The International Journal of Coaching in Organizations

ijco

Developmental Perspectives and Organizational Coaching

Produced in collaboration with The Hudson Institute of Santa Barbara

The HUDSON Institute of Santa Barbara

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Professional Coaching Publications, Inc.

Call for Case Studies for a New Book

Measuring the Success of Coaching in Organizations

A Partnership Project between the ROI Institute and Professional Coaching Publications, Inc. (PCPI)

Background

In the past decade, much progress has been made in measuring the impact and ROI in a variety of types of coaching programs. Individual coaches and coaching organizations have achieved success and we want to capture these success stories. Through a joint effort between the ROI Institute and PCPI, the parent company of the *International Journal of Coaching in Organizations*, we will publish *Measuring the Success of Coaching in Organizations*, a casebook that will feature studies that show the impact and value of organizational coaching.

Coaching has never been more important than it is today. With the pressure to deliver more with less, organizational coaches must ensure that programs are delivering value. This is particularly important for expensive, high-profile, and highly visible (even controversial) programs. Value must be expressed in terms that top administrators and executives understand. Today, this means impact, sometimes monetary value and intangible benefits, and, yes, the financial return on investment.

Case studies are needed for all types of coaching. Success is measured by:

- Reaction and Perceived Value
- Learning and Confidence
- Application and Behavior Change
- Impact
- Return on Investment
- Intangible Benefits

Cases will be considered if success is measured at any level. Preference will be given to case studies evaluated at the impact and ROI levels.

Each case study should describe the project and the surrounding issues and concerns that led to the evaluation. The methods used are fully described, including the data collection, analysis, and reporting. Ideally, case studies should show how the impact of the coaching (program) is isolated from other influences. The goal is to show credible case studies that will serve as examples and learning tools for others.

Publishing a case study in this new book is an excellent way to show the great work of many organizational coaches. It provides recognition and respect to the important and valuable coaching projects. It is also a great way to recognize those individuals who make the difference in designing, developing, implementing and supporting coaching projects.

Deadlines

The deadline for submission is July 31, 2009. Exceptions may be made under special circumstances if appropriate arrangements are made. The book is planned for publication in December, 2009.

For More Information

For additional information, including the detailed case study guidelines, please:
write Patti Phillips, ROI Institute, Inc., P.O. Box 380637, Birmingham, AL 35242;
e-mail Patti Phillips at patti@roiinstitute.net; or call (205) 678-8101.

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IJCO | The International Journal of Coaching in Organizations

A Developmental Perspective on Organizational Coaching [A Special Issue in Honor of Frederic Hudson]

Issue 3 2008

"Overall our society today is healthier than it is sick, and the quality of our lives is among the highest in the world, but we the people are no longer clear about how to find or sustain personal and social fulfillment within the world as we find it. There are new rules to learn for empowering our lives, latent in the very words we fear are our undoing: global chaos, discontinuity, and transitions. Our biggest challenge is to construct our lives and social institutions around the advantages and opportunities of the change process itself, starting with the microsystems of our lives: our lifestyles, work styles, family life, and community relationships."

From Frederic Hudson, "The Context of Coaching"

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Issue 3 2008

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The *International Journal of Coaching in Organizations* is a professional journal, published quarterly to provide reflection and critical analysis of coaching in organizations. The journal offers research and experiential learning from experienced practitioners representing various coaching schools and methodologies.

FROM THE DESKS. . .
Of the Co-Executive Editors

We are dedicating this edition of the ***IJCO*** journal to the work and contributions of Frederic M. Hudson, Ph.D., founder of one of the earliest coaching schools, The Hudson Institute of Santa Barbara, and Founding President of Fielding Graduate University. Hudson wrote one of the earliest books on the topic of coaching, *The Handbook of Coaching*, helping to establish the emerging field of study in 1999.

A social change agent throughout his career, he studied under Reinhold Niebuhr and Paul Tillich and was influenced by the works of Dietrich Bonhoeffer, Walter Rauschenbusch and others during his graduate years at Union Theological and Columbia University. He has long been interested in the possibilities that emerge for individuals and systems when the forces of change are combined with learning in order to facilitate development from the inside-out.

His seminal work, *The Adult Years*, highlights the multi-faceted complexities of development throughout our adult years and draws our attention to the essential nature of a holistic perspective when coaching adults. He views human beings as embedded in layers of human and organizational systems while simultaneously being driven by one's inner dialogue and sense of purpose at any point in the journey. Hudson created a model for understanding the powerful intersection of development and change that occurs in a cyclical fashion throughout our adult years. Major changes create the fodder for transformational shifts and more predictable changes provide impetus for incremental development.

This edition of the journal focuses our attention on the complexities of a developmental perspective in coaching. The challenge of change creates the crucible for development in our work, and most often the invitation and opportunity for change opens the door for the coaching engagement.

We focus on several dimensions of development throughout this edition. First, the theme of development implicit in our work with clients is embedded in each of these articles. The two introductory articles, one written by Frederic Hudson and the second by Pam McLean, lay the foundation for this entire edition. Hudson's article, "The Context of Coaching" is an unpublished essay that identifies the primary concepts that should govern the ways in which we lead our own lives and provide coaching services to other people. In "A Developmental Perspective in Coaching" McLean provides a summary description of Hudson's model of change and development.

In the next three articles, we explore the developmental phase of the client relative to specific coaching issues and challenges. Our third article, "Gen Y Leaders, Boomer Coach", by Sandy Smith, focuses on coaching young Gen Y CEOs and leaders in their mid-twenties and all that's unique about this phase in life while simultaneously approaching this work as a coach several decades older. Jim Sutton prepared the fourth article, "Coaching the High Potential Leader, a Developmental and Holistic Perspective", in which he examines the issues and challenges faced by mid-career high potential leaders in their thirties and forties. The fifth article, "Coaching during the Transitioning Fifties", was written by Janet Matts. She focuses on themes and unique challenges when coaching adults in their fifties and beyond as they face major changes in work roles.

We shift gears from the individual to the organization in our sixth article, "Developing a Coaching Culture at TaylorMade-adidas Golf: An Exploration of Lessons Learned." The three authors of this article (McHenry, Harrah and Berry) identify ways in which development plays an important role in successfully initiating, growing and maturing a coaching culture in an organization. We conclude with an article written by Dorothy Siminovitch and Ann Van Eron. "The Power of Presence and Intentional Use of Self: Coaching for Awareness, Choice and Change" focuses on building presence – the developmental perspective most foundational in our work as coaches – the growth and maturation of self.

We hope you find these articles to be filled with insight and inspiration—what better way to honor the work of Frederic Hudson.

Pam McLean
William Bergquist

Themes for 2008 Issues of IJCO

Issue Four: Contracting for Organizational Coaching Services

Themes for 2009 Issues of IJCO

The *IJCO* Editorial Board has selected the following themes for 2009...

Issue One: The History of Organizational Coaching: A Multidisciplinary Perspective

Issue Two: Organizational Coaching and Communications: The Leading Edge

Issue Three: Coaching to the Unconscious: Implications and Challenges for Organizational Coaches

Issue Four: Organizational Coaching in Financial Institutions

The Context of Coaching

FREDERIC HUDSON

It is becoming more and more difficult to connect the chapters of our lives to one another—from childhood, through the adult years, to elderhood. Likewise, it is more difficult than it used to be to navigate through careers and marriages and community connections. Our adult lives used to be programmed by more or less stable, linear convoys—careers, families, neighborhoods, churches, community organizations—that connected us as individuals to our entire life cycle. Our careers used to be linear progressions from apprentices to experts. Our organizations and communities used to feel "permanent". Today our lives have increasing amounts of instability, tentativeness, discontinuity, transitions, and cynicism about the future. The 1998 movie "Pleasantville" depicted a town that evolved from a one-dimensional, Donna Reed environment of innocence and rules to a sophisticated, multi-dimensional city of diversity and complex choices. Today, as Frederic Hudson notes in this article, everyone on earth is being drawn into increasing amounts of diversity and complexity. This sets the stage for new and challenging professional coaching strategies.

WE LIVE BETWEEN ERAS

For most of the twentieth century, the world we lived in seemed fairly dependable, uniform, and evolving—and so our lives took on those dimensions. The professions or work fields we entered were organized around the assumptions of a stable culture: perpetual progress, centrality of authority and control, following the rules. Today we are vividly aware—through interminable media coverage of every crisis on earth—that the world we live in is turbulent, unpredictable, and fragile—and our lives and communities are now internalizing those qualities. Compared with life in the mid-twentieth century America, our lives today are more complicated and tentative, and we are less optimistic and expectant. How could it be otherwise? The central force that shapes our consciousness today is change, change, change—coming at us from every direction, and in every aspect of our lives.

Slowly but surely, our perception of the world has shifted from a stable, orderly, steady-state model to an unstable, disorderly, change-driven one. Yet most of us live "as if" the steady-state model were fully operative, and we rage or whine when we find it isn't so. Most of us want and expect "life plans," "careers," and "work organizations" that will lead us with assurance toward definite "security, happiness, and financial prosperity." We expect to arrive at these three realities, as if they were destinations that had lasting power. Instead of learning how to fulfill our lives within the change process that now dominates our lives, we tend to view

our lives as "declining" from the promises the generations before us lodged deeply in our minds. It's time to change the paradigm.

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THE FOUR OLD RULES

The Linear Rule

This rule (See Figure 1) promised progress for those who are honest and work hard. According to this rule, our lives, careers, economy, and culture are supposed to get better and better, year by year, generation by generation—if we do our best and followed the cultural rules.

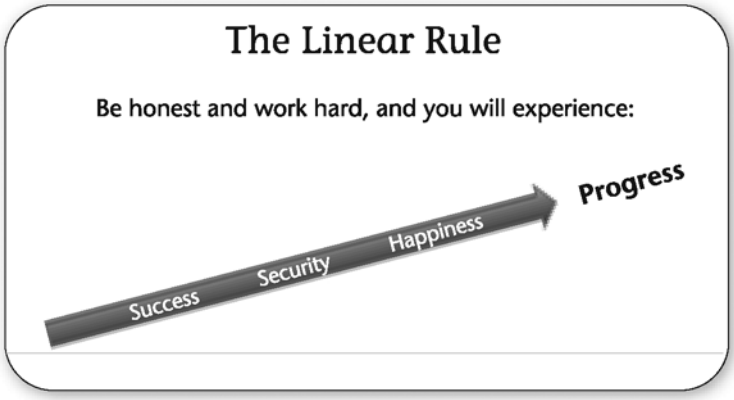

Figure 1. The Linear Rule

In the world before television and wide-spread travel, most everyone believed in this prescription: stay put, follow the dictates of your leaders and elders, and remain committed in whatever you are doing (career, marriage, family, community roles).

The Steady-State Rule

This rule (see Figure 2) promised that if we work hard we will each arrive at a steady-state or plateau of security and happiness for the rest of our lives. That was the deal, like a cultural reward for falling into line. When I was a boy, I saw the adult years as a steady-state period of stability, achievement, and devotion. Everyone I knew thought that there was an automatic and

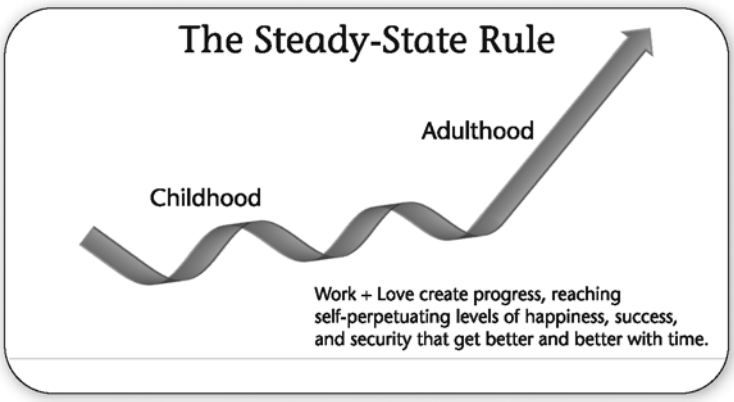

Figure 2. The Steady-State Rule

permanent shift when the searching childhood stages of development ended and the steady-state, adult years began. "Progress" was the only cultural direction that was thinkable. Everyone I knew had one marriage, one career, and, for the most part, one geographic location.

The Outside-In Rule

This rule (see Figure 3) said our personal lives are defined and determined by the directives of the society around us. From this point of view, the boxes of life around us shape and determine our personal choices. Nobody talked about "life planning" or "coaching" because people thought their lives were already planned and secured by the larger society. According to this rule, to succeed as a human being, you need to follow the cues of your marriage, schools, religious organizations, jobs and careers, and laws of the land. The containers of your life will keep you, as a person, happy, successful, and secure—according to the outside-in rule. The forces that surround you are more stable, permanent, and reliant than you are. Follow the dictates of the fathers and mothers of your local community. To be a winner you are supposed to live up to the *expectations of the roles of your life*, and your inner self will then find its own fulfillment.

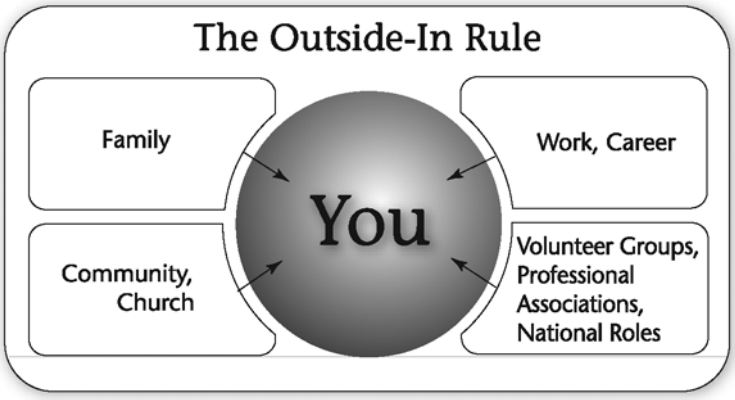

Figure 3. The Outside-In Rule

The Learning Rule

Learning is the central business of children and young people, to *launch* them into adult careers, family life, and leadership roles. Once launched into the adult years, adults shifted from "learning" to "work" as their main activity. Throughout the rest of their years, training outside of work roles played a minor role. There was no basis for thinking there were skills and human competencies to be learned and developed throughout the lifecycle. Learning was a central function of young people, not adults—to prepare the way for success and progress. Each of us would get molded during our younger years and then hopefully function like personal dynamos the rest of our lives.

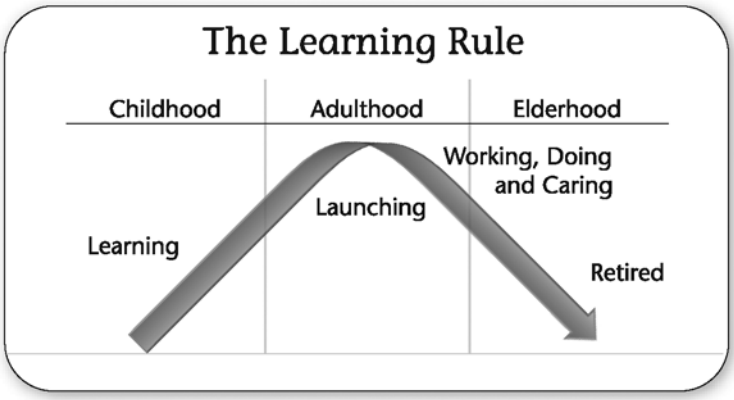

Figure 4. The Learning Rule

When people or a society hold on to beliefs and rules that are dysfunctional in their daily experience, they become angry, scared, and disempowered.

OUR CULTURAL CRISIS AND WHAT WE CAN DO ABOUT IT

Ever so gradually but definitely throughout the past forty years or so, these old rules—which thrived and worked well since the founding days of the United States—led us to a sense of decline and discouragement. The old rules require a culture high in continuity, control, and agreed-upon authority. As those features eroded during the past few decades, we began to feel that something was wrong with us. The more we strived to live by the old rules, the more we felt frustrated and helpless. In and of themselves, these rules are not wrong; they functioned well in a world of predominant order. But they don't provide functional and useful guidelines for our lives in a world of permanent whitewater.

When people or a society hold on to beliefs and rules that are dysfunctional in their daily experience, they become angry, scared, and disempowered. Their optimism, hope, and expectations for the world around them shrink until they are replaced by a pervasive pessimism. The world around them—including their own governments and corporate powers—seems less friendly and less promising. This is basically what Americans have experienced during the past twenty to thirty years. Although we are, without question, the only superpower in the world, with many industrial, technical, and cultural superlatives, we are more tentative than ever about our manifest destiny, and less sure than ever before of ourselves and families.

The way ahead is to change our expectations, our perceptions, our vision of how life works—and to come up with rules that empower our lives and institutions in the context of the rapid change that defines our time. Most of all we need to believe in ourselves again—both as individuals and as a people or culture. If we replace the four old rules with new rules that are both fair and empowering for our lives in our kind of world, we can restore confidence, quality living, productivity, and leadership.

The field of coaching, which was born during this transition from old to new rules, is dedicated to "restore confidence, social vision, and leadership" through mentoring relationships that grow self-directed, responsible persons in a change-dominated world.

Our cultural crisis is about the inadequacy of the "mental maps" we used to follow, one and all—the prevailing beliefs of cultural evolution and progress, the expectation of "more" and "better;" the illusion of "control," the belief that hard work and honesty automatically lead to happiness and success. Increasingly, Americans are realizing that for nearly half a century we've been applying outdated notions of human effectiveness to a world undergoing continuous change.

Overall our society today is healthier than it is sick, and the quality of our lives is among the highest in the world, but we the people are no longer clear about how to find or sustain personal and social fulfillment within the world as we find it. There are new rules to learn for empowering our lives, latent in the very words we fear are our undoing: global chaos, discontinuity, and transitions. Our biggest challenge is to construct our lives and social institutions around the advantages and opportunities of the change process itself, starting with the microsystems of our lives: our lifestyles, work styles, family life, and community relationships.

THE FOUR NEW RULES THAT WILL EMPOWER PERSONS AND ORGANIZATIONS IN THE TWENTY-FIRST CENTURY

The Cyclical Rule

Our lives today are measured by cycles and chapters, not by linear accomplishments. Think of your life as a story, with many chapters. Each chapter itself has a beginning and an end, and a transition to the next chapter. That is the basic model for understanding life in today's world. We measure our lives in small units of "script" that dramatically describe who we are and what we are doing, for a period (a life chapter) of our lives. When that script becomes too rusty or wobbly to function well, we ride the

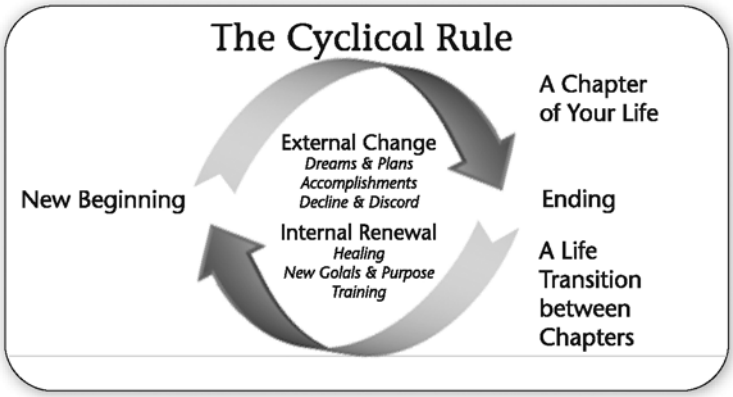

Figure 5. The Cyclical Rule

waves of change—called a "transition," and either modify our story or come up with a new one. In technical language, a life chapter represents many dimensions of "attachment" that we weave together, and a life transition represents many dimensions of "loss" that we let go of, and begin the process over.

Maintaining our lives throughout cycles requires high levels of personal confidence, self-responsible behavior, and trust in forces beyond our control. To learn the art of self-renewal, we need skills to:

- Design the chapters of our lives;
- Entrepreneur and manage each chapter of our lives;
- Embrace necessary transitions between the chapters of our lives where we can invent the main themes and dimensions of our next chapters;
- Make self-renewal and learning the central features of our lifestyle and work style as we renew ourselves, over and over, throughout the years.

The renewal cycle has beginnings and endings. It typically begins with a strong inclination to make something important happen and ends when that effort no longer works or seems important. Beginnings are romantic times, fostering passionate commitments. Endings require us to let go of some dream or effort that has gone stale or awry, and either to fix it or find a different one. That's the cycle of renewal. Here's the learning:

- Learn how to cooperate with change in the here-and-now, and to use change as an opportunity for growth and discovery in every chapter of our lives.
- Learn how to begin each chapter of our lives with feisty romantic determination to make it succeed.
- When our chapters are limp and exhausted, and the end is just a matter of time, learn how to design new directions into the future.
- Learn how to end each chapter with style and poise. Learn to "let go" of what we can't "hold on" to, in all the parts of our lives.
- Learn how our relationships, careers, work organizations, communities, and social institutions go through this same cycle of change, at varying paces.

The Continuous Change Rule

In the twenty-first century, there will be no steady-state resting places, only continuous change throughout all the years of our lives. The renewal process never ends. People who perceive their lives as a renewal cycle know that there is no arrival at a steady-state, no lasting plateau of crystallized happiness. Process, not progress, becomes the familiar reality. Conducting the journey is more important than certain destinations, since all arrivals are temporary. As you get older you keep revising and renewing the same issues, the same urges, and the same concerns that you

Beginnings are romantic times, fostering passionate commitments. Endings require us to let go of some dream or effort that has gone stale or awry, and either to fix it or find a different one. That's the cycle of renewal.

have always had—only in ever changing settings and circumstances. The renewal cycle is active and ongoing, not passive and steady-state. Self-renewing people do not clutch onto the past; they transform future expectations into today's life efforts. *Coaches teach their clients how to practice the art of self-renewal. Chart your way, guide your life, anticipate tomorrow, experience some victories, evaluate as you proceed, experience losses, change course as necessary, and assume responsibility for your journey.*

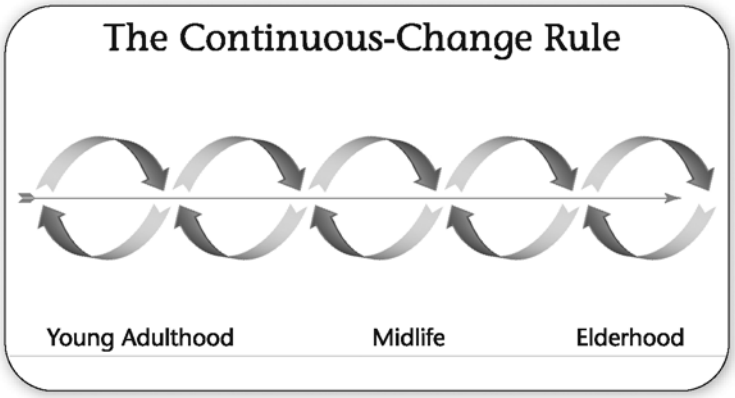

Figure 6. The Continuous-Change Rule

In our kind of world, competent persons need to know how to renew themselves, over and over—to knit life together whenever possible, and to unravel it when necessary. If we do that we will perceive change as a challenge—an opportunity to learn, discover, and grow. *Teaching this is a cornerstone to the coaching profession.*

The Inside-Out Rule

To stay "on course," we need to be value-driven and purposive. Otherwise, the winds of change will blow us in a different direction with each breeze. To succeed as human beings in the twenty-first century, we need to be on-purpose persons, shaping our actions in the world with our inner beliefs. Our many roles as an adult—at work, home, play, community and the rest—are meant to be extensions of our inner selves—our core values. If we stay anchored to our abiding beliefs and pursue goals we believe in, we stay "on course" with our lives. We evolve, develop, mature.

