Now, the Grace Trail has become a global movement, with trails popping up all over the world, including a reservation for indigenous people in British Columbia and in Egypt.

Gratitude:
What am I grateful for?

Release:
What do I need to release?

Accept:
What is calling out for acceptance?

Challenge:
What is my next challenge?

Embrace:
What can I embrace as possible?

HOW TO USE GRACE TRAIL

- Pause wherever you are in your life
- Ask one of the Grace Trail questions
- Listen for your answer
- Repeat as you move onto the next question

You'll find that you're walking off what weighs you down as you access hope and possibility. Starting this simple conversation helps you to get reacquainted with yourself and invites you into the present moment. You can "walk" Grace Trail while working, walking, journaling, dancing, doing yoga or in periods of quiet mindfulness … choose what works for you. Keep in mind that a good question can be the start of a great adventure.

We are in the business of helping others make hope happen in their lives. Now it's time to do the same for us.

We can only continue to do this courageous work if we regularly nourish ourselves on our own journeys to our best version of self. In order to be a true agent of hope for our clients, we must first be agents of hope for ourselves.

Welcome to Grace Trail … where your answers await your arrival! •

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Stop Giving Feedback

First because it's untrue

By Clemence Laporte, ACC

The concept of feedback is widely misunderstood. The starting point of a piece of feedback is a fact. Feedback is supposed to be purely fact-based and fact-oriented, meaning that it comes from a fact – something happened, and it is discussed as a fact in terms of what can be done differently.

Feedback should be discussed on the level of behavior and never on identity. When a client tells me, "I should give him feedback and tell him he is this or that," I always encourage them not to do so. Because feedback is fact-based, if you are tempted to start your sentence with "you are," you can be sure it is not feedback but a judgment or an acknowledgement.

Also, very few people really know what a fact is. When I am training managers on feedback, I often hear them describe a fact by saying things like, "he answered nastily." What does "answered nastily" mean? For you, it might be talking loudly, but for me it is with raised hands, and for my husband, it depends on the facial expression. We interpret facts through our own understanding of reality.

Let's make something clear: everything is true, in the reality to which it belongs. We think this way because of our values, our background, our DNA, and other combinations of things. In the example above, the initial fact was that "he answered with short sentences, without looking at me." Interpretation one: this is the way for this person to act "nastily." Interpretation two: this is the way this person speaks usually, probably due to a lack of self-confidence. As soon as you add an adjective describing an emotion or an adverb to a fact, it is not a fact anymore. It is your perception of a situation. And it is not feedback.

Ask yourself before giving feedback:

- What is the initial fact? When you deepen your perception until you find the "naked fact."
- What can explain this fact or behavior? What would somebody with different values think?

FEEDBACK IS USELESS

Noticing something is not a good enough reason to share. When sharing feedback, the intention is key. It is about setting expectations. Sharing for the sake of doing so isn't a feedback but an observation. With my clients, I am happy to use the "so what" process. "This person is not smiley – so what?" "It annoys me – so what?" And that's the point. What do they expect by sharing their thoughts? We need to be clear on the ideal situation. No expectation, no feedback.

Once expectations are set, it still might not be enough for change to

happen. In coaching, we usually say, "no demand, no coaching." What initiates change is the demand. I meet a lot of managers who say to me, "I constantly tell him to do/don't … and he does the opposite." I always ask if the team member has required help, or advice, or anything. The answer is very often no.

If somebody is not willing to change his behaviors or habits, nothing will happen. Without a demand, this is not a feedback but an evaluation, or opinion.

Ask yourself before giving feedback:

- So what? What do I want to achieve by sharing this?
- Did anybody ask for something? Is the person interested in hearing me?

FEEDBACK HURTS

Giving feedback has been trendy for approximately 20 years. In big western companies, we hear this stupid tagline "feedback is a gift." Feedback is a poisoned gift.

