

Client Interview Schedule

William Bergquist

For all of the contact that most coaching clients have with other people during their career, these men and women rarely have an opportunity to talk candidly and exclusively about their own work and the values, aspirations and fears associated with that work. An open-ended, wide-ranging interview that takes place near the start of a coaching engagement will often assist an organizational coaching process by not only helping clients gain greater clarity regarding their own career aspirations and needs, but also helping to establish trust between the coaching client and coach who conducts the interview.

The client interview schedule listed below usually lasts for at least one hour and typically is held away from the client's place of work. The interview should not be held in the coach's office, at the home of the coaching client or in a location (such as a snack bar) that is more conducive to socializing than to serious introspection.

Typically, when conducting an interview one should make effective use of "people skills" (such as probing, summarizing and paraphrasing). Often, the most telling and important statements made by an coaching client come not from an answer to a clever question asked by the coach doing the interview, but rather from the stories and anecdotes that accompany this answer. An effective interviewer will test her understanding of a key word or phrase used by a client rather than assuming that she knows what the person being interviewed means by this word or phrase. A phrase such as "I don't trust people like I used to!" could mean many different things. One can test out the meaning of this phrase by asking the coaching client to recount a story from his own past experience that illustrates this change of attitude.

Of greatest importance is the interviewer's willingness to be helpful. Although in some sense an interview is a structured conversation, it is one in which the client is doing most of the talking. The job of the coach is primarily to help the person being interviewed clarify, expand and more clearly understand the implications of his clients' attitudes, values, and assumptions about her own work and the setting in which she works.

Client Interview Schedule

Following is a list of questions that might be asked of a coaching client—all or some of these questions might be appropriate to the specific needs, interests and circumstances of any one particular client:

1. Tell me about your first work experiences? What was your first boss like? Was this person supportive? Did this person give you much independence?
2. Tell me about your first experience in this organization? How would you describe your initial style of operating in this organization? How did you happen to use this style? How successful was it? Did you enjoy your first position in this organization? Why? Why not?
3. What is the formal job title and description of the position you now occupy? Now, can you tell me what you really do in your job? What would be a typical day for you on the job—or is there such a thing as a typical day?
4. When do you think you are at your best in your current job? What makes it work for you? Can you describe a specific incident during the last six months when you were particularly successful or effective? Can you describe some of the feelings that you experienced during this incident? What might you learn from this incident?
5. When do you think you are at your worst in your current job? What seems to get in your way? Can you describe a specific incident during the last six months when you were clearly unsuccessful or ineffective? Can you describe some of the feelings that you experienced during this incident? What might you learn from this incident?
6. Tell me about the primary goals and objectives that you hope to achieve through your current position in this organization? Some of these goals and objectives might relate to the mission and goals of the organization. Others might relate to the ways in which you would like to work with people or the ways in which you would like to treat other people and would like them to treat you.

7. What are some of the methods that you use to achieve these goals and objectives? How do these methods relate to your own early experiences as an coaching client in this organization?
8. How did you decide to assume your current position in this organization (or did you have any choice)? In what other occupations or professions have you engaged? What other types of work would you like to do in the future?
9. What do you enjoy most about your current job? What would a day be like in which you could do everything that you most like to do in your current job?
10. What do you least enjoy about your current? What would a day be like in which you had to do only what you most detest in this job?
11. Can you remember a time when you departed from your usual way of operating in your current job? What did you learn from this experiment? Were you very successful? Why? Why not?
12. How did you learn to do your current job? Who were your most important teachers or mentors? What were your most important life experiences with regarding to your way of performing your current job?
13. How do the younger employees in your organization differ, if at all, from the older employees? If there is a difference, do you treat younger and older employees in a different manner? Do you treat men and women differently in this organization? What about employees who come from different ethnic or racial backgrounds? What about employees who are disabled?
14. Who is the most effective leader in this organization? Who is the most respected leader? Who is the most successful leader? Why are these leaders effective? Respected? Successful?
15. Assuming you have children, would you like them to be doing what you are now doing in this organization when they reach your age? Why? Why not? What advice would you give your own children and/or other children who represent another generation about what it means to be a good member of an organization,

as well as about how they might be of value in this capacity to their own world someday?