In the twenty-first century, successful people will arrange their lives from the "inside-out," from their values and beliefs to their broader commitments and roles. They will find outer resources to support their fiery purpose. They will stay responsible for their own destinies, and link up boldly to others in ventures they truly believe in. This kind of personal-social congruence is an important goal for coaches. Figure 7 illustrates The Inside-Out Rule.

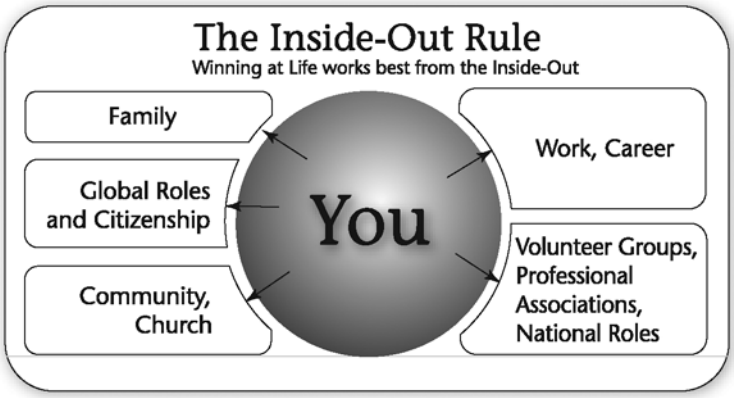

Figure 7. The Inside-Out Rule

The Learning is for Everyone Rule

Learning is our primary activity, no matter how young or old we may be. Twenty-first century adults will require continuous learning and training. Learning is positive change; it is the creation of a change-force within yourself to produce increased awakeness and self-motivation. Learning is the essence of self-renewal or resilience, and therefore is a basic feature of coaching.

The adult learning agenda in our time has at least four different tasks:

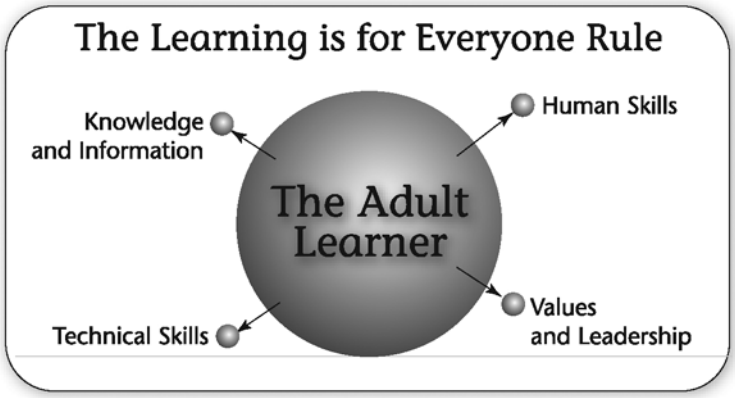

Figure 8. The Learning is for Everyone Rule

Knowledge and information areas. This requires staying abreast of the knowledge explosion, and particularly the information relating to effective living and working in our global village. Our knowledge from our younger years is outmoded and replaced several times throughout our lifetimes. To be awake and effective we need to keep learning in all areas of our lives.

Human skills. These are abilities and tools for being effective in the settings and roles you are in: speaking, writing, listening, persuading, caring, and managing conflict. These are basic human skills for being effective as a person in all our roles.

Professional skills. Each of us has a responsibility to sustain expertise within some specialty area, usually related to our career tasks and commitments. We live in a technological age which is changing at a rapid pace. Only those disciplined to build ongoing learning into their schedules will sustain their expertise and effective leadership.

Values and leadership. Adults typically become more vocal about values as they mature. Adults perform most of the leadership roles in our society, and they are the bearers of culture from one era to another. Particularly in the post-parental years, adults emerge as the critical leaders throughout society, from executive roles to voluntary causes to mentoring relationships.

Today's world is universally described as "continuous change," "permanent white water." The goal of adult learning is to stay awake, alert, and alive—ready for the living of our days. The goal is to become as conscious as possible about what is taking place in our human experience. The goal is to sustain a livable balance among the four dimensions of the adult learning agenda: new knowledge and information, human skill development, professional skills, and values and leadership.

COACHING WAS BORN IN OUR CHANGE-DOMINATED WORLD

Very few professions have been born in a change-dominated world. Most professionals (teachers, physicians, lawyers, psychologists, and others) function with a set of core skills and concepts that they keep repeating throughout their linear careers. The coaching field emerged as a field to facilitate change and development as its central functions.

During the past twenty years, I have watched efforts at short-term interventions in organizations prove themselves of little worth as entrenched corporate cultures struggled with unyielding forces of global change. American work organizations have felt forced to retrench, flatten, and measure their success by short-term plans around bottom-line issues. That trend away from the long-term, human dimensions of work toward immediate financial issues has altered most work organizations in America. A great many people are working harder than ever, and enjoying it less.

In the wake of this, I have become increasingly interested in mentoring/coaching as a longitudinal resource readily available in most work organizations and communities for promoting deep renewal and learning throughout organizational systems. The most profound way to learn skills, culture, and values is directly from other human beings who already possess those qualities.

A "mentor/coach" is a trusted role model, advisor, wise person, friend, *mensch*, steward, or guide. A coach works with emerging human and organizational forces to tap new energy and purpose,

During the past twenty years, I have watched efforts at short-term interventions in organizations prove themselves of little worth as entrenched corporate cultures struggled with unyielding forces of global change.

to shape new visions and plans, and to generate desired results. A mentor/coach is someone trained and devoted to guiding others into increased competence, commitment, and confidence. Coaches play many roles to achieve future-oriented results—career pathing, personal and professional renewal, training high performance teams, and providing informal leadership for transition management.

Mentoring/coaching is devoted to evoking and sustaining resilient persons and human systems. Anchored in the human reservoirs of mature people, mentoring strengths are deep, natural qualities within the mentor/coach. Mentors function not merely with "skills," but with personal "mastery" stemming from their own self-esteem, integrity and experience. Coaches model ways to thrive in whatever environment they are in. They connect present realities to future opportunities. More specifically, a mentor:

- Models mastery in professional areas that others want to obtain;
- Guides others to high performance in emerging scenarios;
- Advocates, criticizes, and extends corporate culture and wisdom;
- Endorses and sponsors others without having power or control over them;
- Facilitates professional development and organizational system development.

For the past ten to fifteen years there has been considerable interest in "mentors" or "coaches"—among human resource directors, organization development consultants, and throughout corporate America. I believe that most coaching efforts that have been tried have lacked a conceptual framework for designing and guiding mentor/mentee training systems. Mentor/coaching programs are often reactions to organizational problems rather than proactive designs informed by knowledge of the art of mentoring and coaching. *Coaching is conceptually derived from the knowledge of developmental psychology, adult learning theories, and human systems theories, applied to the practical issues facing persons within organizations throughout our culture.*

SEVEN REASONS WE NEED PROFESSIONAL COACHES

There are at least seven reasons why coaching is so important at this time, not only in corporate America but throughout the society.

To help adults manage change effectively

We all know that change has become the most dependable reality in our lives, and that people and organizations throughout the globe live with continuous uncertainty, tentativeness, and worry. Most live without long-term expectations and plans; they live intense daily and weekly schedules.

The most probable scenario for the future is that the intensity of change will increase steadily in both pace and in the dimensions of our lives. Although we are not the first human beings to face the dilemmas and opportunities of constant change, the technical and universal aspects of our global situation are unique, altering human consciousness and priorities everywhere. Change diminishes our sense that we can depend upon the world. Whenever change predominates over stability throughout a culture, many become angry that they have been abandoned by their society or by their work organizations. Others drop out because they see no future with a promise for them. Still others are paralyzed by fear or cynicism. Complex change often affects workers abilities to sustain motivation and to commit to long-term projects.

The technical and universal aspects of our global situation are unique, altering human consciousness and priorities everywhere. Change diminishes our sense that we can depend upon the world.

In the new environment of perpetual change, workers who cannot manage the discontinuities of their own lives and work will not produce great results, no matter how great their technical skills or leadership abilities. But mentor/coaches—people who are anchored within themselves to do and accomplish what they love—search for the advantages of change, not only in work settings, but wherever they can be found. Coaches are positive change agents. They motivate people around them with new hope, purpose, and concrete steps for sustaining a cautious optimism. That is a fundamental task of mentor/coaches.

The more the world around us is in flux, the more we as individuals must be certain about what matters in our lives: how we spend our time, who we are connected to, and where we are going. When the macrosystems of our lives are in considerable flux, as they are today, the microsystems rise in importance to anchor our lives. A mentor/coach is someone who can evoke passion and purpose in others, within the dissolving and reconstituting environments of our time.

The highest calling of coach/mentors today is to become guides to a transient culture—including a transient corporate culture: to grow strong persons, committed work teams, dynamic work systems, and sustainable communities that function from the grass roots up. Effective mentors model the future because they are willing to invent it, design it, and insist on it. As for change, they see change as an asset for getting the job done, not a cramp in the tummy.

To model mastery

Much is being written about the fragmentation of our culture today, with many self-interest groups and culture-wide anger, violence, and cynicism. Mentor/coaches are not a social solution to this, but they represent one mature resource that can make a difference. Coaches work in small but deep ways to anchor people and human systems in a public philosophy of trust, vision,

strategic thinking, conflict management, and collaboration. Effective coaches inspire coachees with a sense of self-reliance and deep-seated determination much needed in these uncommon times.

People need to learn how to grow themselves in our kind of world—turbulent, fast-moving, unpredictable—and that requires personal maturation and mastery. Coaches facilitate the development of radar and gyroscopes in people and in human systems, so coachees can master their own lives, careers, and the flow beyond.

- Radar is the ability to decipher your best choices within the rapidly changing environment you move through, day by day, month by month. Coaches facilitate pathways for journeying ahead even when destinations are not clear.
- A gyroscope is a perpetual balancing mechanism moving through environments of constant change and unanticipated interaction; gyroscopic ability is a central capacity coaches develop in their clients—redefining identity, ego strength, and personal commitment. Mentor/coaches enable clients—individual and organizational—to anchor themselves to their own values, confidence, compelling visions, and emerging plans.

If individual adults can develop dependable *radar* systems for guiding themselves in and out of the never-ending maze of daily life, they can sustain confidence, self-esteem, and hope. If individual adults can develop dependable *gyroscopes* for guiding themselves through the indefiniteness of their social experience, creating sufficient inner stability and outer constancy for living their beliefs, they will have surplus energy and courage for designing work and communities in our kind of world.

To elicit core values and commitments

There is a great tendency today to think that technical prowess is the pioneering edge of our post-modern society. Truth is, as important as technological knowledge and skills are, they pale when compared to our need to be value-driven, bonded to others, and clear about the ultimate purposes of our lives. Technology fosters communication tools and mediums. But the medium is not the message. The message most people search for is about "meaning," the ultimate concerns of our lives—in short: "values" and "beliefs."

Technological advancements are the province of young people whose mathematical and specialized skills are often superior to those of older folk. Values and purpose, on the other hand, are the province of mature people who have been around long enough to transcend their intellectual skills and immediate personal needs and acquired trust in the flow of things. Such persons are effective generalists reaching out to a younger society

of specialists. Adults in midlife and beyond are the most likely bearers of values for a culture. For that reason, many coaches—but by no means all—are persons in the second half of life.

To renew human systems

In the past twenty years, corporate America has sought to transform its management styles, and one of the groups targeted for removal has been "middle managers." Typically, a middle manager is a well-paid, long-term, loyal worker responsible for getting work done in some part of a business. The new management style is to train workers to manage themselves, through teams, leadership training, and new rewards. This transformation has brought some astonishing improvements in the development of quality goods and services in an increasingly competitive world.

However, the middle managers were often the invisible "mentors" of these organizations, and without them there is in many organizations a hollow absence of older role models to foster advanced skills, management abilities, new career directions, and long-term loyalty with younger workers.

Coach/mentors can be found and trained in most every workforce. Since they are already being paid, it is primarily a matter of time allocation to establish them as available coaches to promising, less experienced workers seeking to grow within a work system.

To sponsor future generations

There is a link in the generational chain that is weak and unsure. It is the post-boomer groups of Americans, who at ages ranging from thirty-five to sixteen come by a great variety of names: Busters, Millenials, and GenXers. This cohort is known for its skepticism, minimalism, individualism, and social silence.

This generation challenges the assumptions of the importance of work and success. They doubt that they will have much of a future no matter what they choose to do. Of course, not everyone in this age group thinks this way, but a large number do, and it challenges the rest of us to learn how to communicate and cooperate with those who are cynical and not easily motivated by money, advancement, or recognition.

Adult coaches may be more effective than corporate/government leaders for facilitating the paths of this generation within adult roles. Coaches look for inner values as the primary source of motivation. In quiet ways, coach/mentors seek to provide cultural continuity as their fundamental legacy to the future. Coaches are committed to reaching out, bridging gaps, and finding new ways to build upon what has come before. They stand and deliver. They advocate inclusion of all persons, cohorts, and identities.

To model collaboration and consensus building

Another way many of us experience fragmentation today is in terms of the endless list of network niche groups, each of which has some legitimate way in which to define its identity. Many form around a single moral concern; others around gender issues, illnesses, product lines, religious issues, racial or ethnic identification, or sports activities. While these groups perform many positive functions through their special interests, they tend to pull their members away from forum discussions of the corporate and cultural issues that affect us all.

Where do people learn and practice "democracy" in a society of cul de sacs? The grand American rhythm of conflict and consensus has devolved into a greater amount of conflict and less and less consensus. Whose responsibility is it to teach collaboration and consensus-building? It used to get learned in schools, churches, town meetings, voluntary associations, even corporations. Broad debates about human concerns are certainly thriving in these settings, but in our technocratic-media world, these institutions have much less impact on public concerns and opinions. Grass roots forums have been upstaged by TV and radio talk shows that focus more on alarming news and celebrity events.

Coaches can't solve this problem, but they will exert an influence toward the human connections, alliances, and open systems. They plant the seeds of democratic process:

- Themes that coach/mentors return to, time after time with their clients are "priorities," "connectedness," "balance," "fairness," "passion, "purpose," "vision," and "planning." They set an example that living with "we" is a necessary part of living with "me." They promote a future for the "whole" as well as the parts.
- Coaches train clients to honor their core values, to articulate preferences, to negotiate differences, to compromise, and to manage conflict when necessary. These basic human abilities promote self-responsible behavior within interdependent contexts.
- Mentors encourage debate about the wise decisions for challenging scenarios. Coaches are concerned about making future a developmental continuum with the past, and they promote those qualities in the persons and systems they touch.
- Mentor/coaches "coach" the organizations and environments they are in as well as key individuals. They advocate a process of decision-making in which everyone affected by a decision has some way to influence the shaping of that decision. Coaches emphasize both personal empowerment and social consensus, fostering an essential mind-set for personal, career, and organizational leadership.

To tap the genius of older workers

We live at a time of wasted human assets. Americans have been deluded by the myth of youthism—that we decline in all respects as we get older, particularly after the age of forty or so. Developmentally this myth is simply not true, but operationally the myth contributes greatly to the waste of corporate human resources. Corporations typically begin to divest themselves from the human potential of their older workers long before they retire. The graying of America will reach its zenith in the years immediately ahead of us, and with it will come a redefinition of "old" that will emphasize a diversity of contributions from older workers. The smart work system will begin, in the early years of the twenty-first century, to redefine its policies and attitudes toward its older workers.

Another American myth is that of retirement. Retirement evolved as a concept in the twentieth century to force older people out of full-time work. It was the doing of corporate and labor leaders, in collusion with the federal government. It has nothing to do with optimal human development or the best use of elders as a social resource. As generation after generation of adults extend life-expectancy to higher ranges—into the eighties, nineties, and even beyond—some kind of positive engagement and recognition of elders is called for.

Many, if not most, older workers want to leave a legacy, make a difference, and exert influence on the priorities of the environment around them. In future generations, older workers will launch new careers, assume temporary leadership assignments, engage in volunteer service, and serve as consultants and mentors.

Mentor/coaches can foster new employment challenges for older workers, within corporate environments and outside of them. Mentor/coaches can promote new challenges for older workers to find new meaning and purpose in their work. Many of these coaches will come from the elder ranks themselves: Their voices will come from deep reservoirs; their actions will spring from gratitude; their joy will rise from spirit. Older workers, if prized by their companies, can help immensely to provide stability and pride in the work culture.

Coaching will not cure the perennial ills of corporate life or the American culture. Mentors simply enrich their environments with sharing, caring, and daring. Like yeast they leaven the corporate and community loaves. Coaches roll up their sleeves to make things happen. They have that old American spirit that if we work hard and work together, we'll all benefit. If you have abilities others covet and the heart to share, make yourself available and see what happens! Coach/mentors are an enormous resource whose time has come.

Coaching will not cure the perennial ills of corporate life or the American culture. Like yeast [coaches] leaven the corporate and community loaves. Coaches roll up their sleeves to make things happen.

ABOUT THE AUTHOR

Frederic Hudson, Ph.D.

Frederic Hudson, a Rockefeller and Danforth Fellow, earned his doctorate at Columbia University in New York, and taught at Colby College, Stephens College, and the University of San Francisco. He is respected as a recognized expert in adult change. As the founding president in 1973 of The Fielding Institute – the most innovative doctoral studies graduate school in America – he is widely respected for his contributions to adult training in management, organizational developmental and education.

Hudson left Fielding in 1986 to establish The Hudson Institute of Santa Barbara, a learning organization focused on the intersection of change and development in the lives of leaders today. "The existing graduate schools of today are simply unable to devote themselves to what is most needed as the world deregulates itself in the swirl of endless change: persons capable of entrepreneuring the future at every level of change –personal, career, work organizations, communities and beyond."

THE CALL OF COACHING

At some point between 1950 and 2000, our culture and the entire world moved from a stable-state, linear consciousness to change-oriented, cyclical ways of thinking. The overwhelming need of all cultures at this time in history is to train people to understand change, to manage change, and to guide their lives and human systems, not so much by rules of the past as by purpose, visioning, and planning that will link us to viable futures. For the most part, existing professions and their guilds are embedded in the earlier paradigm of stability and linear thinking.

Clinical psychologists were dominated by diagnosing, treating, and repairing. Moreover, their professional organizations and funding and reimbursement resources keep their performance boundaries narrowly focused upon treatment, problem-solving, and rehabilitation. By the late 1980s, many forward-looking people were asking: "To whom do people turn to for assistance when they are disoriented but not sick, empty but not depressed, bewildered but not helpless?" One response that came in the 1990s was "personal and professional coaches."

The function of career professionals in 1960, when that field was emerging, focused upon matching personalities of young adults with linear career paths for lifetime employment. Today there are few linear careers and lifetime employment is extinct. The typical college graduate is now expected to have six to eight "career" identities during his lifetime? How do people learn to move in and out of work settings with some degree of confidence and inner leadership? One answer is from career coaches. Career professionals are increasingly using coaching strategies to train clients to connect their inner skills to outer work.

In the 60s and 70s, government and large organization planning was conducted from tthe top-down. That doesn't work in environment of constant change. In today's environment planning is done with everyone involved, using "open-space," "future vision," or other approaches that require employees as well as structural systems to change. Coaches are often employed with consultants to facilitate these processes.

During the 70s and 80s when corporate structures were evolving away from hierarchical control of employees and toward trust and collaboration with workers, widespread training was needed to help every worker think and behave like a leader.

- The emphasis was on business performance, as in TQM and ISO and JIT, steps in the right direction.
- Then came seminars on teamwork and empowerment, which made the focus more personal, but still contained by immediate corporate issues.
- Consultants also added to the flow toward coaching, through their work with key corporate figures and system interventions.

ABOUT THE AUTHOR (CONT)

Hudson wrote *The Adult Years–Mastering the Art of Self-Renewal* (1992, revised 1999) Jossey Bass Publishers. In 1995, he co-authored *The Joy of Old–A Guide to Successful Elderhood*; and in 1996 he and his partner and colleague, Pamela McLean, Ph.D., wrote *LifeLaunch–A Passionate Guide to the Rest of Your Life*, a book used as a text in college and university courses of adult life/career planning. His foundational book, *The Handbook of Coaching* (1999) Jossey Bass Publishers, identifies the critical knowledge areas, skills, and techniques required in professional coaching, and summarizes the major coaching theories from experts in the field.

But these approaches to change had one common flaw: they came and went like waves hitting the beach. They didn't last. Then it occurred to a great many that if organizations are going to make lasting changes, the individuals working in them must change first. Stephen Covey was a major figure in the shift from corporate talk to training highly effective persons. In the late 80s, corporate coaching came on to the scene, to work over time with both individuals and systems. They function like leaven in bread, to get the job done in a lasting way.

Some of the new emphases that coaches have added are visionary leadership training, executive coaching, renewal coaching, and transition management. Indeed, the field of leadership, and particularly entrepreneurial leadership, has influenced and shaped the new profession of coaching as much as any other influence. With the demise of middle managers in the 70s and 80s, a need for a self-motivated, challenging, and imaginative workforce emerged, giving birth to widespread coaching training within organizational settings. This trend was accelerating by the need for human caring and daring during the corporate convulsions of downsizing, mergers, acquisitions, and outplacement.

Sometime in the late 1980s, the professional field of coaching was born, promoting continuous resilience and performance in persons and organizations. A major need was to help facilitate future scenarios of individuals as well as corporate entities, given the complexities and speed of change in today's world. The requests of coaches were often about personal evolving, succession planning, career shifting, work performance, high performance teams, outplacement, burnout, scenario building, leadership training, work/home balance, and individual/organizational renewal.

Sometime in the late 1980s, the professional field of coaching was born, promoting continuous resilience and performance in persons and organizations.

For the past ten years there has been considerable interest in "mentors" or "coaches" throughout North America. As corporate structures evolved from top-down, control functions to bottom-up stakeholder-empowerment models, widespread training was needed to help every worker become a leader. Out of that festering, the field of professional coaching—serving persons and organizations—was born.