Giving feedback is often replaced by "thinking out loud" or "instant sharing." I always say, being honest doesn't mean sharing all of our thoughts. Feedback implies direct communication, which is a coaching skill. But, it doesn't mean unfiltered communication. We are living in a filter-less world.

In addition, by promoting feedback anywhere, anytime, to anybody (and putting it in incapable hands), we are slipping into a harsh world. Feedback became – who knows how – a tool of unfiltered communication. Using social or communication filters is simply being polite. Thinking out loud is not honest feedback; it is rude and inappropriate.

Feedback is not a gift; it is a weapon. Let's be honest: most people who are proud of sharing feedback easily are also those who are less recognized as nice people. What is the reason for that? Maybe, because what they call feedback are, in fact, judgments or criticisms. I have coached a manager, who, one day, told me: "I really try to help this guy; I am permanently on his back spotting all his mistakes. I told him that if he was late (or whatever) again, I will kick his ass." Nice.

> "As soon as you add an adjective describing an emotion or an adverb to a fact, it is not a fact anymore. It is your perception of a situation."

Coming back to identity versus behavior, being judged, or criticized, on our identity simply hurts. But, also, the way to say things, or to set things, hurts. Being on somebody's back or criticizing somebody is not feeding back, this is just mean.

Ask yourself before giving feedback:

- Is it direct or unfiltered communication?
- Would Mother Theresa (or any other nice person) do it?

FEEDBACK IS TIRING

Giving good feedback takes time. First, it has to respect five to seven steps and approximately 20,000 rules to follow in terms of communication, and potentially the same number of principles to remember.

Currently, I am asked to train managers on feedback within two hours. I do it because I think two hours is better than nothing. But when managers tell me "this is too hard," I answer that a proper feedback training is two days, plus regular recalls.

Once you have integrated the rules and principles and have to give feedback to somebody, you need proper time to prepare it. Once you are ready, the conversation itself (as feedback is a conversation) takes time. If it takes two minutes, this is not a clear and consistent feedback; it is a remark or a command.

Giving feedback is emotional because it calls on our emotional intelligence. I doubt that emotional intelligence is the main component of our relationships, at least based on what I have seen up until now. One of the aspects of emotional intelligence is playing with heart, which is not that easy. Feeding back requires talking from the heart, because of the perception, the intention, and the expectation.

We have all heard, "I was really angry, so I gave him some feedback." We should do exactly the opposite. Feedback should be surrounded by positive emotions only. Because there are hundreds of emotions, and we are usually lost in them, I always advise my clients to use kindness. Kindness is accessible for most people, and easy to understand from the other side. In my opinion, this is also a condition for sharing feedback. If this is not with kindness or a positive emotion, this is not feedback but sharing of emotions, a confession.

Ask yourself before giving feedback:

- Am I able to formulate my feedback with appropriate rules?
- Is kindness the emotion that is leading me?

I have heard a colleague saying to trainees, "feedback given imperfectly is better than no feedback." I fight for the opposite. Feedback should remain a coaching tool. Managers and leaders should be trained, and trained again on how to use it, and they should use it carefully. What companies call the "feedback grid" should remain what it is, meaning "evaluation grid."

We should never say feedback is a gift as that opens doors to unfiltered communication. Acknowledging people on an identity level is not a leadership skill. As my mother said, "If you have nothing nice to say, don't say anything at all." And if you feel you really have to say it anyway, call it by its name, which is not feedback. •

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2018 Capital Coaches Conference

ICF Metro DC Chapter delves into adult development, team coaching, improvisation

Celebrating the opening of the 2018 Capital Coaches Conference, l-r: Jim Sims, Conference Chair, President-Elect, ICF Metro DC Chapter; Jill Klein, Interim Dean, School of Professional and Extended Studies, American University (one of the sponsors of the conference.); Kori Diehl, Past-President, ICF Metro DC Chapter.