In the broader culture, a similar shift was taking place, from business as usual to a sense of crisis. Predictability and stability were giving way to technological change, political upheavals, community crises, monetary earthquakes, medical care, and global conflicts. The world that used to feel linear now felt more like a roller coaster.

People scrambled to find a professional resource to help them recover passion and purpose. One resource that appeared was "personal and organizational coaches," working directly with

individuals and organizations to find inner anchors for outer challenges.

- Coaches look for shifting advantages within the change process itself.
- Coaches are catalysts for facilitating self-responsible behaviors in their clients.
- Coaches improve imagining, performance, teamwork, and risk-taking.
- Most importantly, coaches work through transition experiences, which evoke resilience, elan, staying power, renewal, and hope.

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A Developmental Perspective in Coaching

PAM McLEAN

The Hudson Institute of Santa Barbara is among a small cadre of coach training and learning organizations in North America emerging in the late 80's and early 90's, each with roots in specific fields of study and applied theoretical orientations. Like others, the Hudson Institute began building its coach training and education programs when the term 'coaching' was largely understood in the sports arena and the nascent field of coaching was frontier territory at the cross-section of leadership and organizational development, human development, behavioral change, consulting psychology and various philosophical domains. As the profession matures, the author and other members of the Hudson Institute are able to appreciate the diversity and richness of multidimensional roots and the value of a broad pool of theoretical orientations informing this burgeoning field of coaching. This introductory article reflects that diversity and richness.

Coaching has emerged at a unique time in history; few new professions have been born into such a change-dominated world. In the past, professionals have always functioned with a set of basic skills and concepts that they use repeatedly throughout their careers (medicine, law, finance). Coaching is radically different in that it has emerged as a field that, as its central function, facilitates change and development. For this reason alone it's imperative that our profession has a coherent and explicit understanding of how change happens and how we support and leverage continuous change at the intersection of development.

At the Hudson Institute, our primary theoretical roots are in adult development, human systems thinking and change theory. Development is an ongoing process for the individual that is inextricably embedded in all levels of human systems, ranging from the internal system of self to the broader systems of teams, organizations, and extending beyond into cultures and today's global forces. Development throughout our adult years as leaders, managers and individuals is at the heart of growth and change in all facets of our humanness and at all levels of human systems.

Our foundation in this broad domain began well before the field of coaching emerged. Co-founder Frederic Hudson served as the founding president of The Fielding Graduate University in the 70's and 80's, a learning organization whose mission was in providing graduate degrees to midlife adults through an

innovative, self-directed learning model that embraced the intersection of change and development in the learning paradigm.

Many of these concepts and perspectives continue to be evidenced in our work at the Hudson Institute today. At Fielding, Hudson gathered together a group of senior mentors, guides and colleagues dedicated to the understanding of change management, human development and adult development and learning in order to successfully pioneer an innovative approach to adult learning. The list included Malcolm Knowles, father of adult learning; Robert Tannenbaum, UCLA professor, organizational guru, author of several books on change inside organizations; Edgar Schien and his well known process consultation model; Richard Beckhard, OD guru and author; Marjorie Lowenthal Fiske, well known developmentalist and researcher on intentionality; Fred Jacobs, founder of Leslie College and innovator in adult learning; Robert Goulding, MD, founder of Redecision psychotherapy; Art Chickering, PhD, professor and author who taught us that learning changes as we develop; social scientist, Nevitt Sanford, and so many more influencers – Vivian McCoy, Carol Gilligan, Daniel Levinson, along with the earlier work of many theorists and researchers including Robert Kegan, Jean Piaget, and Abraham Maslow.

At Fielding, Hudson gathered together a group of senior mentors, guides and colleagues dedicated to the understanding of change management, human development and adult development and learning.

Development throughout the course of our lives as individuals, systems, and organizations has been researched and understood through the many lenses of this stellar list and far more. From the seminal concept of individuation articulated from the perspectives of Neitzsche, Freud, Jung and more, to Erikson's and Levinson's age and stage theories, to Piaget's and Kegan's conception of levels of development, Corey's work on team and group development, and Flamholtz's work on the developmental trajectory of an organization – all of these works provide us with an important window into the developmental process of the human journey in the context of our many human systems.

Maslow developed the hierarchy of needs to accentuate the developmental nature of our wish to strive for more. Erikson taught us about the layers of identity we develop over the life course. Kegan drew our attention to understanding the implications of stages of adult development relative to individuation, while Gilligan focused attention on the gender differences in our developmental journey. Psychology teaches us a healthy respect for the power of the past when we are working to make changes, and the subfield of positive psychology illuminates areas of particular relevance to coaching in the leadership domains—including emotional intelligence, optimism, and engagement factors. Systems theory illuminates for us the power of homeostasis in a system of any size and the challenge we have as coaches to fully appreciate and work to uncover the natural underlying resistance to change. Charles Handy teaches us about the paradox involved

in any change and the force at which change is hurling itself onto us as a culture today.

Learning theory includes the contributions of David Kolb, Chris Argyris, Malcolm Knowles and others, and this arena teaches us how learning – ranging from deep transformative learning to the smaller behavioral shifts – occurs and articulates the necessary ingredients that must be in place for learning to be optimal. As coaches, we know that learning is one of the most vital elements in developing, growing and changing during our adult years. Finally, philosophy always continues to be a source of wisdom, and contemporary postmodern work of Fernando Flores, Ken Wilbur and others builds on these philosophical roots while seeking to articulate an overarching theory of development that transcends all pre-existing conceptualizations combining the best of Eastern and Western thinking.

At the Hudson Institute we have continued to study developmental patterns in our adult journey and we've come to believe it's time for a fundamental change of consciousness, from linear to cyclical notions of how life works at all levels of human systems. For decades, the field of adult development focused almost solely on a linear, age and stage approach to understanding our adult journey; yet in today's fast paced world, filled with fewer rules and social predictability, it's not as relevant to map our development as individuals, leaders and organizations to ages, predictable stages, and the social constraints and social forces of the past.

At one time in history the sigmoid curve seemed to do a pretty good job of summing up the story of life as individuals and as businesses – we begin the journey slowly, experimenting, vacillating and wavering along the way; we wax and then we slow down and inevitably decline and diminish. Today it's not quite that simple, and whether we turn to the well-known developmental and longitudinal work of Erik Erikson or the organizational life cycle articulated by Eric Flamholtz, this thoroughly predictable linear pattern we could 'count on' in the late-industrial age, is not as workable a blueprint for our development anymore. Life is literally changing too rapidly to hold on to a predictable map with a one way direction. As Hudson (1999a, p. 31) observes, "Ever since the industrial revolution, linear thinking has dominated our consciousness with its basic notions of progress, perfectionism, success, happiness, and planned change. A linear perspective portrays life as a series of advances from simple to complex, from lower to higher, and from good to better."

Today, change happens at lightning speed within the individual system and the largest of organizations; our challenge is not just managing and surviving change, it's learning to live with it,

leverage it, and feel fully engaged and alive. As we orient our lives to this time in history, we need to shift away from a linear paradigm toward a cyclical one and shift our thinking from progress to process.

Today, change happens at lightning speed within the individual system and the largest of organizations; our challenge is not just managing and surviving change, it's learning to live with it, leverage it, and feel fully engaged and alive.

At the Hudson Institute we advocate a holistic model of development and change – one that encompasses and accounts for the context in which we live while simultaneously acknowledging our individual journey in life. Whether we are coaching a leader at the peak of her career or an early career person looking to define her own path, or a successful mid-career leader who is burned out and bored with the current scenario at hand, it's essential that we, as coaches, understand the developmental terrain in all contexts.

Several important characteristics are inherent in a holistic and cyclical view of adult life. First, the cyclical view portrays life as a complex, pluralistic, multivariate flow, with ongoing cycles in nature, societies, and people. Familial systems, companies and nations are all part of a larger, often chaotic flow that can be influenced and shaped but not completely controlled. Second, the cyclical paradigm assumes life 'develops' through cycles of change and continuity rather than in progressive, linear, straight lines. It concentrates on understanding both what persists throughout our lives and what necessarily changes. Each time we relinquish an old stage of life, we differentiate one more time, and a new level of development and individuation emerges for us. Third, the cyclical picture honors the polarities in life and in our organizations – the up times and difficult times are incorporated into our understanding of the very undulating rhythm of opportunities and obstacles. Fourth, continuous learning is essential to the constant retooling of our multilayered human systems.

We have been informed by this view of adult life during our many years of practice, writing, model building and research. This broad developmental perspective and approach has guided our work and understanding of the coaching paradigm and the change process. Over time we developed a model for understanding and normalizing the ongoing cycle of change that occurs at an increasingly rapid pace in our lives today. This model provides us with a normative and development framework for conceptualizing where an individual or system might be at any point in life's journey.

THE CYCLE OF RENEWAL

Change creates the crucible for development, and change can be triggered by internal or external forces and events and circumstances in our lives. It may be a promotion, a firing, a major shift in roles with new demands at hand. It may be a performance review that requires some adjustments, a promotion that requires a move to another continent, a first career position or the final capstone, a death or a challenging illness at home. All

of these changes catch us off guard and the bigger the surprise, the greater the opportunity and invitation for our own development. We've built a model we term "The Cycle of Renewal" (see Figure 1 below) to provide a framework for viewing a cyclical and normative cycle of ongoing change that intersects with the human systems at play at any point in the adult journey. Unlike the older linear models tied to specific ages and stages, we view development throughout the adult years as continuous and growthful. This same cyclical change process occurs in the individual and larger systems – so it's equally applicable to individuals, teams and organizations.

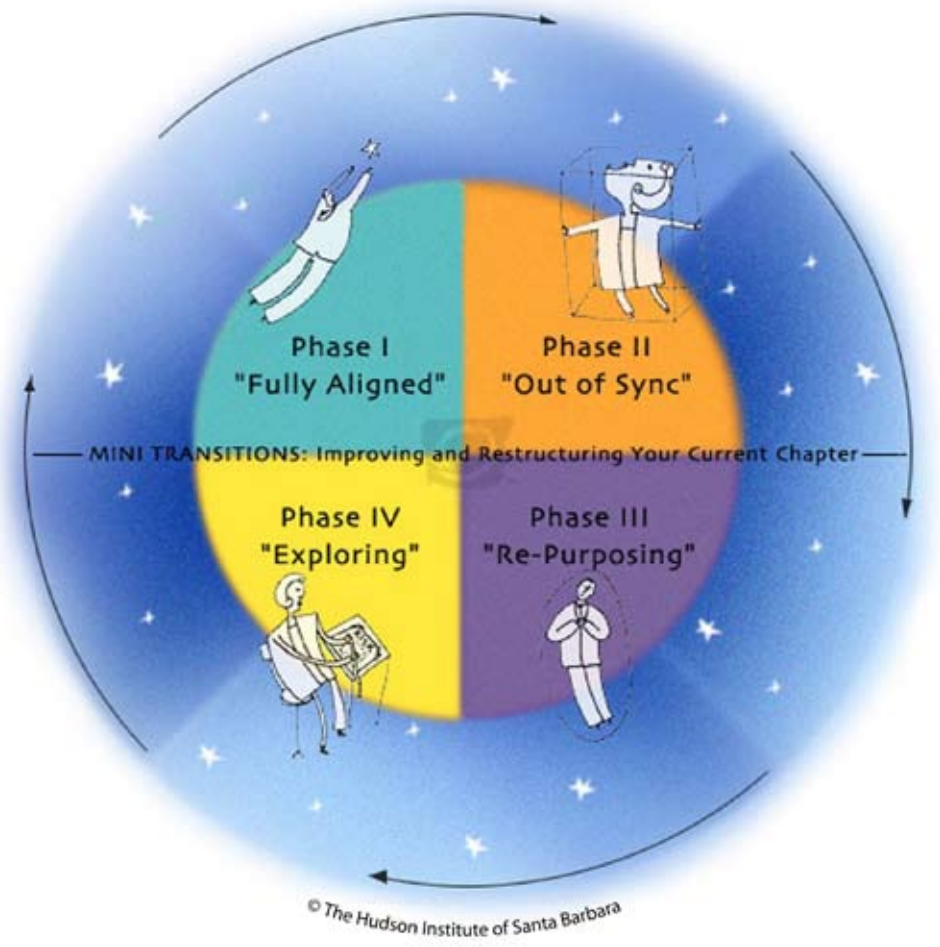

Figure 1. The Cycle of Renewal

A brief walk through the cycle begins in the quadrant labeled "Out of Sync" – familiar territory to all of us. We find ourselves here when we have a vague sense of *ennui* and as we move further down the arc, our sense of discontent grows in intensity. It might be the team that has accomplished a big goal and the carrot is gone, the glory is over; the leader who finds herself promoted

into a position that suits her pocketbook and status but not her heart, skills and dreams; or the 55 year old who thought the job was secure and lived accordingly only to find it all go up in smoke overnight. In all of these situations we feel discouraged. There is a sense of hopelessness – big or small, a feeling of helplessness, and a languishing in that doldrums place with no wind to help move us in one direction or another.

We have only a handful of choices when we find ourselves in this place. Of course, we can dig in our heels, get angry, and refuse to take action. Non-action typically results in more of the same – and eventually even this stance is impossible to maintain. In order to move out of this quadrant we need to make some changes – either small adjustments (a mini-transition) or deeper changes that result in real developmental shifts of the transformative kind. We tend to make the decision about whether to make a small adjustment and keep moving ahead or take the longer road based on how big the change is with which we are faced. Big endings and beginnings offer (and just as often, force) us to make some major changes in our lives or larger systems.

BEYOND THE SUCCESSION PLAN

Let's consider Steve's situation – he had been leading a large health care organization with great success for the past fifteen years. He had planned for his succession, and he and the board were in agreement about the timing and the important next steps. Yet, Steve had made no plans for the shift and instead worked at his usual break-neck speed right up through his final day on the job. A month later when he had assumed he would be enjoying his new sense of freedom, he found himself instead in a very lonely and dark place – no more tight schedule and constant demands, no more global travel, no more admin at his side, no more title and identity; and most of all he was completely surprised by his own sense of loss and unexpected reaction to this new place. The change for Steve was enormous – no amount of small adjustments would bring him back to equilibrium. Steve was faced with peeling away an identity, a mask of sorts, and uncovering a new layer of self and identity – 'repurposing'.

As organizations and individuals we spend very little time in this "Repurposing" quadrant and it's likely as individuals we'll only move into this transformative space a handful of times in our lives. Yet, each time we find ourselves here – whether it's a loss or a new beginning, we inevitably face parts of 'self' that we haven't known much about. For Steve, he had been a very successful leader, but he had paid the price of single-mindedness and now the one string guitar wasn't enough. He had to do the hard work of creating a new layer/dimension of self, and this is not a comfortable place. It requires self reflection of significant dimensions, it requires letting go of old identities, it requires some grieving, and it all takes time – more time that we'd like.

When we've traveled the quadrant of Repurposing we say goodbye to what we no longer need on the journey ahead. For Steve the work seemed enormous – he was genuinely surprised by how much his role as head of an organization defined who he was, what he did, and how others responded to him. Creating a new sense of Steve without his organization took time, space, self reflection, and he found some solace in writing as well. Finally, after nearly a year of sabbatical-like living, Steve was ready to move forward, to venture into new territory and try on some new ways of being. This is the quadrant we term "Getting Ready" – the territory that requires new thinking, experimenting, and exploring new ways of being. At some points in the journey it's likely to include forms of learning – maybe an advanced degree or more training. At other times, as in Steve's case, it's a time to harvest all of life's skills and talents and test new ventures with fewer stakes and plenty of pleasure. We are a 'doer-addicted' culture and it's our tendency to jump on the first experiment we try and often miss out on the value of real experimenting at this juncture.

Steve found himself tempted to try out the first idea that stumbled upon him – a call from a well-respected nonprofit agency in his community. But with the help of his coach, he stepped back and allowed himself to take a broader look at his options before settling on his next steps. Ultimately Steve decided to test out a dream he had many years ago to start a small business enterprise of his own. Once he moved into this new decisional place he was in the first quadrant we term "Go for It" – that place where we feel most alive, most aligned with our sense of what's most important at this time in life. Steve's stay in this place could be a long while, and it will inevitably lead him to that "Out of Sync" place a few times and require some adjustments in order to maximize this chapter. Then at some point it won't be enough anymore or some major external change will rip him out of this chapter and require another longer journey through "Repurposing".

A LEADERSHIP PASSAGE

Jill's story is quite different. It begins when at age 42 she moved into a leadership role following the sudden death of a colleague. She was honored to have the position offered to her and willingly agreed to accept it, but once in the position she was overcome with challenges coming both from her leadership team and from her own personal sense of inadequate capacity to do the job. What's more, she found herself questioning her decision and wisdom of the big leap she had signed on for. Her new role demanded toughness and an in-the-moment decision making style that was well outside her comfort zone. And in the language of the Cycle of Renewal, Jill had been happily engaged in her old role and likely enjoying a long stay in the "Go for It" quadrant until this big change came along, catapulting her into that "Out of Sync" place where things don't feel 'right' and there's a

Jill had been happily engaged in her old role and likely enjoying a long stay in the "Go for It" quadrant until this big change came along, catapulting her into that "Out of Sync" place where things don't feel 'right' and there's a sense of fear about what's to come.

sense of fear about what's to come. Jill could have refused the promotion and dodged these challenges. Instead, she willingly took it on, and her success required some significant shifts in her perception of self and concomitant capacities.

In the end, Jill succeeded, and she would be the first to say she's a far better leader. She has developed new capacities and confidence that simply didn't exist at the same levels before this change transpired. Jill is more alive and engaged than ever – no longer second-guessing decisions, taking remarks too personally, or deliberating on strategies too long. Jill's journey required what we term a "Mini-Transition" – a series of adjustments that enabled her to operate effectively at a new level of leadership in her organization. Her identity hasn't fundamentally changed. She's simply deepened her skills in order to be fully equipped to step into this new role.

Leaders and organizations have only a handful of choices in this new terrain – to react, resist, or leverage the inevitable change as an opportunity for development.

LEVELS OF CHANGE: TRANSFORMATIONAL AND ADAPTIVE

Steve's journey was likely transformational for him – it required letting go of an old identity, coming to terms with a new time in his life and creating a new way of being in the world – all the work of the lower half of the circle on the Cycle of Renewal uncovering a new level of differentiation and a new stage in the adult journey. Jill's journey included a series of smaller changes that didn't require an 'overhaul' of self but instead an increased capacity in her leadership role – the work of the upper half of the circle.

Life today breeds endless change and our ability to map the way, understanding an ongoing and normative change process that is always present in our lives allows us to make far more intentional choices. Simply put, change is a ubiquitous force in today's world. Leaders and organizations have only a handful of choices in this new terrain – to react, resist, or leverage the inevitable change as an opportunity for development – allowing us to reinvent ourselves and our systems as we remain engaged, agile and vibrant.

The central function of coaching is facilitating development in individuals and systems. Leveraging change to foster development is the domain of coaching in today's change-dominated world.

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Pamela McLean is CEO and co-founder of The Hudson Institute of Santa Barbara, bringing 35 years of experience in the fields of clinical and organizational psychology and leadership coaching. Pam has worked with hundreds of organizational leaders and seasoned professionals inside organizations and in solo practice to deepen and strengthen their coaching skills. She also works with organizations in developing coaching cultures and establishing best practices inside organizations.

Gen Y Leaders, Boomer Coach

SANDY SMITH

Sandy Smith explores the impact of generational differences on the coaching process, offering insight into the challenges and developmental opportunities for the coach. In this paper, Smith offers insight into a new style of work environment and how a unique generation of new leaders is challenging executive coaches to re-examine their beliefs, expectations and basic coaching paradigms. Aligning with the developmental focus of this journal issue, Smith concentrates on the development of these leaders within the context of developing companies. Smith identifies the opportunities she has experienced regarding her own development that she believes may have wider applicability for coaches working in this domain.

I am a 50-something executive coach with thirty years experience working with technology companies, fifteen of those years as an executive coach. Today, I work with senior leaders in a variety of organizational contexts and industries. It has been my observation that the maturity of the organization and the experience of the leader impact virtually every aspect of the coaching engagement. Companies with longer histories are more predictable and slower to change.

The more seasoned leader can also be more resistant to change. Many times a mature leader will attribute success to certain behaviors and may be more reluctant to try new things. Marshall Goldsmith (2007) addresses this issue, encouraging the leader to determine whether a leader was successful *because of*, or *in spite of*, a given behavior. Younger leaders have fewer solidified leadership patterns because they have less experience.

Usually the top leader has the most influence on the company. The Gen Y CEOs are the founders who have been able to negotiate that role during start-up funding and are therefore able to form the company to their own ideals. These Gen Y CEOs differ greatly from their older and more established counterparts – the Boomers and even Gen X'ers. They take risks, are more optimistic innovators and are comfortable in what others might experience as chaos. They are hiring their contemporaries, transforming the workplace and achieving success by doing it their way.

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THE TECHNICAL STARTUP – HOME OF THE GEN Y LEADER

The early stage company is distinctly different when compared with a mature company. The first task of a startup is proof of concept and later proof of viability (as a business model). This is typically an iterative process with many factors being tested in parallel and lots of false starts. It can seem quite chaotic. Through this repetitive process, successful tactics get reinforced and those that fail to produce results are abandoned.

Today's Internet companies, termed Web 2.0 companies, use an experimental model where features are launched and user reaction determines their fate (Tapscott, 2008; Lacey, 2008). This model capitalizes on the young leaders' comfort with change and, because it continues throughout the company's evolution, it may extend the young leader's viability as the company grows.
Kurtzman (2005) observes, that

> while startups are not as complex as established companies with multiple business units, divisional structures, and hundreds or even thousands of employees, they are often more complicated to run because large companies adjust their strategy annually and structure every other year, the startup is a work in progress with every element of the company in play on a real-time basis.

He further notes that the leadership skills necessary in a startup differ quite dramatically from those needed in a mature company—given that speed, not perfection, is the hallmark of the startup. It is these characteristics which make the startup an ideal environment for Gen Y'ers.

THE GEN Y LEADERS - WHO ARE THESE NEW LEADERS?

Generation Y represents a cohort born between 1980 and 1994 with a reputation for strong positive parental attention coupled with high educational aspirations and expectations. They have experienced repeated affirmation that they can accomplish anything they set their minds to, and as a result, many are more confident and ready to test new ideas than any previous generation (Twenge, 2006; Howe & Strass, 2000).

This generation was also exposed to ethical breaches in business and politics that occurred so regularly that these breeches seemed a predictable part of our societal landscape. As a consequence, Gen Y'ers have become cynical about the way things have been done before them. In addition, this generation is the first generation to grow up accepting technology as a natural daily part of their lives (Tapscott, 1999). When we combine these factors we further understand why these young leaders are uniquely positioned to thrive in technology startups.

Common themes I've observed while working with these young and successful leaders include:

- They are extremely optimistic, expecting both to become wealthy and to change the world.
- They want to be respected - acknowledged for their gifts and not discounted based on their age or lack of experience. They don't relate to their elders' concept of paying your dues.
- They don't value experience, traditional approaches, rules, or structure that they didn't create.
- They want to work with people in their own image and choose where they work, based on recommendations from their peers.
- They seamlessly integrate work and social life – colleagues are their friends and the workplace is also a primary social gathering spot.
- They experience a kinship with people of their generation embracing diversity - global, racial, sexual orientation - without even thinking about it.
- They fluidly dance between competitive (better than you) and collaborative (help you whenever you ask).
- They tend to distrust authority, particularly of older generations. This is understandable because we, their elders, often think we know better.

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When we view these young leaders relative to a developmental model, we see evidence that early success of significant magnitude creates a very different profile with a complex set of challenges and opportunities. While the linear stage theories are largely outdated, we can still imagine new skills and knowledge building on prior development – a progressive process.

So, what happens when the young, bright twenty-something leaps from college (or college drop-out) to CEO, skipping the progression of supervisor to manager and up the leadership ladder? How does he build emotional intelligence with so little time for reflection and interactions colored by the fact that he is the boss? How does he develop his capacity for intimacy when so much time is focused on work? Where and how does learning take place? What is the role of the coach in this fast-paced, youth oriented culture? Finally, how will engagements with these new leaders be different from coaching with more traditional clients and companies?

HOW ARE THESE ENGAGEMENTS DIFFERENT?

Coaching young leaders in a startup environment is different in at least three ways: the coach's effective presence, how the process works, and what we actually do to help the leader effect change.

The coach's effective presence

Jung called the total personality, known and unknown, the self. He identified two aspects: the *persona* or public self, and the *shadow*, the private self. Tolbert and Hanafin (2006) state,

"Presence represents the translation of personal appearance, manner, values, knowledge, reputation and other characteristics into interest and impact."

Presence is use of the self with intent. Tolbert & Hanafin (2006) identify three principle categories of presence: be honorable, be an effective change agent, and be curious. Hanafin (2004) created a great construct called the Perceived Weirdness Index (2004): when working as a change agent within a system, the practitioner must be similar enough to those in the system to avoid being rejected but different enough to provoke change. The client must perceive our "weirdness" within an effective range.

The significant age difference between these clients and me is an immutable reality. Other aspects of myself tend to communicate similarity, such as my love of technology, how I dress, and my general comfort in a fast-paced, changeable environment. Further, I can make some intentional adjustments in things like my speech patterns and interaction style. Speech patterns are absorbed often unintentionally. I have favorite phrases from startups like "I'm down with that" or "go for it" that are not helpful with financial services clients.

Any coach working in this milieu needs to make intentional adaptations. For me, I typically get up quite early to write, meditate and exercise. Young startup clients often get to work midday and work into the night. l chose to shift my schedule in response. Perhaps my most intentional and challenging shift was to a more casual interaction style, less focused on goal achievement. I think of these adaptations as both necessary to be effective and also as a means to demonstrate respect.

Respect is the cornerstone of any successful engagement, but it is exponentially more important in working with younger clients. Why? Because they have had so many experiences where people who were older considered themselves better based on seniority. Their perspectives have been discounted based on their youth. This dynamic is the source of great tension between young innovators and the experienced staff they ultimately need to hire. The issue is often framed as a matter of respect.

How do we coaches demonstrate respect? It begins with a careful inventory of our beliefs and biases. We need to cultivate an open mind and a non-reactive presence. In addition to delivering respect, it can keep us from embarrassing ourselves. I remember a huge mural in one client's entry, which I thought of as almost graffiti. Months later, when the client was moving to a new building, I sat in on a move meeting where the discussion was whether to sell the wall or pay to have it cut and moved. The artist was now internationally recognized and this work was quite valuable!

Presence requires a balance of belief in the client and belief in yourself as coach. Certainly there have been times when I wanted my perspective to prevail but the client's needs nearly always must take precedence. It is critical to believe that the client knows something about what she wants to accomplish, what's best for her, and what matters most.

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These clients are seldom interested in my credentials or certifications. They don't care that much about references unless they are from a contemporary or directly related to their work. What they care about is how a coach interacts with them. And while smarts, flexibility and a bit of lightheartedness help, it is presence that gets or loses the contract. Interestingly, in computers and networks, the term presence signals that a user is available and willing to communicate. Perhaps that is what we need to be demonstrating with our coaching presence.

Being in a state of non-anxious presence isn't always easy. First exposure to the start-up environment can be a bit startling. Work with a mature company and leader is more planned and structured than with young leaders in startups. Like the technology they invent, the engagement unfolds, finding its path organically.

I have traveled my own journey from an initial stance of seeing so many things that "shouldn't be that way" to a more relaxed assessment of what is, to a focus on those developmental aspects that I'm uniquely qualified to address. I am much less oriented to prevention than to effective response. A notable example concerns the issue of sexual harassment. In a mature company, leaders are expected to know the law, HR people present training. The Gen Y environment is significantly different with an open, even sexually charged, interaction style. Context and the views of the participants dictate whether there is a problem.

The coaching process

In my experience, the change process unfolds in very different ways with the Gen Y Leader. Perhaps an easy way to understand this is in comparison with a more traditional coaching approach. Below are two pictorial views illustrating a typical coaching process as I conceive of it for a traditional engagement (Figure 1) and for a Gen Y start-up (Figure 2).

Traditional engagements can be much more linear, sequential and structured. Perhaps this is due to a slower pace and also the leader's comfort with structure and predictability. These leaders often ask how the engagement will proceed and what we'll do when. Authors who write about coaching best practices often advocate working on a constrained set of changes (Goldsmith, 2007). This facilitates the measurement of results, which is important for the leader and for the justification of expenses.

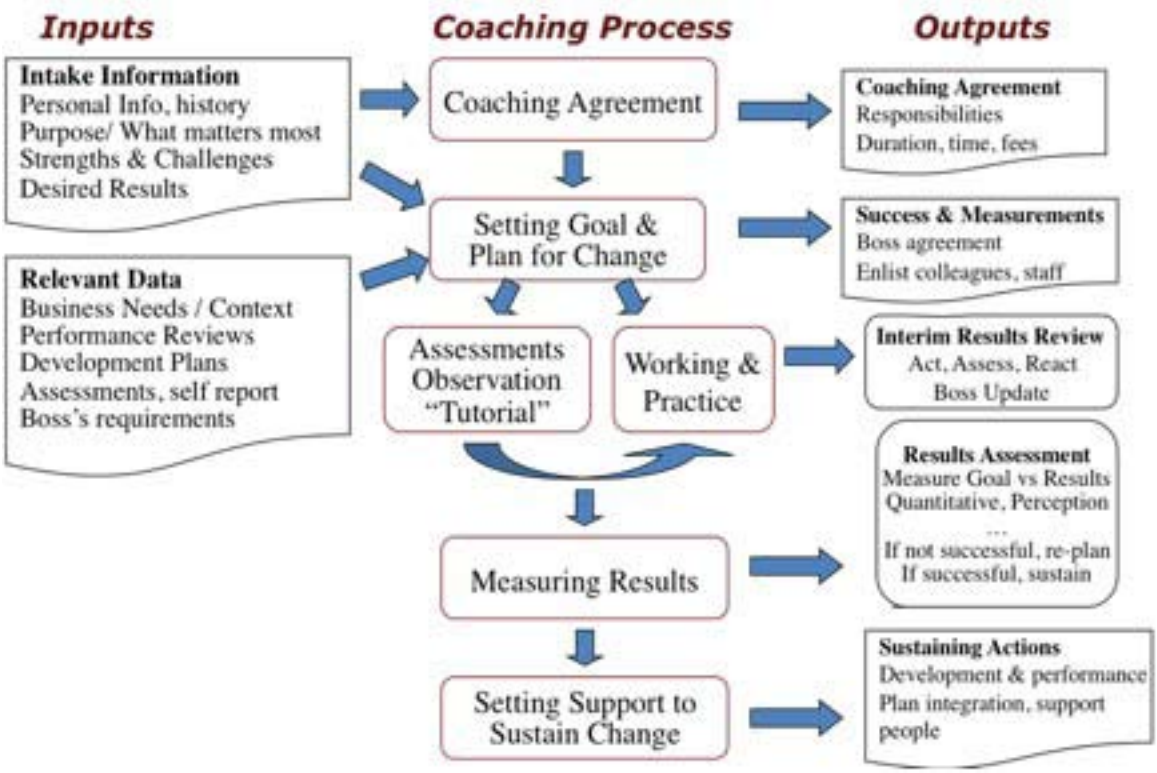

Figure 1. Traditional Engagement

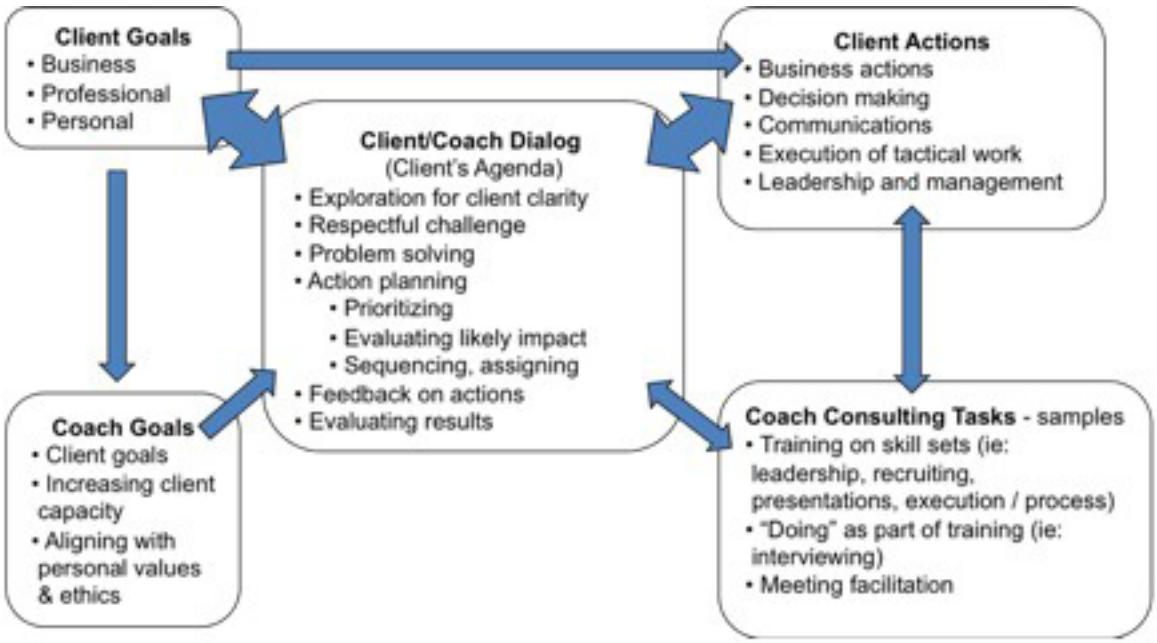

Figure 2. Coaching Process within a Start-up with Gen Y Leader

Working as a coach in this environment may seem easier because there are fewer fire drills and the predictability of a structured model is somehow comforting.

In the startup engagement with young leaders, two differences are striking: the number of things in flux and the speed of change.

In the startup engagement with young leaders, two differences are striking: the number of things in flux and the speed of change. Connor's *Managing at the Speed of Change* (1993), is a useful resource. Connor advocates adjusting the change volume to a level that people can absorb. This makes such good sense. However, in a startup, change volume is exponentially higher, with little focus on trying to reduce it. Working long and hard is a badge of honor. They pride themselves in their ability to be fast, responsive, and agile. In fact, one of the programming methodologies is actually named *Agile*. It isn't always pretty but it can generate amazing results. I work in mature technology companies that try to maintain, or mimic, that fast pace of the startup. The younger leaders accept it with much less challenge than their older colleagues.

While holding coaching principles sacred, these engagements also have elements of mentorship, advising and consulting driven by the start-up mantra: do what has to be done. The coaching approach requires maintaining one's balance amid all of the activity and adherence to guiding principles. The guiding principles I believe critical for the coach include: managing one's anxiety, maintaining respect, remembering that these are the client's decisions, teaching fishing rather than offering fish (unless immediate starvation is imminent), and adhering to one's ethical principles.

The contracts I have made with young CEOs tend to be much less specific relative to measurable results. This reflects the reality that this is usually the first time they have engaged a coach and often their first significant leadership assignment. They may even be trying to do something that no one has done before. We set a general direction, taking action and choosing our next step based on results of the last action.

Interaction is the key and therefore these engagements can involve more onsite time. For one client, I committed to two days a week for a year. The "workday" started around 11AM and executive team meetings often started at 10PM and went into the night. While this may seem irrational, it mirrored the development engineers' hours and left the day for interacting with business people on the traditional schedule. I received invitations to "hang out" instead of meeting requests and the conversations weren't bounded by a rigid schedule but rather started and ended guided by the dialog.

The intake process is different because little historical information exists. Often they have no prior boss or performance review. Typically they don't know what they want to work on. They don't

have much understanding of the expectations that others will have of them. The result is that they need more guidance from the coach. This is a challenge in that they distrust people who tell them how to behave or what they have to do. Therefore, it takes more time and care along the way. Even when initial goals have been identified, the engagement tends to unfold in a more organic way with experimentation being the norm.

At the heart of the engagement is a focus on skill building, strategy development, and other issues—but often in a different way. They want to start from a clean slate choosing what they will and won't do without much regard for traditional wisdom, best practices or proven techniques. These interactions often challenge a coach's belief structure.

The following example is illustrative. A young CEO posed this question: "Why do I have to have company meetings? I can just tell someone if I want them to do something different." Answers bounced in my head: setting the vision, functional alignment to achieve common goals, reporting results, motivating people, and so on. Then rethinking; if there is regular interaction and people ask when they want to know something, maybe company meetings aren't really required - yet. As coach, I was often trying to balance timing needs for structure in a very young and growing company. The coach in this setting needs to continually call into question whether or not an established 'best practice' is appropriate for this client/company at this time.

INTERVENTIONS TO HELP LEADERS GROW

Several factors govern what we do: the client and company goals, what the client has the ability/willingness to address, and the most urgent issues. Almost every engagement in this sector involves some work on leadership and management skills, top leadership team development, vision and strategy alignment, decision making skills, role clarity, interpersonal interactions, problem-solving and execution. Some of the most frequent issues that arise are around policy and rules, improving relationships between young innovators and experienced leaders, and dealing with issues of wealth and making a difference.

The diagram of this new engagement style (Figure 2) depicts the coach/client dialog at the center of the engagement. It is in this dialog that the majority of the work is done. I use the term dialog quite intentionally meaning an exchange of ideas and opinions. Good coaching skills of listening, mirroring, registering impact, invitational challenges are all useful here. These dialog sessions can be either a planned time or a short conversation following an event.

A typical client/coach dialog can be about clarifying the vision, asking who needs to understand it, what are the key tasks and activities, how can results be measured, and finally, who will do

what to make it happen. Within the dialog, the coach needs to register impact about what makes sense and what needs to be worked further. So much of my own development has been to optimize my ability to be a good dialog partner. To be useful, I have to be able to assess my biases, understand the basis of my ideas and opinions, and have best possible understanding of this specific context.

Ethical considerations often arise in these client/coach dialogs and again represent some of the differences between past generations and Gen Y thinking. I remember having a casual conversation with a client about a tech company attorney who was disbarred for out-of-compliance activities. My client said that it might be fine for him since he had made more money than he would make in his entire career as an attorney. I realized that I had no idea how this multi-millionaire ex-attorney felt about his choices. I realized that his ethical framework was being structured through exposure to the rarified atmosphere of Silicon Valley. I've come to realize that these young people have yet to refine their own ethical framework. I'm often designing methodologies to surface beliefs and values or to improve understanding of impact of considered actions.

Facilitation can be used to surface and address issues that impede success. In one company I facilitated an executive team offsite with a goal of clarifying roles and optimizing working well together. The first theme to emerge was the chasm between the young founders and the recently hired executive members with more business experience. It was a clash of values pitting innovation against tradition; intelligence against experience.

Facilitated activities can be used to help polarized groups find common ground. One process that works well takes the client through the following steps: (1) Note their own beliefs about colleague(s); (2) Recall the specific experiences that generated the beliefs; (3) Note what they think colleagues believe about them; (4) Engage in dialog with each other to validate or revise their perspectives.

Sometimes members of competing viewpoints will use nearly the same words to describe their complaints, for example, "You don't listen to me." Becoming aware of common ground allows the team to bridge those gaps and begin working better together.

One other common challenge for young founders is managing multiple competing pressures around control, wealth and making a difference. The Founder's Dilemma phenomenon is nicely explained in Wasserman's (2008) *Harvard Business Review* article. He points out that founders often want to maintain control, generate wealth and pursue their world-changing vision. It's tough to get all three.

How do people get money out of this company without giving up control either to funders, the SEC, or a seasoned CEO? The tension between experienced leaders and young innovators can be intense around this issue. The young are optimistic. I remember a heated debate in response to an offer to purchase the company. An experienced leader (mid-30s) said, "You don't know how hard it is to make just one crummy million". The founder's response was, "I don't care."

Some discussions are at the boundary of consulting and coaching. An example that comes to mind is a conversation about how to structure the product management function. My client had no experience with the role of product management but knew something had to change from the current approach. We talked about what he wanted and what he wanted to avoid. I subsequently explained the principles and various structures other companies used. The client ultimately built a structure that differed considerably from that used by others who were managing this function—yet he infused his own structure with some of the best practices from other companies.

The coach needs to be a person whom the client can trust to hold his best interest at heart - someone who will honor the client's perspective before giving advice. We need to manage our own impulse to share wisdom until invited by the client. We need to be willing to stand with the client when they have chosen their way and it doesn't work out that well. As for the successes, they belong to the client.

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THE CROSS-GENERATIONAL OPPORTUNITY FOR A COACH

I've learned plenty about myself through working in these environments. I had a good toolbox. I felt comfortable with my coaching theories, models, practices, and process; yet, I found myself continually focused on adding new competencies. Now I realize I was working way too hard. While theories and tools are important, they do not make a great coach. It's a powerful intervention to work with a client for a year and almost never dip into the tool bag that once seemed my greatest asset.

So, if our value isn't in our tools and what we know, where is it? Ironically, maybe it's not in the "doing" but rather in the "being". When I was first making my transition from consulting to coaching, it felt like I didn't "do" anything in the coaching model. Just asking questions seemed a pretty weak intervention set. Now I reflect on Virginia Satir who said she didn't really know how she helped people, or Carl Rogers who thought people changed in the presence of unconditional positive regard.

I've learned some things about business along the way. I'm more comfortable with ambiguity and understand the value of disruptive change. I'm less confident in my perspective and

I've learned some things about business along the way. I'm more comfortable with ambiguity and understand the value of disruptive change. I'm less confident in my perspective and happy about it.

happy about it. When I need to let go of long-held beliefs it seems freeing rather than de-stabilizing. I read to expand my perspective, and am less driven to affirm what I believe. I understand why young people get frustrated with us. Sometimes we don't get it. Sometimes we don't try, maybe because we're so invested in holding onto what we know. I've rekindled my interest in wide ranging conversation and experimentation. I'm just a little less careful.

In the end, I've come to notice several areas of growth and evolution for myself as a 50-something coach working with Gen Y Leaders. The highlights of these include becoming more at ease with less of a plan in place, shifting more from "doing" to "being" presence, embracing ambiguity and discomfort, and depending less on my trusted tool set. Perhaps other experiences could have facilitated this growth chapter for me but I think my work with the Gen Y'ers has been just the right intervention to compel these changes.

In conclusion, my experiences in coaching these young leaders have left me changed as a coach and as a human being. This seems a magical time in the world of work with opportunities to learn in powerful, dynamic ways across generations. If we are open, aware, and willing to take advantage of opportunities as they present themselves, the young can teach us. Instead of expecting them to slow down and pay their dues, maybe we can speed up and move forward with more trust and less restraint.

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Coaching the High Potential Leader: A Developmental and Holistic Perspective

JIM SUTTON

Organizations today are concerned about the impending shortage of leadership talent as a result of the looming baby boomer generation's exodus from the workforce with fewer "GenXers" and "GenYers" to replace them. 2008 is heralded by the media as the first year of the exodus. Consequently, companies are focusing more resources and time on talent reviews, identifying future leaders and succession planning. Preparing today's high potential talent for tomorrow's leadership roles is an urgent and pressing business priority.

The companies that are the best at developing leaders utilize an integrated talent development approach to solving their leadership development challenges. Coaching is an integral part of an integrated strategy. According to the Corporate Leadership Council (CLC), "coaching is highly valued by senior executives as a key development activity. It is ranked in the top five of development interventions and it ranks ahead of any other formal development program" (Corporate Leadership Council, 2003). Supporting the high potential leader's development agenda with coaching is a high leverage, high impact talent management practice.

So it is with defining a high potential leader, there is no "one thing" for achieving happiness and contentment with the one perfect and right definition of a high potential leader.

THE HIGH POTENTIAL LEADER

Who are we talking about when we refer to the "high potential leader"? A search on the Internet for "definition of high potential leader" yields approximately 5,540,000 results. The volume of results is representative of the multiple and varied points of view about the meaning of "high potential". In their October 2005 research report, *Realizing the Full Potential of Rising Talent*, the Corporate Leadership Council attempted to clarify the definition issue by defining the high potential employee as "someone with the ability, engagement, and aspiration to rise to and to succeed in a more senior, more critical role" (Corporate Leadership Council, 2005).

In the 1991 movie "City Slickers", Curly Washburn, the character played by Jack Palance, sums up his philosophy on the secret to happiness and contentment being "One Thing".

Curly never reveals specifically what that one thing is and he leaves it to the movie's other characters to figure out. And so it is with defining a high potential leader, there is no "one thing" for achieving happiness and contentment with the one perfect and right definition of a high potential leader. Each organization must define what "high potential" means in the context of their culture, goals, strategies and future leadership capability needs. However, the CLC definition does provide three key characteristics – ability, engagement and aspiration – that are valuable for crafting a definition. The CLC calls out that of the three, ability is the most important. They define ability as a combination of the innate characteristics (mental/cognitive agility and emotional intelligence) and learned skills (technical/functional skills and interpersonal skills). Engagement, defined as commitment (emotional and rational), discretionary effort and intent to stay, is the second most important. Aspiration, as third in importance is defined as the extent to which an employee wants or desires prestige and recognition, advancement and influence, financial rewards, work-life balance and overall job enjoyment. Although the CLC reports a hierarchy of importance, they emphasize that all three must be present. For the coach these characteristics are important to keep in mind because in the natural course of the coaching engagement, the process will involve exploring with the client elements of each. Understanding the characteristics and the degree of importance to the client helps to inform the work.