The ICF Metro DC Chapter, the largest city chapter in the International Coach Federation (ICF), hosted the 14th Capital Coaches Conference on October 19, 2018. Four hundred and seventy-five participants, most of them ICF credentialed coaches, convened in the suburbs of Washington, DC to delve into three high-impact and important topics in our profession: adult development, team coaching, and improvisation.

Jim Sims, the chapter's 2018-2019 President-Elect and the 2018 Conference Chairman, deftly handled master of ceremony duties. In a departure from our previous years' format, the conference was structured around morning and afternoon keynotes offered by internationally known Jennifer Garvey Berger (adult development) and Alexander Caillet (team coaching), each followed by two rounds of seven concurrent workshop sessions that expanded on the keynote topics.

Facilitators for these sessions were identified from our local community's rich resources of highly regarded thought leaders and practitioners. Topics ranged from theory to application to ethics, with high participant engagement the hallmark of our time together. Participants were drawn to the conference for the education and related 8.5 CCEUs, networking, and the opportunity to visit with dozens of coaching-related vendors.

Adult development theory and practice is increasingly becoming a staple in the toolkits of many coaches. For these coaches, it provides some insight into clients' meaning-making of their life experiences (past, present and anticipated) that may limit or broaden a person's view of what is possible into the future. For coaches and clients who see a world filled with volatility, uncertainty, complexity and ambiguity (VUCA), progression along a developmental path may lead to different options for reflection and action.

Participants at the conference considered the depth of knowledge and understanding needed to use adult development theory in their practices. Many finished the day with a commitment to continued professional education in this area.

Team coaching was the focus of our afternoon together. Alexander Caillet combined lecture and three live team dynamics role-play demonstrations in his keynote session to highlight the challenges of team contracts and communications, identification of the team mandate, and accountability among team members.

Topical team coaching breakout sessions again followed, led by local practitioners trained in the nuances of how to get teams to work more effectively together.

Carrie Spaulding led our final plenary session together in a lively and energetic reprise of the 2017 Global IFC Converge session on improvisation as a key skill for coaches. Are you someone who says "Yes, but…"? Or, do you "get in the game" and say "Yes, and…"? How could a switch to "Yes, and…" enrich your conversations with family, friends, and clients?

If a conference is in the future for your local chapter, these three tips may add to your success based on the feedback we received:

1 Leave more "white space" in the day for more one-to-one interaction among participants.

2 Set expectations for your breakout sessions based on the experience or knowledge of your participants, e.g. beginner/advanced, ACC/PCC/MCC. Provide a good mix for as many levels as feasible.

3 Plan for diversity in your keynoters and facilitators. Perhaps our conferences can be the means to expanding diversity in our coaching ranks across all demographics, while also showcasing diversity in thought-leadership. •

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Columbia University 2018 Coaching Conference

The 3rd International Columbia Coaching Conference was held on the campus of Columbia University in New York City October 17 to 19, 2018 and focused on the theme, "Systemic Coaching: Whole-Person/Whole-Organization Engagement."

Over the course of 2½ days, the conference brought together a global learning community of over 450 coaches, researchers, educators and development professionals to explore the current status of coaching to scale in, and for, organizations, and to co-create future possibilities during 15 concurrent sessions including research symposia, experimental learning workshops, coaching demonstrations, and new for 2018 organizational panel discussions.