Today's high potential employee (HIPO) is most frequently a member of Generation X, a title for those generally accepted to have been born between 1965 and 1980. That period of time currently places them in the age range of their late 20's to early 40's with the mid-range being 35 years of age. To this point in their lives they have been about establishing their identity and independence, establishing their careers, creating important professional and personal relationships, and starting families. Frederic Hudson succinctly and beautifully describes the "Thirty-somethings" life stage in his book, *The Adult Years: Mastering the Art of Self-Renewal*. He states:

> … young adults unconsciously set for reaching the goals that so often constitute 'making it': career recognition, financial attainment, marriage and having babies, friendships, status, acquisitions, lifestyle, leisure life, travel and social leadership roles. There are many variations, some excluding marriage, others including marriage without children, and still others creating alternate lifestyles. The pressure is the same: make life happen to its fullest in this decade.

He goes on to state,

> The thirties may well be the most complex adult decade to manage …. When you're thirtysomething, you develop an increased ability to reflect on your life. Through intro-

> spection you begin to reevaluate your life decisions. You are still challenged to reach your goals, but you also wonder, 'Is this all there is? Is this what my life is all about?'" (Hudson, 1999, pp. 155-156)

Our understanding the GenXer is further expanded by considering the Corporate Leadership Council's report on the Generation X and Generation Y employee. Their research results indicates that the characteristics most often found among GenXer's are that they are motivated by independence in the workplace, instant gratification for work (short projects with instant reward), a nurturing work environment, opportunity for rapid advancement and unique work experiences (e.g., global assignments) (Corporate Leadership Council, 2004). In my personal experience of working with the Generation X employee these characteristics are evident.

It is probable that high potential Generation X leaders have by now experienced a series of life's "developmental opportunities" – adversity, mistakes, disappointment, accomplishments and successes...

In my work with HIPO leaders of this generation, I also find them to be smart, well educated, and comfortable with technology. They have high expectations of themselves. They are confident, independent, dislike hierarchy and see their managers more as colleagues than bosses. They love learning and are learning agile. They want and appreciate feedback. They are committed to their organizations, but are impatient with the status quo and are not timid about initiating and leading change. They value diversity, have a global perspective, are mobile and enjoy international assignments. Work/life balance is very important to them. To illustrate the emphasis of work/life balance: during the last week of Nike's six months-long leadership development program for high potential leaders, there is a half-day workshop focused on teaching principles for sustaining high performance while maintaining healthy, happy and balanced lives. The workshop is consistently rated among the highest workshops presented throughout the program and at the end of the program almost every participant includes a developmental goal to achieve greater life balance across the spectrum of their personal and professional lives.

In addition to their high expectations for themselves, the company's expectations of the HIPO leader are high. They are perceived by senior management to be bright, committed, capable, aspiring, and having a history of high performance. The expectation is that they will remain on an upward career trajectory, assume ever more responsible roles at an accelerated pace, and continue to deliver exceptional results. In the context of the organization's expectations, the HIPO faces significant headwinds in the current business environment – rapid changes in the market place, increasingly multiplying and aggressive competitors, a demand for continuous innovation, and challenges related to technology, globalization and economic uncertainty, to

name a few. The opportunities for success and the risks of failure are real. Because of their identification as "high potential", their successes and failures are highly visible to those who are watching and evaluating.

COACHING THE WHOLE PERSON, WHOLE LEADER

It is probable that high potential Generation X leaders have by now experienced a series of life's "developmental opportunities" – adversity, mistakes, disappointment, accomplishments and successes – that have played a part in shaping their character and their leadership style. David Dotlich, James Noel and Norman Walker wrote about these formative and developmental experiences in their book, *Leadership Passages: The Personal and Professional Transitions that Make or Break a Leader.* They describe thirteen passages that, depending on how they are managed, can either accelerate leadership development or derail it. One can quickly see examples of these formative transitions with a view of the book's chapters in the Table of Contents – Moving into a Leadership Role, Assuming Responsibility for a Business, Coping with a Bad Boss and Competitive Peers, Dealing with A Significant Failure, and Facing a Personal Upheaval. Dotlich, Noel and Walker (2004) propose that "there's more to leadership development than taking on a variety of work challenges" and that a holistic approach involves a combination of work experiences and life experiences that include adversity and diversity. It is highly probable that a client is involved or is facing into one of these "developmental opportunities" while they are working with their coach. Learning to successfully navigate through the challenges of these experiences enhances their "ability" factor by developing their emotional maturity and interpersonal skills. The coach plays an important role in helping them with learning about themselves and how they deal with adversity, ambiguity, and success, and helping them devise strategies to navigate and manage the challenges effectively.

It is into a four-way intersection of the high potential/Generation Xer's life-stage dynamics, personal and professional transitions, the organization's expectations, and a continuously changing and complex business environment that the coach enters the coaching engagement. In his book, *High Flyers*, Morgan McCall writes about having the "right stuff" which he says translates in the corporate world as "executive leaders demonstrate they have the right stuff by amassing a track record of performance under difficult circumstances." He contrasts development by "survival of the fittest" with development by "acquisition of new abilities". His point is that the latter is "more rational than hoping that the cream will rise" (McCall, 1998). Coaching the high potential leader is a purposeful and deliberate process for helping them develop their leadership capabilities in the context of the totality of their personal and professional lives.

At the Generation X "Thirtysomething" life stage, they are at mid-career and the HIPO set have positions that are generally at the "Managing Managers" level or "Functional Manager" level described in *The Leadership Pipeline: How to Build the Leadership Powered Company* (Charan, Drotter and Noel, 2001, pp. 52-79). They are preparing for a career passage to the next level. These transitions are occurring at a time when, as Frederic Hudson noted, they are asking themselves: "Is this what my life is all about?" It is a time when they deal daily with the pressures and the joys of adulthood – financial obligations, balancing relationship and family responsibilities with work demands, having a meaningful social life, rewarding friendships, travel and entertainment opportunities, and so on. As noted previously, it is also a time when they are questioning what really gives their life meaning and that raises questions about purpose and values. At this life stage and career level the coach is working with multiple facets of their personal and professional lives. One is about their personal purpose, meaning and values. Another is about how the roles of their human system (e.g., family, social, leisure, work and career) (Hudson, 1999, pp.137-138) works to shape, to challenge and to fulfill them. And another is about developing the leadership capabilities they need to lead effectively now and at the next level.

The value of transition coaching is to accelerate the process by collapsing the time needed to learn the new job, to build trust and credibility, to lessen the impact on the people in their organizations, and to speed up the time for delivering results.

Passage from one level to the next involves a transition. Research recently completed by the Learning and Development Roundtable concludes that forty-six per cent of transitioning leaders underperform in their new role. The report states that in any given year, nearly half of an organization's workforce feels the direct effects of leaders undergoing transitions (Learning and Development Roundtable, 2005). Those are alarming and significant data points. The value of transition coaching to the individual and to the organization is to accelerate the process by collapsing the time needed to learn the new job, to build trust and credibility, to lessen the impact on the people in their organizations, and to speed up the time for delivering results. The coach plays a key role in helping the transitioning leader in two ways. First, helping them identify the new business situation they are facing and helping them devise strategies to address the business issues that are appropriate for the situation. Second, helping the individual understand and acquire the new skills and behaviors required at the next level.

In his book, *The First 90 Days*, Michael Watkins writes,

> The challenges of transition acceleration vary depending on situational factors. It matters a great deal whether you are making a key career 'passage' in terms of level in the organization, whether you are an insider or and outsider, whether you have formal authority, and whether you are taking over a successful or troubled group (Watkins, 2003, p. 10).

Watkins continues by providing the following advice to the reader: "Practical advice has to be tailored to the situation, the level of the new leader, his or her experience with the organization and the conditions of the business" (Watkins, 2003, p. 11). Substitute "practical coaching" for "practical advice" in the preceding sentence and the message is the same for the executive coach, i.e., the coaching needs to be tailored to the situation. Guiding the client to identify, diagnose and evaluate the organizational factors that will impact their performance is an important contribution of the coach. Watkins's "STARS" model (an acronym for Start-up, Turnaround, Realignment, and Sustaining Success) is a succinct and useful model for diagnosing the business situation.

The authors of *The Leadership Pipeline: How to Build the Leadership-Powered Company* (Charan, Drotter & Noel,2001), propose that transitioning leaders must acquire three new ways of managing and leading – new skills, new time applications and new work values – and that each of these are different at each level of leadership. The authors point out that most leaders attempt to succeed in a new role by employing those skills and behaviors that have worked in their previous position. The new *skill requirements* are the new capabilities required to execute the new responsibilities. *Time applications* are about the new time frames that govern how one works. *New work values* are what people believe are important and are therefore the focus of their efforts (Charan, Drotter & Noel, 2001, p. 6). The skill requirements at the next level are very different than those at the current level. The adage of "what got you here won't get you there" applies to developing leaders. The model is useful for the coach in helping the client identify the differences between the new level and the current one.

Referring again to the Corporate Leadership Council's definition, "ability" is defined as possessing a combination of mental and cognitive agility and emotional intelligence. As I have already noted, HIPO's are smart. They have demonstrated their mental ability and that is a part of why they are evaluated as high potential. They are well educated. Many are graduates of business schools where they were trained in strategy, financial management, marketing, product innovation, etc. But business schools do not teach emotional maturity. Emotional intelligence is a critical element in becoming a whole leader. The HIPO must know and understand the influence of their emotions on their leadership behaviors and the impact of those behaviors on others. In their *HBR* article, "Primal Leadership: The Hidden Driver of Great Performance", Daniel Goleman, Richard Boytzis and Annie McKee (2001, p. 44) write: "our research ... showed an incontrovertible link between an executive's emotional maturity, exemplified by such capabilities as self-awareness and empathy, and his or her financial performance." Self awareness constitutes one's understanding of themselves – their personality, their

The coaching relationship with the high potential is an opportunity to help them develop their "heart" skills and "gut" skills and to know when and how to apply the right mix for different business situations and challenges.

strengths, their weaknesses and their impact on others. Goleman, Boytzis and McKee go on to say, "... leadership demands more than putting on a game face everyday. It requires an executive to determine through reflective analysis, how his emotional leadership drives the moods and actions of the organization, and then with equal discipline, to adjust his behavior accordingly" (2001, p. 44).

David Dotlich, Peter Cairo and Stephen Rhinesmith (2006) have further developed the concept of the whole, complete leader in their book, *Head, Heart & Guts: How the World's Best Companies Develop Complete Leaders*. Their point of view is that the demands of leadership in today's business environment requires that a whole leader must show up for any given situation and be capable of applying the appropriate combination of head, heart and guts to lead relative to that specific situation. The next situation the leader faces may be significantly different which will require a different combination. They propose that most organizations reward their leaders because of their cognitive abilities and intellect. But in today's tough business environment being the smartest person in the room is not enough. The coaching relationship with the high potential is an opportunity to help them develop their "heart" skills and "gut" skills, to help them integrate all three skills, and to know when and how to apply the right mix for different business situations and challenges.

High potential leaders love feedback and appreciate its value to inform their development focus. It is my opinion that the 360 feedback information by itself is incomplete and provides only a part of the picture.

WHOLE PICTURE VIEW

To coach the high potential employee in the context described above – whole person, whole leader – it is important to have a complete picture of the person. One that includes insights and understanding of the organizational environment in which the client works, the challenges of the specific business situation they are managing, a clear understanding of the performance expectations, insights about their leadership style, strengths, challenges and personality, and an awareness of the individual's life-outside-of-work circumstances. There are some executive coaches who do not value using a 360 feedback process. I find that using a 360 process, especially an interview process, to be an essential tool to help me understand the business environment in which the client works and to provide me with insights to the client's perceived leadership effectiveness, strengths and areas for development.

My experience with high potential leaders is that they love feedback and appreciate its value to inform their development focus. It is my opinion that the 360 feedback information by itself is incomplete and provides only a part of the picture. Using psychometric instruments provides additional insights to the client and me. I use a combination of measures that provide insights about personality, potential derailing behaviors, values, motivational drivers, and teamwork. Debriefing the results with

them provides additional information to explore and consider in our work together. When these measures are combined with 360 feedback data and the rich discussion that occurs during the debrief discussion session, I feel that I have a whole picture of the individual. Having the more fully developed picture is most helpful to me in my work with them.

One of my clients that I will name as Sarah for the purposes of this article manages a sizeable global business for one of her company's prominent product lines. She manages a team of managers who in turn manage others. Sarah has a track record of achieving highly successful results at her previous employers. Her performance history during the three years at her current company is one of exceeding expectations. Her reputation is that she is smart, has deep knowledge of the industry, is on top of her business, consistently gets results regardless of the challenges, always meets or beats deadlines, and she is valued as a team player who will do what ever it takes to meet the team's goals. She is identified as a high potential leader as a result of the company's rigorous talent review process. Sarah's next level, assuming a continuation of her career progression, is general management. Based on feedback from her manager, she has determined that for her to move to the next level she must change some of her behaviors and develop new skills that are essential for a general manager. Sarah's desire for coaching support is to help her develop her visioning and strategic thinking skills, to gain more confidence to present her point of view with greater impact, to have broader influence within the company, and to broaden her global perspective.

We used her company's 360 feedback survey process to provide us with insights to other's perspective on her strengths and areas for development. It was not a surprise to see the ratings for each of the measured dimensions at the upper (positive) end of the rating scale. The results made it clear why she was so highly valued by the organization. From my initial sessions with Sarah, I had the context of her family and educational background, her career experience, her personal and career aspirations and her perception of her strengths and development needs. The 360 survey feedback provided additional insights to how others perceived her leadership effectiveness. The completion of a full picture of Sarah as a whole leader was achieved through use of the Hogan Leadership Forecast Series.

The results confirmed her previously mentioned strengths. The results also provided deeper insights and understanding of aspects of her personality that she can leverage and aspects that will present some challenges to her achieving her full leadership potential. Behaviors that can produce potential derailment were identified. The data also highlighted the skills she needs to develop to demonstrate her readiness to lead at the

general management level. These skills included more effective delegation that would provide her more time to be in the marketplace to gain insights to market trends and consumer preferences, greater focus on the big picture and the future, and the ability to confidently present a cogent and compelling point of view to influence buy-in to her direction for her business. Lastly, the Hogan measurements provided her and me with insights to her core values and motivators that provide the basis for defining her purpose and her goals. The combination of multiple information points produces a full and complete picture of Sarah that informs where to focus our work together that to help her achieve her leadership development goals.

INTEGRATED DEVELOPMENT PLANNING

A leader develops as a result of life experiences, work experiences, formal training, learning from others and obtaining self-awareness of how their behaviors and actions impact others. The development plan is the thing that integrates all the challenges and opportunities for learning and development. One of the coach's high value contributions is that of helping the high potential leader integrate learning from personal and professional experiences with self-knowledge and understanding into a sharply focused development plan that focuses on the critical few, highest impact development actions. The plan's key elements should include the developmental issues, goals, and specific actionable items needed to achieve the goals, and how success will be measured. After the plan is completed and agreed to by all who have a stake in the individual's development, begins the coaching stage where practice and application of behavior changes, new skills, attitudes and habits require the greatest support for transformation and sustained change. It is during this time that the leader will experience the greatest challenges to executing their plan and achieving their goals. It is a period of time that requires the most effort for them to resist returning to old patterns of behavior and relying on those things that made them successful in the past and to stay focused on those things that will make them successful in the future. Intensive coaching during this phase provides the critical support to succeed with staying on plan and achieving their leadership potential.

CONCLUSION

In summary, coaching is a valued and vital talent management practice for developing high potential leaders. It occurs in the context of complex factors that affect the high potential leader's life and leadership effectiveness – the responsibilities and roles of their life stage, their aspirations, their questions about purpose and meaning, the organization's culture and expectations, the constant whitewater of a highly competitive and changing global marketplace, and how effectively they manage themselves

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through their leadership passages. The goal is to facilitate learning and change that develops them as whole and complete leaders, equipped to live effective lives and prepared to rise to and to succeed in more senior, more critical roles.

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Coaching During the Transitioning Fifties: When the Traditional Employment Contract has been Broken or Work as We have Known It Doesn't Work Anymore

JANET B. MATTS

In this article the author explores the role that can be played by coaches for those organizational leaders in their 50's who are making career decisions, having walked away from positions they have been performing for decades. They are leaving industries or firms where they have enjoyed long tenure, often losing their employment before they were ready. Corporate America continues to be characterized by chronic organizational change, including reorganizations, downsizing, right-sizing, mergers and acquisitions, rising healthcare costs and other workplace changes. At the same time, professionals in their 50's can find themselves confronted with optional or mandatory retirement, redefining themselves as a result, and creating a new path for the 'next chapter'. Small business ownership is on the rise, and many who find themselves in this place are looking for careers that blend their skills and create different options and life style changes.

Those in their 50's can find themselves in a transitional place that was not expected, often leaving at the peak of their career, having their retirement plans disrupted. In addition, from an adult development standpoint, we can often identify powerful shifts at both the physical and psychological domain at this time in the adult journey. These shifts can be intensely disorienting when we add in a surprise/jolt/crisis on the career front.

I've spent many years as a leader and an executive coach. I worked closely with fellow leaders inside a large global organization, coaching them at any number of critical junctures in their leadership journey. I've learned much in my work with others that informs my current observations and interests, but nothing is quite as profound as one's own experience in a time of transition. And so it is that I'm combining my own experience as a 50-something leader who has recently transitioned out of a long-term role inside an organization with my many years of coaching and working with other leaders faced with this transition. My intent is to weave together a better understanding of this phase of life, this unique transition, and the broader context and meaning this has in our world today. I've spent the past several months interviewing many leaders who are in the midst of this transition. This article shares stories from my own experience in this transition

time, as well as experiences of other amazing men and women in their 50's who are currently in various stages of this transformative journey.

Needing to continue to earn an income and not ready for a traditional retirement profile, fifty-somethings are defining a second career in this 'age of parentheses', i.e., knowing what employment and retirement looked like before and understanding how different it will look in the future. Recognizing the domain between these two places can define how we will get there. It is a changing pattern that will define future expectations and 'second careers' for many as we live longer and need greater financial security to do that. We must generate our own 'meaning' after key transitions have occurred, e.g., children going off to school, parents aging, careers ending, health issues…and create possibilities that are now becoming the norm.

The stories I offer demonstrate a variety of ways these transitions are happening and provide important considerations for those who are being coached during this critical time. Paying attention to the process of growth and development physically, mentally, and spiritually can enhance this critical place in our adult development and enable us to emerge re-energized and focused on "the next chapter". This is a new space and these individuals are defining a new way of thinking about and preparing for what life will look in the second half of life. And for myself, I reflect on this transitional time as a coach in a new way. I walk through my personal experience with a deeper understanding of self and a broadening of my own language as a coach. I approach coaching in a much less tactical, but practical, way. It is much more complex as we thread together all the developmental aspects of what is going on at this critical juncture in our lives. As you reflect on the stories, it is important to focus on the importance of a developmental approach to coaching and the skills needed to be in this space. Don't be fooled by tactics and busyness…it's about reflection and understanding and taking the journey.

THE TRANSITION OF A LIFETIME

I'm in New York City presenting at the Conference Board for my company, speaking of values and leadership, coaching and executive development. I am called back to the office to what I assumed would be a "reorganization meeting". I am in the middle of the conference, will return tomorrow to be part of a panel, but take the train back to a different sort of meeting. The leader of the division and an HR person ask me how the conference is going. I respond, "Great, I think that they are very interested in our work and there are some great exchanges. I am looking forward to being part of the larger panel discussion tomorrow." In response, "Great, I hope that you are making some good connections."

I had no idea how profound that comment would be shortly. He continued, "But the real reason to call you into this meeting is to let you know that your services are no longer needed." "Excuse me," I say, "Could I get a little explanation here?" "No time for that, you can go with the HR person and she will help you with the paperwork!" So, after twenty-one years in a Fortune 100 company, a great career and significant contributions, a legacy of leadership development and most recently, executive coaching, my services were no longer needed. Ouch!

So, here I am in the transition of a lifetime, knowing all about the "change cycle", sense of loss and what to expect, how I will be feeling…all the things I coach others about, only it is a little different now, being on the other side. I feel lost, angry, devalued, and pushed aside. Intellectually, I know the models and the theories, I am aware of the actual work of transitions in my coaching work, and so I assume knowledge of what to expect. I will make a smooth transition as a result and will model that behavior as a good coach. But I learn quickly that my "loss of identity" with a company that I spent almost half of my life with, have loved and made numerous significant contributions to, is profound and needs to shift. I am creating a 'different rhythm' for myself and my life, and must 'go through' the journey, not around it, to fully appreciate the transformation.

Initially, I stay busy for that is what I know and am used to, 60 hour work weeks, and lots of e-mail, travel and activities. I join the local health club, as I have lost the privileges of the company gym, lose a few pounds, get back into swimming and Yoga, biking and a daily exercise routine. I cook more, eat healthy, try new recipes, take some writing courses, and experiment with my 'singing voice.' My financial planner and accountant get a lot of calls and we create a plan, a budget and the beginning of my own business. In the meantime, I interview for positions that I don't get too excited about…the prospect of another "corporate job" doesn't feel right at this time…or perhaps I need a new rhythm? I do pro-bono work, some consulting and pick up a few coaching clients.

It's a new rhythm, one I am not used to, and I still question, "Am I busy enough?" Ahh, there is that 'enough' question again. What defines success? And how is that success defined? New answers to old questions are needed. I hire a coach to keep me focused and motivated during this transition time. I feel a newly found freedom that I haven't felt before, and a sense of loss that is hard to explain to others who haven't gone through this.

My experience, as I have learned, is not uncommon. The details and the company may be different, but the story is similar. This became apparent to me and allowed me to take a closer look at how we, as coaches, support others during this very turbulent

I hire a coach to keep me focused and motivated during this transition time. I feel a newly found freedom that I haven't felt before, and a sense of loss that is hard to explain to others who haven't gone through this.

time. So, in addition to my own journey, I interviewed others about their transitions. I discovered what it is that they have done, what they are doing, and what makes for success in their lifestyle changes, their new space. Is there also a 'spiritual journey' that is part of the process as well, a reflection on the 'larger purpose' and 'meaning making' as part of that reflection? There will be more and more of this, and I believe if we pay attention to the journey and learn from the experiences, perhaps this is the "best education of the second half of life."

As I reflect on my own story, there is a continued realization of this crisis opening a door to a new layer of development for myself, a new identity worthy of a deeper exploration. I find myself going back to Hudson's four phase continuous change model, The Cycle of Renewal (Hudson & McLean, 1996, p. 54; Hudson,1999, p. 57), moving from the 'Go For it' stage (previous

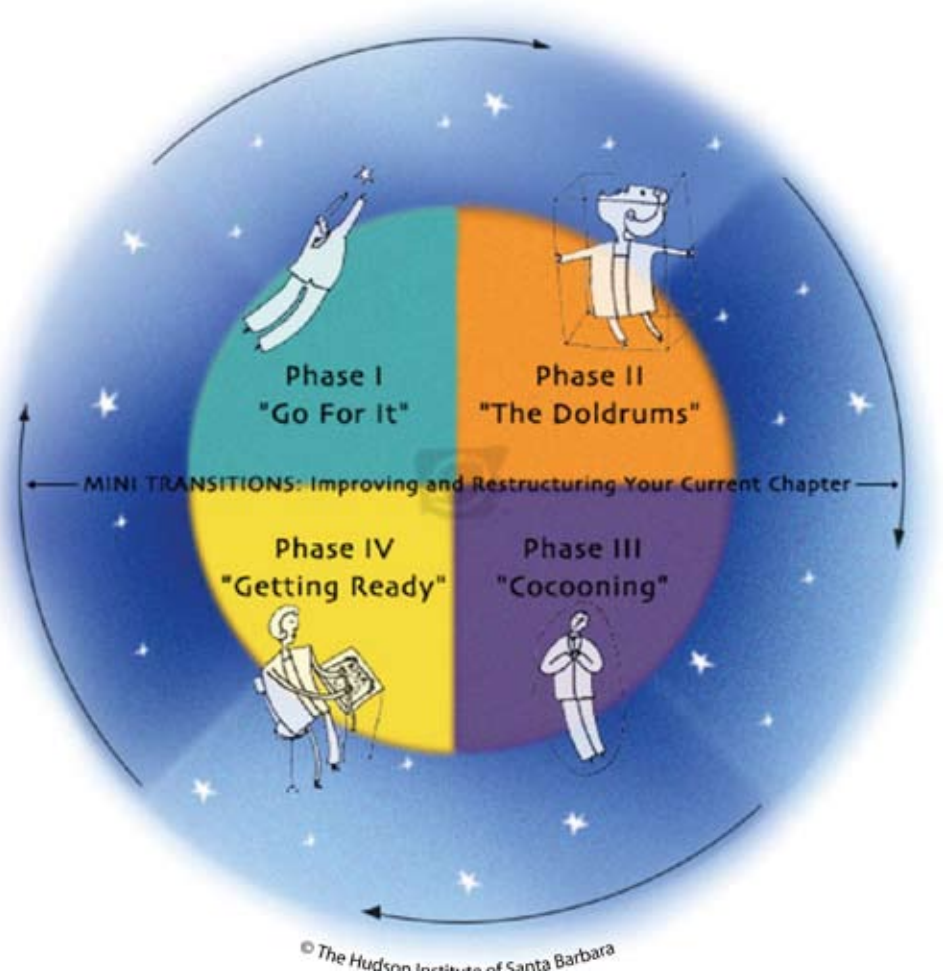

Figure 1. The Cycle of Renewal

corporate role), to the 'Doldrums' stage (job loss, loss of identity), to the 'Cocooning' stage (deeper search within), resulting in the 'Getting Ready' stage (trying new things, getting ready for greater

emergence and preparation for what's next) (see Figure One). *Voila*, this transition catapults one into the lower half of the model, the deeper change territory.

In the past, we had a mostly predictable and linear path from work to retirement. If we were lucky, we arrived with a pension and social security to finance our later years, and time to relax and do things like take trips, play golf, garden, or volunteer. Well, that security is gone, retirement packages are disappearing, and all of this is happening at an earlier stage. At a time when today's 50-plus person is redefining old concepts of retirement—for there is too much to be done in our world – creating meaning in our work still remains a key part of our life. Perhaps this new trend provides a space that ultimately opens up an opportunity to create a different path to our intended contributions -- to create more lasting value in the world.

As I always tell my clients, when we go through a transition, we have to "go through" the process, not around it. This is where the "Cycle of Renewal" can be helpful.

As I always tell my clients, when we go through a transition, we have to "go through" the process, not around it. This is where the above mentioned "Cycle of Renewal" can be helpful. It's in the "letting go" of the old that we "let in the new," and with this loss of long-time career comes loss of an identity. Like losing someone we love, we have a grieving period that can support the development of a new identity, a sense of new possibilities.

In her book, *Leap! What Will We Do With the Rest of Our Lives?*, Davidson (2007) describes the time in our lives called "the narrows". This is a transitional time to a different phase of life, one that restricts and limits the possibilities of what has been and creates a reduced sense of opportunity to what we knew before. For example, children leave the nest and we experience a new relationship with our mate, our relationships change with our changing selves, our parents age and need added support from us, etc. Organizations let people go before they can receive retirement privileges. No longer do we look in the mirror and see the same person, and it takes a bit longer to present ourselves to the world. Our energy is changing. Davidson (2007, p. 30) suggests that "if you don't do this voluntarily, the world or your body will force you to." It is this time that starts in the 50's, a time where we need to "let go of the past". We must look to the person we are that is deeper and greater. So often life's changes affect us, health issues show up, and we find ourselves dealing differently than we have had to do previously. In her book, Sara Davidson shares interviews she has held with many people across all walks of life, famous and infamous, about this transitional time. She notes that there is no single path that everyone will take. This generation will look for possibilities and change the path of the future for this generation.

In her book, *The Wisdom of Menopause*, Christiane Northrup (2006, p. 7) describes this stage of life for women as "the time

we transform and improve our lives, and ultimately our culture, though understanding, applying, and living in the wisdom of menopause." She suggests that the changes women are experiencing can be just as significant as the changes of adolescence. To understand these 'rites of passage', we find ourselves changing in ways that are not always easy.

In her book, *Understanding Men's Passages, Discovering the New Map of Men's Lives*, Gail Sheehy (1998, p. 302) describes a passage

> when nothing works, you feel off-balance and not safe. Some of the things that seemed most meaningful in life no longer seem important. Defenses that worked for you in the past are no longer as effective. You feel time pressure. There is an urgent sense of needing to make things happen, to prove to yourself to change what's not working. You find yourself asking 'Who am I? What do I really stand for? What do I want out of life at this point?' The way you feel about important people in your life changes. You know you're coming out of a passage when the feeling of 'aliveness' returns.

So I share with you thoughts from the interviews I conducted, with the unique stories, the transition strategies used, and most importantly the success shared…not always easy but deep, rich, and insightful. Here is a summation of findings useful for coaching people in this transitional place.

THE INTERVIEWS

In my conversations about those in their 50's transition, I came across some common threads that found their way into the conversations and the stories. The names have been changed and the stories altered to protect the confidentiality of the participants. Each person I interviewed had important lessons and experiences worth sharing. Their stories allow others to recognize the significance of this time, and to acknowledge that it is not unique to feel these things.

Susan

Susan, a licensed Ph.D. psychologist, worked for a small consulting firm for 16 years. She talked about the change in generations in workplace values during her tenure there. Initially, she felt that "If I worked hard, am responsible, the company would take care of me." Her thoughts changed when she saw the generations after her become partners sooner than her generation, as the rules changed. She and her fifty-something colleagues had the opportunity to work part-time for the firm when their children were growing up. Now as full-time consultants for the firm, they found themselves passed over for partner in the firm. A much younger, full-time candidate with far less experience gained the partnership role ahead of Susan and her colleagues. One of her learnings was the realization she had given

her organization far too much power over the direction of her own career. Her decision to take the risk of leaving and venturing out on her own was not an easy one, given her long-term work history and the earlier promise of becoming a partner with the firm. She saw that promise broken and the partnership positions given to younger employees. She felt she had little room for advancement and decided to take the leap into creating her own business and being successful on her own terms. Today, with a start-up business of her own, she has more business than she can handle and she has made a fundamental shift in the way she views herself and her career. She feels like she is making decisions based on her own sense of purpose at this stage in her life. She understands the "connectedness of her inner state to her outer state" that creates a different sense of what constitutes success for her in her work and in her life.

Betsy

This very successful HR executive had twenty years in Corporate America, creating stories in various industries about her search to use her potential to its greatest capacity. She learned that there is often a discrepancy between what is promised and what is actually delivered. She had many breakthroughs and a greater understanding of her 'epiphany' in her early 50's with a clear direction of 'what she was meant to do.' Betsy believes that the transition is still occurring. With two daughters in their 20's and an older husband, she speaks of the inter-generational differences in thinking and doing and would like to combine that knowledge and experiences in her "next chapter" which she is well on her way to writing.

Dan

This successful executive in senior management at a Fortune 500 company was let go by his company after 16 years as a result of his company being acquired. Although Dan has been through this acquisition process before, this time the 'cultural fit' seemed very disparate. He negotiated a package with the comment, "Enough is enough." Dan had access to outplacement services which helped him create networking opportunities and then started to consult three days a week as he looked at other options. More and more as he interviewed, he realized that his heart was not into another 'corporate lifestyle role', and he continues to look at possibilities. There are offers on the table which will present 'more of the same,' another corporate role similar to the one he left with a long commute. Working with a smaller firm or consulting were other options for Dan at the time of the interview. "It's all about possibilities and making the 'right choice'," Dan stated.

His two children are still in college, so it is important that Dan continue his earning power. His learnings to this point reflect "understanding the networking concept, understanding what that

really means, how it continues to support you, and how you help others in the process." He stated that

> Now I have a 'career management and transition committee' which keeps me focused and reminds me of the continued networking. Capitalizing on the opportunity to do things that I never had time to do, learning golf, riding my bike, continuing my running which I have always done…and focusing on some of the community service work that I wanted to do as well, keeps me busy. I am also contemplating a Yoga course which I think would be good for me to quiet my mind.

Amy

This senior executive at a Fortune 100 firm was coming back from a medical leave that was a result of burnout, a difficult boss and disillusionment. Amy spoke of her awareness of the criticality of taking care of her health and well-being. She opted to come back part time, leaving the fast-track for a healthier, more balanced lifestyle. She spoke of her work with a transitions coach who helped her "get her life back," and readjust expectations of her contributions in the organization. She lost 30 pounds and had needed surgery. Amy changed her lifestyle habits as a result of her awareness and realization of her need to pay attention to the life transitions that were surrounding her. Her husband is thrilled to see her healthier, happier, and home for dinner!

Until she stopped and took the time to evaluate, Amy had no idea of how unbalanced she had become. She spoke of learning more about the midlife transformation she was experiencing. Amy confirms Christiane Northrup's belief that at this time,

> more psychic energy becomes available to us than at any time since adolescence. If we strive to work in active partnership with that organic energy, trusting it to uncover the unconscious and self-destructive beliefs about ourselves that have held us back from what we could become, then we will find that we have access to everything we need to reinvent ourselves as healthier, more resilient women, ready to move joyfully into the second half of our lives (Northrup, 2006).

Many people are fed up with the greed and workaholic lifestyles that support today's success models. They see the personal stress and organizational dysfunction that has come with the celebrity culture. They're looking for something more lasting that will help them sustain multiple goals in their lives and in their work (Nash and Stevenson, 2004).

Julie

Julie's story is probably one of the more difficult ones. She lives in Detroit, an area of high unemployment. The housing market has deteriorated because of massive unemployment. Julie was let go

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by the auto industry with many others after 30 years, including her husband, without a pension (missing by five years, according to the formula). Everyone and his brother was hanging up a 'consulting shingle'.

According to Rachel, "the 50's are like being 22 with wisdom."

Julie talked about what has made her transition successful. "Creating choices is key…and to do that before you need to." Julie started to acquire her teaching credential while still at her past job and had at least another option to explore when she was let go. She states, "I might have made different choices if I knew that this financial element would hit so hard, but at least I have something else I can explore." Julie also spoke of home ownership in a depressed area, where the 'golden handcuffs' are the depressed real estate market: one's home is worth significantly less than one's mortgage. Moving to another area is not an option for the loss is too great. This story is a good reminder of the larger context as well – Julie lives in a part of the country and works in an industry that's 'in the doldrums' in just about every way. This bleeds into the experience on an individual level as well.

Julie talked about "recreating herself" and spoke of two kinds of people in the organization. She noticed and acknowledged "those that could change quickly, assess their skills and find a niche to turn the skills that they have into recreated opportunities…versus those that felt angry, entitled or hung onto disappointment." She spoke of surrounding yourself with optimistic people in your journey and 'letting go' of those who pull you down or feel sorry for you in your situation. She likened the process to the cancer survivor research about "thriversship" and spoke about the qualities of Lance Armstrong and his ability to beat his disease. The same process applies to a messy divorce. The research in this area demonstrates that same resiliency. She coined the term "your whining story" versus "your story over a glass of wine."

Julie was smart enough to have a foothold in more that one area of life and that's helped her gain some leverage in this tough time. Her idea of success was built within a 'success framework,' that allowed her to continue to succeed in a world subsumed by society's stilted notions of success (Nash and Stevenson, 2004).

Joe

Because he had some notice regarding his impending departure from a significant position in the financial industry, Joe was able to build his skills while still in the organization. Joe left with a retirement package including a pension and severance so he could be planful about his future steps. He now had the financial means to take some time to plan what would be next. He felt strongly about negotiating before leaving and allowing a lawyer to help him. This negotiation process was key to providing

the "artful ability to fight for what is yours, and know that you have done your best." This is a great opportunity to allow you to 'move on.' He also found himself needing to take a closer look at his financial situation which he had neglected. His transition was more planful than most, including taking advantage of outplacement services and financial advice. Joe also created what he called an 'advisory board'. He found that networking was the key. He looked to prospective clients through people that he had hired, mentored, and groomed in his career. He is now doing consultative work in his chosen field, and doing it differently. In Joe's case, he had the opportunity to prepare, a chance to grieve before the event and prepare a bit psychologically to ease the shock. Perhaps we all need to prepare for these "endings, and new beginnings" (Bridges, 1980).

It seems that networking is easier for those later in their careers, for they have the contacts and ability to connect through others because of relationships that have been built over the years.

Rachel

According to Rachel, "the 50's are like being 22 with wisdom... This transition, although difficult, has given me a whole new way of seeing the world, physically, financially and spiritually." Rachel too looked at her life when she left a Fortune 500 financial firm as a key executive. Her children were going off to school, her marriage was on the rocks, her weight had crept up and she was not feeling good about herself. Through her transition, working with a coach, she created her mantra, "Purpose, Courage and Harmony", which allowed her to lose 70 pounds and deal with the anger and responsibilities that now needed to shift in her family and relationship with her husband. She stated that the lessons around this difficult time were about "creating choice, owning the fact that you own that choice, shifting from passivity to activity, and owning your own decisions… Dealing with anger can get you unstuck. By nurturing and nourishing oneself, you can come through this difficult time."

Rachel now writes for an on-line publication about transitions and is exploring more options for herself that enable her to share her personal learnings. She is preparing to complete her first triathlon as her exercise achievements after her significant weight loss has given her great confidence.

Michael

Michael's thirty years in a Fortune 500 organization – including several years of reporting directly to the CEO – took a dramatic turn when the company was acquired. He no longer felt that his advice and knowledge were valued or appreciated, and he began to feel like he was being ignored. Michael talked about his transition as divided into three areas of focus. The first focus was on the emotional and psychological shock and loss of identity that wasn't anticipated. He states,

> The way I was let go was a shock! My self-respect was depleted and the rhythm of my life changed. I was surprised how difficult it was to 'get things done', and how

> often individuals I called didn't return calls once I left. If they did, it was over a week later. I wasn't accustomed to that and I took the infrastructure and the 'team spirit' for granted. The need to keep my self-respect allowed me to also do pro-bono work which gave me a sense of purpose and meaning during this transition.

The second focus was on pragmatic cash flow concerns. "It had a big effect on my spouse and family members. Looking at money in a different way and not being able to rely on an ongoing paycheck, takes some adjustment... Being planful and communicative about financial concerns is important," he stated, "especially with your family and others. Also, working with a financial planner, if not already a part of your team should be a priority as well. This will give you 'peace of mind' and an understanding of the 'bigger picture' of your assets."

The third focus for Michael was the ability to adapt to the changes you are experiencing, remain positive and stay engaged.

> Working out physically and keeping busy by networking and providing value was important to begin right away. At first it felt like I was adrift in a big ocean. I worked hard in my former company, people came to me, I really didn't need to initiate, and besides, I was too busy. I had to push myself to be the initiator, to network, but have learned to enjoy the possibilities and part of a process which will now always be part of my life. I would offer advice for all those in organizations to keep those networks alive.

It seems that networking is easier for those later in their careers, for they have the contacts and ability to connect through others because of relationships that have been built over the years. Michael's advice: "Create a portfolio of activities, discipline yourself, and then discipline yourself even more…Have patience and realize that it takes time."

Here are the lessons learned by Michael: "Be proactive and plan your transition, allowing for your 'board of advisors' to be in place before you need them. Understand the changes within and around you, accepting the sobering 'assembly line of life,' as we age. Deal with the conscious and unconscious thoughts in organizations and the sobering reality that especially in this culture age is not always viewed as an asset."

Barbara

A researcher and chemist, Barbara left a Fortune 500 company without negotiating an incentive package. She felt she'd spent too many years 'on the treadmill of life' and wanted to devote more time to her husband and an aging mom. Furthermore, Barbara could no longer get excited about 'increased market share,' and she asked herself, "Is this all there is?" She felt she wanted to do

The nature of teamwork itself suffers in an environment where the ability to do tasks really fast determines how they will be delegated and carried out. Collaboration is easy; teamwork is not easy, since everyone works at a different level and pace.

something that provided more meaning and impact in the world. To accomplish this, she spent time defining what she would need to earn in an independent role, researching medical insurance costs, and becoming more aware of the benefits of that lifestyle. With the support of her husband, also an entrepreneur, and others in her network, she recently made the leap. She is doing quite well in her consulting business and "has her life back".

Barbara also found that she had a lot of self-imposed commitments and took time with an executive coach to explore her 'giving nature' to others without giving to herself. Her blood pressure returned to a normal level without medication shortly after she left. Barbara now enjoys eating more meals at home with her husband, visiting her family on the West Coast, and enjoying life. Taking time to go back to school and pursue other interests in the medical field, she is looking to identify 'giving back' opportunities as well as diversifying her clientele to provide a steady income stream. Her success is built on relationships she established while in her previous roles. When asked about the possible creation of a website, Barbara stated, "I have enough work right now, and don't want to be overloaded with too much. I don't need to advertise at this time."

One of Barbara's greatest learnings is this:

> As a consultant, I have to be a better advocate for myself. When I was in the organization, it was all about my people. I have to suppress my passion and assertion that I exhibited in the organizations that I worked in and provide a 'coaching focus' based on that experience. I am in a different space in this role. In addition, one of the greatest lessons was the 'automatic-pilot' I was on for years. My question has been: would I lose my edge if I had to go back into a full-time role again? I am often more tired after a shortened day than I was previously working 10 -12 hour days. I realize that has to do with different energy expended and a different rhythm. I recognize that new rhythm.

Ahhh, the "rhythm of life". Do we take time to adjust it in our lifetime? Through so many stories, these adjustments are happening—blending passion with meaning, experiencing success through 'giving back', appreciating our changing selves as we care for ourselves differently. Through these stories of transition, we hear some common threads about dealing with lifestyle changes, emotional and psychological impacts, health and vitality foci, and networks. What do we need to take away as coaches who are working with this population?

COACHING POINTS

As a coach to people in this significant life stage, it is important to recognize the focus and discipline that are needed to create a

successful transition. There are some learning points, both tactical and developmental, to consider, depending on the situation and the planning that has or has not occurred before the shift. If one is lucky enough to have some time to plan, it can be a little easier; however, if not, there are practical necessities that underscore any transition and a developmental process to which one needs to pay attention.

Prior to leaving

The initial tactical actions include:

- Know your rights and negotiate. Hire a lawyer. It is like a real estate agent who sells your house and is able to see things objectively, without the emotional attachments you have to your home. A lawyer knows employment law, is able to see things clearly, and knows what is reasonable and what rights you have. Have a lawyer review all legal documents.
- Understand your finances; don't wait until the last minute to 'figure it out'. Too many people get caught off guard because they are unaware and then become overwhelmed with the process. People seldom make the best decisions under emotional stress.
- Create your networks…while you are working, and afterwards. Too often we are so busy with our daily routine that we are unaware of the importance of our networks in our 'next chapter'.
- Create a plan, hire a coach to keep you on plan, and allow time to nurture yourself during this transition and experience the loss. Too often, we think that we can "bounce back" immediately. This time and space provides an important cocoon for 'figuring out' what's next…practically and realistically.

During the transitional time

The tactical actions to be taken during the transitional phase include these:

- Take care of the practical, health insurance, budget, and support. Create your own "board of support" during this time and talk to others around you that have experienced this same process.
- Recognize your identity is changing…Shed the old, create the new.
- Hang out with positive and nurturing people, let go of relationships that make you feel "less than".
- Create choices and own those choices!
- Think about possibilities and continue to experiment with new ways of being.
- Nourish the body, take care of health issues.
- Exercise regularly eat right, and sleep well.
- Pay attention to what excites and feels 'right' to you.
- Create energy and have fun!

- Buy a pet, especially a dog, for unconditional love during this transitional time!!
- Network, network, network.
- Try new things, experiment and have a child's mind again! Stay optimistic!

Those who are most likely to cope well with whatever transitions they encounter have strong identity capital and adaptability resources.

Table 1. Aspects of Both Practical and Developmental Aspects Need Attention for a Healthy Transition

Psychological/ Emotional	Physical/ Health	Pragmatic/ Practical	Networks/ Connections
Loss of Identity Recognition	Health Issues Check Ups, etc.	Health Insurance	Family Supports and Communication
Create new avenues and interests	Fitness - Exercise	Financial – Cash Flow investments	"Let go" of negative relationships
Create a routine and schedule	Create energy through things you enjoy doing	Create a budget and identify needed short and long term finances	Create new networks previous contacts, new networks
Identify 'life style" changes	Eat Healthy	Check Tax Implications	Connect with people in similar situations
Think about Possibilities	Get enough Sleep	Stay optimistic and avoid Pessimism!	Create a 'Board of Support'
Don't forget to Have fun!	Meditate Stress Reduction	Repackage skills and abilities	Attend networking events and new activities
Be gentle with Yourself	Nourish the body, mind and spirit	Be realistic and and don't panic about money	Reach out to people that surround you on a daily basis
Buy a pet if you don't have one, it is unconditional love!	Create time "to be" rather than "to do"	Create an income flow as you define what's next?	Use the internet and other tools to create ongoing connections

The "nuts and bolts" of the tactical phases of the transition are important. However, during this significant transformation and at this developmental stage in life, here are additional considerations. As a coach, it is important to recognize these 'themes' and be able to share this important journey. It will take time and awareness.

- Resilience matters. Notice how resilient your client is, determine how your client has dealt with (or if they have dealt with) a major transition and life crisis in the past. This

can help you and your client determine the pace and 'push' for successful coaching during this phase.