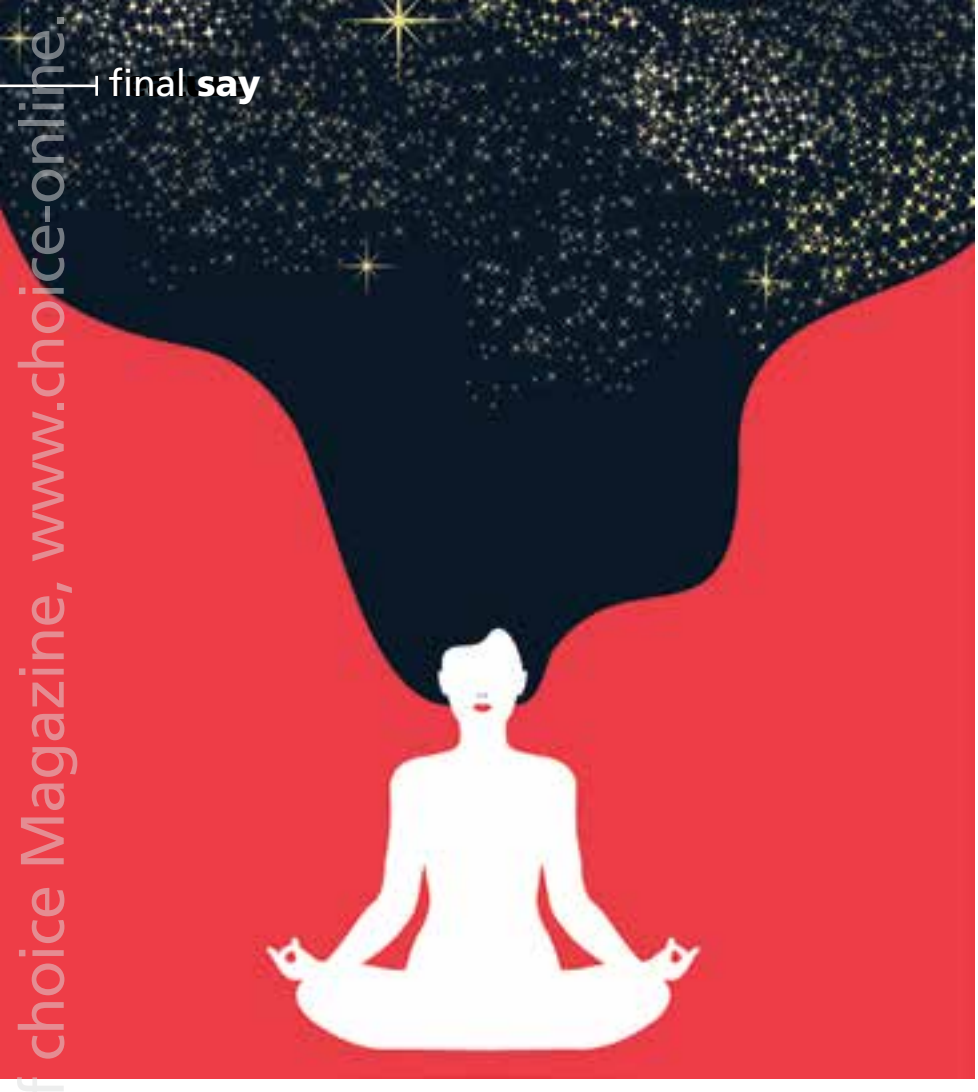
The event also featured keynote presentations aligned with this year's theme, including:

- **Judith E. Glaser** – Conversational Intelligence: The Foundation for Systemic Coaching
- **Sean O'Connor** – The Coaching Ripple Effect: Beyond the "Person-Centered" Approach
- **Daniel Goleman** – Emotional Intelligence and the Focused Leader: Self, Relationship, and System
- **Marshall Goldsmith** – Helping Successful Leaders Get Even Better: A Systemic Perspective on Behavioral Change that Lasts
- **Chris Washburne**, Associate Professor of Music at Columbia University and Founder of Louis Armstrong Jazz Performance Program – Systemic Coaching and Leadership: Lessons from Jazz

The conference was honored to have Judith join us, in what turned out to be one of her final presentations (she passed away in November, 2018). She leaves behind a legacy of evidence-based research combined with practical application.