- Work identity is a primary loss. This is a common thread for many and the 'rhythm change" from an 'autopilot' experience creates a period of grieving the old and finding the new. This can be different from one person to another and has a significant impact on a client and his or her family, friends and connections.
- Living from the 'outside in' vs. 'inside out' occurs in a major transition. This varies, based on the person's orientation, optimism level, change adaptability, and how the transition occurred. Was it planned? How was it handled? Was it a surprise or did the person have time to prepare? Has the person being coached developed outside interests or alternative plans or has work been the primary focus?
- There is a new layer of development opportunity focused not only on the 'doing' but also on the 'being'. With the depth of the transition and the developmental stage when it is occurring, this developmental opportunity can be the major educational link from the first to the second half of life.

Strength comes through care of others and production of something that contributes to the betterment of society—which Erikson calls generativity.

Post transition

Because of the combination of both tactical and developmental aspects, this process continues into the 'new phase' and the reinforcement of the learnings and 'next chapter' activities will sustain the developmental process in a new space. Combined with the choices one makes, the relationships one builds, and the significance of the changes, this is a rich and rewarding time.

CONCLUSIONS

As we move from the first half of life to the second, we shift our focus and life style changes in this critical developmental stage. Harrington and Hall (2007, p. 180) suggest that success in one's career is based on the ability to be open to new experiences and to be a continuous learner. An individual who is capable of perceiving options in a less-than-optimal situation will be able to successfully manage even an involuntary transition. Individuals who are able to develop a clear and realistic plan for change, those who have a positive outlook, and those who are resilient and future oriented are most likely to adapt well to the challenges the transition presents. Those who are most likely to cope well with whatever transitions they encounter have strong identity capital and adaptability resources. Kegan (1982) shows that each meaning-making stage is a new solution to the lifelong tension between the universal human yearning to be connected, attached, and included, on the one hand, and to be distinct, independent, and autonomous on the other. The Evolving Self is the story of our continued negotiation of this tension. In this significant transition, we see our identity at work and the connections and attachment it brings being challenged by independence during

I applaud the many Boomers. They can create the tools and retrieve the 'wisdom' they have garnered during their lifetimes and use these tools and this wisdom to create a better world for future generations.

this significant time. Does this crisis time in our lives challenge us to move to a new level of development?

How does this transition play out with Erikson's (Erikson & Erikson, 1998) stage of Generativity versus Self-absorption or Stagnation? This is a time where we tend to be occupied with creative and meaningful work and with issues surrounding our family. This is often when we can expect to 'be in charge'. The task at this stage is to perpetuate culture and transmit values of the culture through the family and work to establish a stable environment. Strength comes through care of others and production of something that contributes to the betterment of society—which Erikson calls 'generativity.' When we're at this stage we often fear inactivity and meaninglessness. As our children leave home, our parents age, our relationships or goals change, we face the mid-life crisis. We struggle with finding new meanings and purposes. Now with the additional of a work situation under transition, if we don't get through this stage successfully, we can become self-absorbed and stagnate. Creating the significant relationships lost within the workplace, and injecting those into the community and the family becomes a powerful coaching conversation for clients.

This is an exciting opportunity in our lives and can provide the foundation for the "second half of our lives" in a thoughtful and balanced way. Enjoy the ride and the experiences; you will find things out about yourself that you never imagined!

This truly reflects a "midlife crisis" time for men and women, one that is gaining in frequency and is opening the door to a new identity when there is still plenty of time and energy to 'live into' a new way of being. This can be a real silver lining, an opportunity we aren't able to exercise in the same way when we are 65 plus. Perhaps we are being given a new developmental gift.

As a result of this experience, 'living this transition', might I be better capable of coaching others in that space as well? As this transition has taught me, I hope that both the tactical and developmental pieces are important. What has shifted for me is my understanding of 'holding the space' to do this important transitional work as a coach and as a coach to open the door for clients to new possibilities. I think this type of coaching requires a coach with experience—the experience of really understanding the loss process, the deeper work that loss creates within ourselves and our core. It is a coaching process of a larger conversation that goes past the tactical. It goes deeper to the core of experiencing the loss, of grieving and coming out on the other side, and creating the new path forward.

In his book, *Boom!*, Tom Brokaw (2007) describes the disappointment of Boomers who have had the dream to "change

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the world," but weren't really able to do that. Perhaps this is the real time in the lives of the Boomers to make that sustainable difference. And just perhaps, like everything else the Boomers have changed, a new phase of 'the next life chapter' is being defined. I applaud the many Boomers who face this time with optimism, hope and excitement. They can create the tools and retrieve the 'wisdom' they have garnered during their lifetimes and use these tools and this wisdom to create a better world for future generations.

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Developing a Coaching Culture at TaylorMade-adidas Golf: An Exploration of Lessons Learned

BLAKE McHENRY, CAL HARRAH AND DAVID BERRY

In this article the authors describe their experience in the establishment of a culture of development at the TaylorMade-adidas Golf Company through the implementation of professional coaching. Their intent is to share the critical lessons learned as they worked to establish and sustain an internal professional coaching initiative. Through the lens of these lessons, the authors examine the genesis of the effort, explaining the challenge that brought formal development efforts to the organization in the first place. McHenry, Harrah and Berry then explore the various phases and stages of the coaching effort, providing a historical perspective on how and why it took form and the challenges associated with the different phases of the work. Additionally, the lessons they share will highlight the outcomes and impact of professional coaching on the business.

INTRODUCTION

At the outset, it will be helpful to the reader to know our definitions of two key terms. We define a "Coaching Culture" as follows: "A belief that business results and individual development can and must coexist. It is a commitment to offer feedback, candor, support and encouragement with the intent of building a stronger organization by intensifying the accountability and engagement of each employee." Additionally, we subscribe to the International Coach Federation's definition of "Professional Coaching": "An ongoing professional relationship that helps people produce extraordinary results in their lives, careers, businesses or organizations. Through the process of coaching, clients deepen their learning, improve their performance, and enhance their quality of life."

This article is our experience of what works best in our business setting. Lacking a "how-to" manual at the beginning of our professional coaching initiative, decisions were made from limited information about the best way to initiate and expand coaching in the organization. While sharing our path for success and its attendant challenges, we are also presenting our story in the spirit of the single case design - it was our experience and we are hopeful that the lessons may be helpful to others.

The lessons in brief:

- Crisis is a catalyst for change
- Executive permission and support is imperative

- The value of context is massive
- Effective coach selection is essential
- Coach training is a first step

BACKGROUND

In the year 2000 the leadership team of the TaylorMade-adidas Golf Company was fractured and frustrated. There was an absence of trust, meaningful collaboration and camaraderie. The situation was so painful for the CEO that he decided to do something different. He unofficially disbanded the team, discontinuing regular staff meetings that had become unproductive and that often devolved into conflicts of both personalities and personal agendas. In a very real sense, he sent the team members 'to their corners.' Having tried different tactics and methods to pull the group together, he determined that the one area yet to be explored was team and individual development. Consequently, he decided it was time for the group to take a hard look at their ineffective working relationships and explore how to develop greater awareness, tolerance and understanding as individuals and a team.

Because a fractured team is not uncommon in today's corporate environment, it is useful to explore a fuller understanding of the context in which this particular executive team and CEO were attempting, and failing, to function. Having reached a plateau of $300 million in sales, there was recognition that the organization was no longer a small enterprise. It was clear that what had worked before was not going to work if the team was to move past the plateau and into a significant expansion of market influence and leadership. Not surprisingly, the primary challenge was one of communication and collaboration. The team had grown larger in order to reach the $300 million mark, but what had not grown was its ability to share more, understand more and work together in new ways. Team members were stuck in silos, splitting off one another to protect their turf, living in a daily mindset of individual rather than company success. For the purpose of this article we will refer to this challenge as one of 'competition versus collaboration'. The CEO understood that for the company to take the next step in its development, his leadership team had to develop as well.

Having experienced the impact of professional coaching and leadership consulting before, the CEO understood the potential impact an intervention could have. With the advice and counsel of both his human resources leader and an outside consultant and executive coach, he decided to step into this new endeavor, believing that this focus on communication and collaboration would illuminate a way forward. With the personalities and conflicts that existed previously, he tasked his consulting partners to pull the group together through a leadership assessment tool and demonstrated his own willingness to hear some very tough

Having experienced the impact of professional coaching and leadership consulting before, the CEO understood the potential impact an intervention could have.

messages about his dysfunctional team. Participation came with significant resistance. However, the CEO led by sharing his own values, strengths and challenges. Team members followed his example and began to slowly change the old pattern of internal competition.

As a consumer products company, TMaG specializes in the manufacture of golf clubs, balls, apparel and footwear. Throughout much of its history the CEO has been an influence on the development of the brand and has shaped the company culture to reflect the core values of golf. Of primary importance has been faithfulness to the spirit and rules of golf. The authentic expression of golf's legacy through the product architecture is constantly examined and reinterpreted with each new product. Executives are encouraged to master the game and participation in the sport is a significant, if unquantifiable, part of the executive selection algorithm. Being authentic to the game extends to personal authenticity as well. It is important to be yourself. As an old company motto expressed it, "find your game." This emphasis extends far back into the company's history and makes the culture significantly different when compared to our competitors. This difference has been repeatedly verified by those who have been employed by other organizations in our industry.

In addition, the company has a strong track record of rejecting those who are inauthentic. The mandate to build a customer base through depth of connection informs every part of the culture. Early in his tenure the CEO recognized that to change the dysfunctional pattern of the executive team, collaboration would have to have priority over competition. The CEO rejected the notion of quick fixes to deeply challenging problems. He explained that anyone who avoided going deeper while attempting significant change lacked authenticity and therefore, effectiveness. In fact, the initial direction of the coaching initiative was strongly affected by the concern for depth. At an early offsite the team was given a choice to continue in the old pattern of "surface" relating or to change the pattern to foster greater depth. A useful metaphor was born at the offsite. The difference was identified as "diving rather than surfing." We see this shift as the introduction of a new level of development and differentiation taking place in the team. It is a striking example that fits Frederic Hudson's 'Cycle of Renewal' (Hudson, 1999). The team was 'out of sync' and instead of moving forward through a series of small tweaks and adjustments, the CEO enabled and instructed the team to do something quite different, challenging them to take a deeper look in order to re-purpose and redirect the group's effectiveness for one another and for the business. To state it ironically, the leadership realized that in order to reach higher goals they needed to go deeper.

Out of the team's initial interaction with the assessment and the challenge to 'dive rather than surf,' it became clear that a

The team was given a choice to continue in the old pattern of "surface" relating or to change the pattern to foster greater depth. The difference was identified as "diving rather than surfing."

small percentage of the team members were ready to challenge themselves to become more effective leaders of the business. Equally clear was that a larger proportion of the group wanted nothing to do with activities that required confronting and exploring the hard and personal questions raised through both personal assessment and the team discussions that followed. Those few who wanted to go further, however, were offered the chance to work one-on-one with a professional coach. These 'early adopters' made a decision that continues to resonate in the organization today. Their decision to embrace coaching as a way to move towards a more desired future marked the infancy of a deliberate effort to focus on professional coaching as a catalyst for leadership and team development and, of greater importance to the parent company watching from Europe, as a catalyst for better business results.

As stated earlier, at the time professional coaching was introduced to the executive team, annual sales revenue was $300 million. Today, the company is on track to reach a sales target of $1.2 billion. Clearly, the implementation of a professional coaching initiative is not the sole reason for this dramatic growth. Among other things, the company's recent success is attributable to game-changing innovations, market savvy, single-minded belief in the way forward and a collaborative, spirited working environment sprung from a culture marked by the deeply attentive care of its people. However, the coaching initiative is an important contributor as it took hold during this period and has become embedded and regarded as a hallmark of the organization. While it is difficult to quantify the relationships between our coaching initiative and the bottom line, we are confident that this initiative played an important role. Furthermore, we know that we have learned important lessons from the experience of bringing coaching to life in our company and it is with great enthusiasm for our cause that we share some of our learning in these few pages.

LESSON #1: CRISIS IS A CATALYST FOR CHANGE

Formal leadership development activities like professional coaching, assessment, and team development had the chance to take hold in the organization because our senior leader, followed by some of the senior team, recognized that the challenge of 'competition versus collaboration' playing out at the executive level required a different approach, a new way of thinking and acting. This challenge was felt so acutely by the CEO that he made a decision to explore a new way to get at the old problems he and his team were facing. To use Freud's analogy from archaeology, he saw that a beautiful layer has to be destroyed in order to get to the next level. There was a significant "want to change" on the part of the CEO that flowed from him to his team and, eventually, out into the wider organization. This is not surprising if you know that one of the ways in which the CEO excels is in

his willingness to ask for help, combined with his readiness to change accepted practices or people in order to get results. Just as a client's strong intent is the fuel that drives an individual coaching relationship, so too it is the fuel for organizational change. It is recognition that in order to develop we have to do something different. The same approach will not get it done. In this case it was recognition that to get through the present layer, once beautiful but no longer useful, and down into the next level of opportunity, a careful but deliberate exploration had to take place. As painful as it had become, it took courage to destroy what had worked for so long based on the promise of something that could not yet be seen.

Skeptics saw both dollars and time being invested in and connected to this effort, and they didn't understand what the return of investment could be regarding this coaching initiative.

The focus remained on the senior team during the following three years, what we will call "Phase One" of the coaching initiative in the organization. A series of interventions, off-sites and one-on-one consulting and coaching were focused primarily on helping both individuals and the group deal more effectively with the existing and recurring conflict (competition versus collaboration) in the organization. What was clear early on was that the group rarely, if ever, took time to reflect, think, absorb and discuss what was going on with them as individual leaders and as a team. "They" were never the subject matter of their discussions; rather it was always about the actions necessary to move the business forward. This orientation toward action (the 'maleness' of the culture), absent of reflection (the 'femaleness' that was needed), was the working style of the team members and represented their most significant challenge. The success of this period was both the sharing of a slowly evolving common language of development (the values, strengths and challenges mentioned earlier) and the ability to remain in the tension of 'action vs. reflection' in spite of some vocal and ongoing resistance to the work. The fact that the group, in a sustained and consistent way, stayed in this conversation, both set the tone and gave permission for development through coaching to begin to unfold in the larger organization.

This unfolding evolved in fits and starts with plenty of challenges along the way. First, and most significantly as will be discussed later on, it included the decision of the VP of HR to attend the Coach Intensive Training program at the Hudson Institute of Santa Barbara, a rigorous nine month curriculum. Secondly, and as a result of participating in the Hudson Institute experience, it included the invitation of a small number of external professional coaches to begin to work with members of the company's expanded leadership team--a group of approximately 60 directors and vice-presidents. This marked the first opportunity for company leaders beyond the executive team to be introduced to coaching as a significant vehicle for their development and, furthermore, it marked the first chance to choose between an internal or external coach. That said, there was limited accep-

tance from the senior team to expand the availability of coaching beyond the executive level and that skepticism threatened our effort to move forward. Skeptics saw both dollars and time being invested in and connected to this effort, and they didn't understand what the return of investment could be regarding this coaching initiative.

LESSON #2: EXECUTIVE PERMISSION AND SUPPORT IS IMPERATIVE

While the coaching initiative appeared to many as an organic outgrowth of the senior team work, this initiative was, most significantly, an aligned decision by the CEO and the HR leader to optimize and extend into the organization the development work being done with the senior executives. It was believed that individuals who hold leadership positions in the company need to be better equipped to lead their teams and functions well and, in some cases, get ready for more senior roles. Clearly this perspective was formed through the experience of the senior team as they confronted their own challenge of 'competition versus collaboration' and it led to the creation of both a mindset and a mandate that we will "develop leaders from within the company." In hindsight this is both an obvious and simple directive, but in the context of the time it marked a significant shift in the attitude of the organization that we would now take responsibility for developing the leaders of our organization. And, with that responsibility, came the permission and support to extend coaching into the ranks.

The wisdom of the decision to supportively and purposefully extend coaching beyond the executive team is proven in the way coaching has served to retain key leaders and provide support during times of organizational strain (increased contribution targets, reorganization and so forth). The absence of reflection or, put another way, the opportunity to safely and creatively explore new possibilities for old problems, was as much a need for the wider leadership group as it was for the executive team. In this way, coaching has provided a supportive harbor for the affected, which is to say that the opportunity for repair is built into the culture. While they may not have described it this way when the coaching initiative was just taking hold, there was and is recognition by the senior leaders that the TaylorMade-adidas Golf culture is, like Harry Stack Sullivan said, "more human than otherwise" (1968, p. 7). This willingness to see the culture from the perspective of a wide lens – that it is all things – as opposed to a more narrow and limited point of view, is the admission that the leaders of the company will experience a full range of emotional reactions and developmental challenges as they work within our four walls. Through coaching, we want to help them navigate that terrain as successfully as possible so that they can reengage stronger and more fully equipped to move themselves and the organization forward.

"What goes on behind the closed door of a coaching relationship?" This question, left unattended, foments the insecurity-based assumption that somehow coaching is a replacement for the manager's role.

This carries with it the challenge of translation: to continually define the relevance of coaching to the greater culture, and in the context of the original and continuing mandate to "develop leaders from within the company." We have found that the coaching initiative is at greatest risk when people begin wondering, "What goes on behind the closed door of a coaching relationship?" This question, left unattended, foments the insecurity-based assumption that somehow coaching is a replacement for the manager's role, which could be seen as a direct assault on the power and authority of that leader. Alternatively, we have seen leaders welcome coaching as a stand-in for their role in developing individual team members, leading to a form of benign neglect. We have to recognize that these scenarios represent new twists on the old challenge of 'competition versus collaboration.' Leader and coach can co-exist, if not collaborate, in the support of an individual employee's (and hopefully future leader) development. This type of collaboration in support of development, however, leads to another kind of twist which is that of the relationship between accountability and confidentiality. If you have more people involved, more people collaborating for the benefit of the individual's progress through coaching, does that somehow diminish or threaten the client's ability and willingness to dive as deeply as they may wish to go in the safety of their coaching relationship? It is with all of these questions in mind that we find that the value of having internal champions cannot be overstated. The most important role these individuals play is the continual reinterpretation of the ways coaching is helpful in light of both the current business environment and the ever-intensifying expectations of results.

Finally, we would like to offer a comment about the need for demonstrating a 'return on investment.' It is reasonable to expect that the support of internal champions, especially the CEO, would come at the price of having to prove how any of this really impacts the bottom line. We've explored the question at length, reviewed the literature and attended conferences on the subject to arrive at this conclusion: we don't have to validate anything if we have highly competent and connective coaches. The clients will validate the impact of coaching and, in our experience, they are not shy about doing so. The CEO has never requested proof that the coaching initiative works because he hears about its impact consistently enough and in a way that is directly related to his primary concern: getting the right people in the right jobs working together to grow the business.

LESSON #3: THE VALUE OF CONTEXT IS MASSIVE

After attending the coach training program at the Hudson Institute and inviting some of that organization's alumni, our first external coaches, to begin coaching relationships with senior leaders, the human resources leader decided to expand

the number of internal coaches by sending seven members of his team to the same training program over a three-year period. This decision, taken in 2004, led to an equal number of internal and external coaches serving the business. This would shift permanently in 2006 when it was decided that, with the internal capacity now at a sustainable threshold, external coaching relationships would be discontinued below the executive level in order to take full advantage of the investment made in an internal coaching group. Apart from the VP of HR, a Master Certified Coach through the ICF who has clients at the executive team level, the other internal coaches work at the vice-president/director level and below. Overall, we have sent fourteen individuals through the Coach Intensive Training at the Hudson Institute with the number of internal professional coaches now at nine. Accounting for this drop-off is that two members of the group were promoted into higher level jobs in the company and no longer serve as coaches; one individual left the company and now serves as an external coach; and three individuals have left the company to pursue new opportunities in other organizations.

Since the internal coaches know the language of the company they don't have to have it translated, allowing them to be more effective more quickly.

With some limited but important experience with external coaches it was determined in our case that the value of cultural learning and awareness held by the internal coaches outweighed the pure coaching technique and experience of the external coaches. The rationale behind this decision is the belief that, in the coaching relationship, the value of context is massive. Since the internal coaches know the language of the company they don't have to have it translated, allowing them to be more effective more quickly. Our experience to date tells us that internal coaches with both competence and the context of living day-to-day inside the organization are more effective, get more buy-in, and have more intuitive initial empathy than external coaches.

While we believe that being immersed in the culture allows you to feel the forces at work we also recognize that it can make you blind to new possibilities--which is why it is also important to explore the downsides of our internal coaching effort. First, we recognize that confidentiality and objectivity are two factors that might have been lessened because of the decision. For a variety of reasons—a leader wanting to set the agenda for their direct report's work with a coach; the reliance on coaching as a way to help someone be more effective; the pressures from the business to get someone or something "fixed"—both positive and negative, there are stated and unstated efforts to influence the coaches. After all, these individuals are peers of other company leaders and, in most cases, direct reports of executive team members. It is not uncommon for the coaches to hear something along the lines of, "I know you're coaching so and so and you can't say anything, but..." Another challenge is that while living in the organizational dynamic there is a predisposition, tied to

objectivity, to want to commiserate or collude with clients about the most recent conflict, reorganization, market shift, etc.

We believed that the value of context overwhelmed other factors. Why did we believe that? One answer is, of course, that "the self is the best tool for help." We trust that if the coach, regardless of internal or external status, sets the table for the 'self' of the client to do the heavy lifting in the relationship, the relationship will be more effective.

LESSON #4: EFFECTIVE COACH SELECTION IS ESSENTIAL

As the coaching initiative gained in popularity, the addition of qualified coaches became a necessity. An early goal of the program was the inclusion of coaches outside the HR team in order to insure the spread of coaching in the larger culture. Long discussions by the VP of HR and the coaching team revealed the challenge of selecting candidates who had the ability and passion for coaching and who were strategically placed in the organizational structure. It was reasoned that even if the extension of the program might mean some risk to quality, then an eventual benefit would be the added visibility.

At the same time, the pace of growth was discussed. The group was aware of a similar tension between organic growth and a more active push to extend the program. In the former, those interested in coaching would reveal themselves as they became familiar with the coaching effort. A more active approach would be to try to identify and select coaches who would help insure the viability of the program. In all of the discussion, there was a concern that the need for internal coaches would outstrip the company's ability to provide coaching for those requesting the service. This led to a discussion about the limits of a fully functioning program. Would it be better to limit coaching to director-level and above or open the program more widely? The initial plan led to the narrower focus but early success led to a somewhat greater inclusion. Currently, due to those successes, the program has reached its upper margins and is straining to fulfill demand.