The conference featured several firsts, including: on-the-spot access to content updates via an app; partnership with *Philosophy of Coaching Journal* to publish a special issue on "Systems and/or Systemic Coaching" (https://philosophyofcoaching.org/); and organizational case studies. •

1. The late Judith E. Glaser's amazing Opening Keynote on Conversational Intelligence.
2. The conference incorporated plenty of time and spacing for networking.
3. "Systemic Coaching and Leadership: Lessons from Jazz" included a performance that got everyone's toes tapping.
4. The concurrent sessions were highly interactive and informative.



Does Mindfulness Belong in Coaching?

Exploring a mind-body approach

By Nicole Lovald, MS, BCC, E-RYT

One of the most widely accepted definitions of mindfulness from one of its early pioneers, Jon Kabat-Zinn, is bringing your awareness to the present moment, without placing any judgement on it. When you think about it, that's not all that different than the coaching principles we've come to learn and practice within our profession.

As coaches, our job is to be fully present with our clients. If we are distracted and thinking about things not related to our coaching session, they can feel it and sense that we are not fully engaged. Likewise, if our clients are checking their text messages, preoccupied with their to-do list at work, or simply not fully available in the coaching conversation, we coaches can feel it.

For a client-centered coaching relationship to be effective, both the coach and client need to be equally present. For the coach to be subjective in their communication they must learn to set judgement aside and adopt an unbiased attitude of acceptance.

Enter mindfulness. Learning to bring your awareness to the present moment can help to set the stage for your coaching session. Taking a few moments with your client to become centered and aware of both their body and mind can assist them in being more authentically available in the session.

In addition, providing the opportunity for your clients to get out of their minds and connect with their bodies may give them information about how they are feeling. We tend to use our brains throughout the day, but rarely do most of us take the time to tune into our bodies.

> "For a client-centered coaching relationship to be effective, both the coach and client need to be equally present."

Our bodies don't lie. If we are feeling stressed-out, our bodies might be trying to get our attention by holding tension in our shoulders or causing our breath to be quickly paced. Yet most of us don't notice those signs. We ignore them until the stress starts to impact our health, our work, and our families.

Enter mindfulness coaching. Helping clients learn to recognize the messages their body is giving them can be just as beneficial as a coaching relationship focused on what their mind is saying. Better yet, combine the two and work from a mind-body approach. Both the body and mind share great information and can assist in helping a client uncover what is getting in their way, what it is that they really want in their life, and so much more.

As coaches, we believe that everyone has the answers to the questions they have for their lives within them. Sometimes those answers are difficult to uncover. Utilizing the wisdom of the body and the mind can assist both the coach and client in recognizing their strengths, their struggles, and their truth. •

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THE FUTURE OF COACHING IS NOW!

With *choice* Magazine

Here's what we're working on to keep you on the leading edge of what's happening in the coaching world:

V17N2 Breaking the Walls of Coaching

How are people outside the coaching profession using coaching? When and how can they use coaching? How do we bring coaching skills into all areas of our lives? How do coaches use coaching in all areas of their lives? Who needs coaching as a skillset? Join us as we explore coaching both for the non-coach and in non-coaching situations.

Article Deadline: Closed
Advertising Deadline: April 15, 2019
Mail Date: Mid-June, 2019

V17N3 Taking Care of Business

How do organizations decide that coaching is for them? Who is the decision maker inside the organization and how do they choose and implement a coaching program? How do coaches market and get into corporate coaching programs? What are the different types of coaching required in corporations? What qualifications and tools do you need to be a corporate coach? Join us as we explore coaching in corporations.

Article Deadline: June 1, 2019
Advertising Deadline: July 15, 2019
Mail Date: Mid-September, 2019

V17N4 What is this Thing Called Coaching?

How is coaching different from other modalities (consulting, speaking, therapy, psychology)? Where do coaches come from? Is there confusion within the coaching profession about life, leadership, business, executive coaching? What are the distinctions and how are they different? What are the similarities? Could this be why many coaches have challenges making a good living?

Article Deadline: September 1, 2019
Advertising Deadline: October 15, 2019
Mail Date: Mid-December, 2019

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