In retrospect, two of the most difficult questions to answer during the course of establishing coaching within the culture have been, "How should the coaches be selected?" and "How many internal coaches are enough?" As we looked to internal coaches to carry the greatest share of the coaching work, we had to face the challenge of finding a sufficient number of coaches from within the business. The first and most obvious group to invite into this new role was the leadership group within the human resources department. These individuals were closest to the new initiative given their daily involvement with the VP of HR and, as stewards of the company culture, were already proven to be trustworthy and reliable in supporting employees and maintaining

confidences. This group continues to form the backbone of the coaching initiative, both in terms of experience and number of clients in relationship. We can attribute this reliance in large part to the role of human resources in the organization. The mandate of the group is to care for the employees of the company as comprehensively as possible, making leadership in the coaching role both a natural and logical way to formalize and extend their impact.

Because coaching was not yet understood by the larger culture, at times we felt that we were "one failure" away from risking the viability of the program.

Once we began to look outside of HR for additional internal coaches, we believed that to successfully follow our mandate of "developing leaders from within the company" those leaders required coaching by someone at or near their level in the organization. This narrowed the list of potential coaches to about 60 people, the directors and vice-presidents of the company, few of whom had declared any formal interest in becoming a professional coach. An invitation was sent to this group of people to attend a meeting at which the opportunity to pursue coaching was discussed and offered. From that initial invitation, a handful of company leaders expressed interest in moving ahead with professional coach training but only one line manager outside of HR would actually begin and complete the Coach Intensive Training program at the Hudson Institute. Over time, as coaching became more accepted and its impact more fully realized, additional information sessions were held revealing more interest and leading to four more line managers (again, outside of human resources) completing the coach training curriculum at the Hudson Institute.

Fueled by their belief in the power of coaching through their experiences as clients, the group of five line managers who decided to serve the organization as professional coaches brought their understanding of development as well as their business context to the role of coach. Missing from the equation, however, was a formal 'vetting' process or a set of standards to guide coach selection. We opened the invitation to the company leadership because we believed that those who stepped forward would come from a place of conviction and that with the addition of competence, both existing and learned, we would have strong coaches to offer to the company. While true in most cases, we didn't realize the political dimensions that would also lead someone to declare interest in becoming a coach. That someone might see the coach designation as a way to gain more organizational power, for increasing prestige, or as a distraction from their functional job responsibilities was not articulated. If unstated, it was understood that no one would put themselves through all of the work of professional qualification for reasons that did not consider the needs of the company to be primary.

As mentioned previously, to select coaches capable of coaching the existing and emerging leaders of the company meant

concentrating on the recruitment of director-level and above. Criteria consisted of the organizational level of the candidate plus the willingness to enter a long and continuing involvement. Capability was assessed by personal interaction, assessment and feedback from organizational follow-up. It was a formula of self-selection with both peer and management feedback.

After several graduating classes of coaches, additional criteria became clear and have now been put into place. For the purpose of preparation and selection, a minimum of 50 hours of experience as a client is required. In our estimation, the best preparation for coaching is being an active and consistent coaching client as it provides an additional measure of commitment and trial learning. Also, a demonstrated ability to coach as a manager, even in short unscheduled sessions, is now a prerequisite. This type of informal coaching is evidence of the manager's ability to distribute responsibility (and create accountability) among his or her direct reports.

To prepare the leadership level for the coaching initiative, the VP of HR and the Director of Coaching and Leadership Development educated the client group regarding appropriate expectations. The teaching was formal and informal and explained the most helpful uses for coaching to leaders and reports. It was a crucial step in setting the stage for the "roll-out" of the program. Unfortunately, it was difficult to expand the education to clients added to the program on an informal basis due to time and employee constraints. As a result, we attracted clients to the work who weren't educated regarding their obligation and responsibility. As we now realize, we risked some ineffectiveness. In a related way, we also felt the pressure for each coaching experience to be successful, particularly at the beginning. Because coaching was not yet understood by the larger culture, at times we felt that we were "one failure" away from risking the viability of the program.

These coaching challenges have appeared in at least two ways. A key aspect of coach/client preparedness is building a business case for the process. Whether coaching for skill, performance or development the target needs to be business-relevant, translating appropriately to the overall company goals as well as the needs of the individual. When lacking the overt support of bosses or supervisors, coaches have been denied a supportive framework for the important work of challenging the client's purpose, intent and patterns of behavior once they are in the relationship. Conversely, when the boss is included in the discussion of the client's goals, business relevance is a likely outcome and accountability can be a regular part of the coaching experience. It has been recognized that the beginning "coaching issue" may not be the eventual "coaching issue." However, if purpose and intention

When the boss is included in the discussion of the client's goals, business relevance is a likely outcome and accountability can be a regular part of the coaching experience.

have been created on the part of those stepping into the relationships, the accountability of coach and client will appear equal, increasing the power of the coaching exchange.

A second challenge is the fast cycle of change, allowing minimal time for reflection at the group level. Coaching has become a touchstone for those in the midst of a high intensity, "move first, ask later" environment. Not infrequently, coaching is used to restore reflection and understanding when clients feel challenged by the corporate rhythm. As much as reflection is needed, it is not easily described in terms that are understood by the dominant culture or the parent company. This requires on ongoing and intensive effort on the part of the coaching "champions" to translate and interpret the importance and impact of coaching for the business.

Our goal is to become increasingly more transparent to the company about what coaching is, how to get involved, who the coaches are and how to become a coach, among other things. Also, we strive to enhance the perception of coaching as a special privilege reserved for those people who are developing and emerging leaders, those who are hungry for and intense about their growth and, finally, those for whom there is a sound and solid business rationale for professional coaching. We believe that these seemingly contradictory objectives – at once open and exclusive - are, in fact, perfectly matched. Taken together they will allow us to increase our effectiveness by helping both coaches and clients work together with greater purpose and direction. The fact is that we are not a commune, we are a business and, while we believe in and pursue coaching that is holistic and client-centered, we do so to advance the interests of the business so that all of our lives may be enhanced through its success.

LESSON #5: COACH TRAINING IS A FIRST STEP

Preparation for the coaching initiative was important in at least two major aspects. Initial and ongoing coach education was necessary for the best practice of coaching technique and ethical standards. The education of the coaching clients about appropriate expectations for themselves, their direct reports and bosses was essential.

To maximize the training experience of new coaches, the VP of HR and the Director of Coaching and Leadership Development determined that coaching experience needed to be a priority. Upon entering their training program, the new coaches are asked to actively coach as part of a coaching internship. The obligation to provide clients to new coaches led us to encourage them to work with those who were interested and available. As we learned, people interested in beginning a coaching relationship did not always come from the target group that was our mandate

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to serve – the leaders and potential leaders of the company. While able to provide everyone with coaching experience, the larger challenge was matching the coach's level of competence with the client's need and leadership level. As a result, more clients were given the coaching experience which revealed a broad continuum of coach readiness to successfully manage an unprepared or uncertain client. In other words, individual ability strained to match the coaching need. As is common in many growth efforts, the number and type of clients stretched our preparedness.

As a response to this, and in an effort to secure the success of the coaching initiative, we began a coach supervision group to challenge and encourage the ongoing development of the coaches. This group was born out of the belief that the completion of a coach training program marked a true commencement for any coach and that the continuation of formalized learning opportunities was essential to build on their established foundation of competence. The group, meeting about eight times each year, became a forum for both skill development and the exploration of depth through connection, the discussion of coaching case studies, and learning about organizational and individual dynamics present in the coaching work. Additionally, it has allowed us to have an ongoing discussion about the current organizational context and themes so critical in helping us to serve our clients from a place of significant awareness and understanding. This early effort at supervision and the continuing commitment of the internal coaching group to meet on a regular basis is one of the most significant factors in sustaining the coaching effort in the company.

More recently, we have expanded the opportunities for continuous learning by the coaches. We have created the following standards for coach development:

Continuous relationship with 'best possible coach'. This stems from our belief that the best way to learn how to be an effective coach is through active participation and learning as a client. The coaches are not asked to focus this relationship on their work as coach but to make it about their own development as an individual and as a professional.

Consistent participation in one-to-one supervision. Building on the concept of the coach supervision group we have found that the coaches can explore their individual work with clients at a more intense and useful level through a one-on-one relationship with a supervisor or mentor-coach. These monthly meetings are an opportunity to explore specific client relationships and to evaluate approaches, ideas and possibilities to move those relationships forward with impact.

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Understanding and application of ICF Core Competencies and Statement of Ethics for professional coaching. The coaching group meetings are typically the forum in which we discuss and practice the coaching core competencies and ethical standards as established by the ICF. This is done through a combination of teaching, discussion, triad coaching practice, feedback and debriefing.

Annual participation in outside learning events. It is an expectation that the coaches will continue their learning outside of the organization by attending at least one coaching conference or something of related and relevant subject matter each year. The coaches are challenged to bring their learning from these events back to the group and to assimilate them into their coaching practice.

ICF credential. Each coach is asked to work towards the PCC credential offered by the International Coach Federation.

If we look at these efforts at ongoing coach development from a developmental perspective, we believe we are deepening the development of our internal coaches by looking beyond the foundational certification and experimenting with and ultimately creating an in-house 'gold standard' for coaching excellence. We've learned as much from what hasn't worked as what has and we've attempted to create the space and permission to learn from these 'fits and starts.' In so doing, we believe we are building a sturdy and reliable best practice approach to coach development.

CONCLUSIONS

As we have reflected on both the direct and indirect efforts taken in the organization to inspire and sustain a culture of development through professional leadership coaching, we recognize a handful of powerful lessons that may be useful to those for whom a similar endeavor is underway or for those whom are already living the daily opportunity and challenge of professional coaching in their organization. At the broadest level, the company's early experiences with the challenge of 'competition versus collaboration' within the senior team were based on a 'quick-fix' approach and, over time and inadequate results, there was a growing sense that this was not enough to sustain the organization's growth. This led to a deeper transformational approach spearheaded by the CEO and, only after this work had been initiated and sustained, was it possible to extend the developmental approach down into the ranks. As we have collected and considered the key learnings stemming from this experience, it has been an exercise in deepening our understanding of what is true about our work, including the positive and lasting impact of the effort as well as greater clarity about what we still aspire to achieve. Our work is, and will remain, unfinished and the

opportunity to reflect on these lessons has created in us a new resolve to take the effort to new levels of impact – to help each individual define and move toward their better future so that the organization may do the same. We offer these insights with both humility and hopefulness that our offering is generative and that it will encourage the good work of coaching and development being done in many organizations.

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The Power of Presence and Intentional Use of Self: Coaching for Awareness, Choice, and Change

DOROTHY E. SIMINOVITCH AND ANN M. VAN ERON

The authors of this article suggest that our contemporary challenge is dealing with the deep uncertainty of our times, while inspiring others to move toward and achieve desired goals is an implicit mandate for leaders, coaches, and consultants who work in organizations. Today's coaches facilitate creating order out of chaos in the face of not knowing what is needed or what Taleb (2007) calls the "unknown unknowns". This accelerated rate of change is a force shaping coaching as a powerful strategic tool assisting executives and leaders in their learning and change efforts. The basic "code" of coaching as a profession is that it is a practice intended to facilitate change and development (McLean, 2008). To face these challenges, the evolution of coaching requires greater understanding of the coach's role, their presence in the learning process, and their challenges in navigating through uncertainty.

INTRODUCTION

How does a coach inspire and support others to find the courage, energy, hope and perseverance necessary to reach desired goals? We suggest that key variables for the coach in influencing the learning and change process for clients are the coach's *presence* and *intentional use of self* as ways to expand the client's "awareness of possibilities". When this translates to the executives' presence and how they use themselves, it positively affects the well being of their organizations.

Presence is a far more potent variable than tools and techniques, allowing the coach to respond to the moments of uncertainty with distinctive impact and transparency that inspires others.

Coaches need to be guided by a knowledge base, emotional intelligence and a resonance with their clients. The coach's "presence" and developmental journey is important, for it is how a coach is present or how the coach is "being" that offers a catalyzing force in the client's learning. Presence is a far more potent variable than tools and techniques, allowing the coach to respond to the moments of uncertainty with distinctive impact and transparency that inspires others.

We define presence as the ability to exist and respond to the "here and now" situation of the moment (Darya, 1989). The art of strengthening one's presence, like improvisational jazz, is to be "in" the immediate moment while being able to respond to the rhythm of what is happening in the moment. We know it when we experience presence, and others do too. When we are not present it can feel like "we are not all there", or act in a manner

that suggests derailment from our own resources. The challenge is to recognize when we are derailed in relation to our own presence, and once recognized, our challenge is to learn how to quickly return to the aliveness of our presence-- where choice for action and intervention resides.

CASE STUDY ONE

Recently, one of us received a call from an executive coaching client. Janet had traveled across the world for a meeting with the leaders of her Fortune 100 company to report on developments in her global business unit. But she had had an interaction with a colleague who questioned some of the actions she was taking, and this shook her to the core. She lost confidence in her presentation, came to doubt some of her actions, and quite frankly, was afraid to go before the senior leaders. Yet after a coaching session, Janet was able to regain her sense of self-confidence and presence. Her meeting was highly successful, and she was able to get approval for a large and rather risky initiative. The senior leaders remarked that they could always count on her to be honest and to do what was best for the organization.

Why does an accomplished and experienced leader lose "what matters" about her presence—especially during critical moments? What does she need to be effective? How does she gain the trust and support of others? Derailment is a serious issue in executive functioning, most perniciously when it occurs in high performers (Singer, 2001) because of the costs to image and performance.

The intentional use of self occurs when we actively and strategically engage our resources in what feels and looks like an effortless application of our presence. We find that successful coaches pay attention to three areas of awareness when they effectively support others in becoming aware of possibilities and choices in moving towards desired goals: 1) awareness of self (being grounded and centered); 2) awareness of others (being aware of and connected with others); and 3) awareness of context (identifying and aligning what is needed and what is offered) (See Table1).

Table 1. Presence and Focus of Awareness

Focus of Awareness	Intention
Self	Being grounded and centered
Others	Connecting with others
Context	Identifying and aligning what's needed and what's offered

Our thesis is that coaches who are masterful in their use of self choose to use themselves in support of client learning, particu-

larly in expanding clients' awareness of themselves and choices available for them. These coaches are able to shift focus between these three areas while maintaining the integrity and alignment required for their own personal presence.

Let's explore each of these areas of awareness—self, other, and context. First we will define how each area of focused awareness supports the creation of choice. We will then explore how the three areas of focus work in tandem. We propose an integral, dynamic, and systemic perspective, wherein we are influenced by our environment and in turn influence our environment. The greater the awareness of possibilities and choices, the more opportunity there is for change. In conclusion, we will offer some ways to develop presence and use of self through awareness, chosen habits and engaged practice.

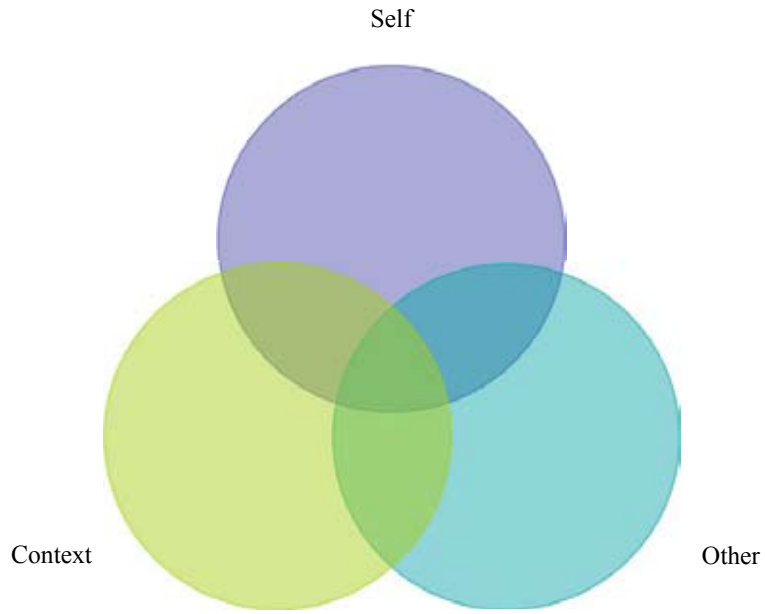

Figure 1. Awareness and Intention
The Capacity to be "At Choice"

AWARENESS OF SELF: BEING GROUNDED AND CENTERED

When we are present, we are focused in the present, rather than worrying about what has happened, what we need to do next, or what may happen in the future. The present moment actually holds the past as information and ideas as possibilities for the future. Being present allows us to be engaged and attending to what is going on right now. Rather than reacting to people and situations, we are able to observe our own physical, mental, and emotional responses and, with this awareness, be "at choice" about what we say or do. Being mindful first of our physical body and our sensory-motor responses to the engagement at hand helps us to feel more fully attentive, energized, and connected

to both self and other—in other words, to be grounded. Being attuned with our physical being in turn helps us reach the goal of being centered, i.e., a state of becoming calm and relaxed in both body and mind, particularly in the face of conflict or challenge. Such attunement is both an art and a constant practice.

Awareness practice is a core concept of gestalt based practice. First developed as the "Cycle of Experience" by founders of The Gestalt Institute of Cleveland, paying attention to one's awareness is both a practice and an assessment of process across all levels of the human system, from the individual to group and larger systems (Carter, 2004). The cycle of experience describes the organic process by which humans become aware of wants and needs as well as paying attention to the pressing concerns from the environment. At the individual level, the cycle of experience (see Table 2) assists an individual in understanding his/her immediate experience and how to make meaning out of naturally occurring phenomena. These awareness tasks ideally follow an organic order of: data collection, image creation, energy mobilization, moving to action, making contact and experiencing closure.

To be aware of the data regarding one's own "sensation", a person must attend to his or her immediate experience whether visceral, kinesthetic, emotional, or other mind-body senses. To be aware of what he or she is "aware" of, a person must be able to create a vibrant image out of competing wants, needs and stimuli. There are always multiple sensations competing for our awareness and identifying the most compelling "figure" of awareness out of all the different figures from our current "ground of being" is the art of being able to be alert to what "most" matters in the moment. To be able to be present, a person must have skill and comfort in attending to figures of interest that create anxiety or excitement and be aware of the force for taking action. To be aware of satisfaction, a person must be aware of the shift that comes from making "contact"-- the act of engaging -- with what is needed or desired and therefore feeling changed. To be aware of being satisfied or finished, a person must be aware of the meaning-making phase of closure. These are the points on the cycle of experience which are process points that allow us to determine our process of engagement in the moment.

Presence is determined by how successfully we can move through our cycles in ways that serve our needs and wants. Learning to be aware of our cycle of experience allows the coach to gauge when they are satisfying their wants and needs; and how to attend to and recognize the cycle of experience in others. At the individual level, the coach must model how to satisfy and use oneself effectively, and the cycle is a powerful conceptual tool to determine correspondence between awareness, choice and responsibility for taking action. When we do not move fluidly through our cycles

Identifying the most compelling "figure" of awareness out of all the different figures from our current "ground of being" is the art of being able to be alert to what "most" matters in the moment.

of experience, the place that we are "stuck" or unable to move through may offer us insight that we can use in our work. For example, if we do not have a clear image of awareness, our energy for action will be diminished. If our action is weak, we will not be able to make contact in satisfactory ways that allow us to shift our energy. If we cannot withdraw from a situation, perhaps we are not yet aware that we have not experienced sufficient closure or resolution to move away from the experience. Our cycle of experience allows us to formulate understanding of the present moment, and such understanding informs our strong presence.

Table 2. The Cycle of Experience

GENERIC	INDIVIDUAL	GROUP & ORGANIZATION
Data	Sensation	Scanning
Image creation	Awareness	Conceptualization
Energy mobilization	Excitement/Anxiety	Commitment of energy
Action	Action	Movement
Change occurs	Contact	Change of boundaries
Closure	Withdrawal	Assessment

From Carter, J.D. (2004). Carter's cube and a Gestalt/OSD toolbox: A square, a circle, a triangle, and a line. *OD Practitioner, 36*(4), p. 14.

MERGING PHYSCIAL AWARENESS WITH HABITUAL PATTERN RECOGNITION

A coach's goal is to merge these elements of awareness with the neuropsychological processes of habitual pattern recognition, positive self-talk, and cognitive coaching objectives. A seamless and intentional construct of coaching identity emerges out of this integration. When the coach is *grounded* and *centered in his or her awareness*, he or she can best serve coaching engagements and the client's desired goals. The power of awareness practice is that it allows a gradual development of the ability "to be present with one's mind and body" (Depraz, 2003, p. 60). You may notice, for example, that you can or cannot feel your feet on the ground, or sense your own steady or unsteady breathing, or notice your body relaxing or tensing. But how (or how often) does this self-awareness serve your coaching interactions when you are working to influence others? How often do you pay attention to your immediate cycle of experience and understand how what you are noticing might serve your work? Awareness of our cycle of experience is important because it holds data that we can use to determine what action to take. Action without awareness, a style so prevalent in our busy world environment, all too often leads to re-do or regret. Awareness of what is important that does not result in some action, all too often is experienced as unfinished business. Personal, subjective, here-and-now experience can be

selectively shared in service of the coaching work to be done (Rainey-Tolbert, 2004).

During moments of coaching, we may feel spontaneous, creative, and alert; time seems to stand still, and we can suddenly clearly see many available possibilities and choices. Superb professional athletes often exemplify presence–demonstrating intense internal focus, awareness of others and context, the ability to see possibilities, and the ability to act on these possibilities. Although athletes make it look easy, their presence is achieved through long-term attentiveness and training. In some ways, presence captures the sense of peak performance where there is slowing down of time, a psychological sense of space widening and a panoramic perspective (Scharmer, 2008). As coaches, our ability to be in our own state of embodied presence impacts our capacity to support the clients' awareness of their possibilities and choices for moving towards desired goals.

Applied behavioral science has taught us that we typically follow ingrained, habitual patterns about how we interact in and with our everyday world (Neisser, 1967). Bateson (1994) concurs and underlines how much of modern life is organized to avoid awareness of the threads of novelty. While we all have the capacity to be self-aware, we most often run on automatic in our everyday lives in the clutches of these habitual patterns of behavior. Each of us adheres to learned behavioral patterns that have served us well in a majority of experiences over long stretches of time. Because these patterns are presumably successful, we stick to them. At some point, habitual patterns let us down, particularly in circumstances where in-the-moment self-awareness and discernment is crucial for identifying alternative possibilities and choices. The challenge of presence for us as coaches is to consciously identify which habitual patterns and processes support our own (and our clients') capacity to be fully present and attentive versus the chronic, out of awareness, habitual behavioral patterns that damage, constrain or lessen our capacity to be fully present to self, other and context.

Goleman (2006) has made self-awareness of our immediate internal and sensory experience the essence of understanding emotional intelligence. Rapaille (2006) has helped us to understand that if there are no significant emotions, then there is no sustained learning experience. Another way of saying this is that analysis without emotional investment will not result in learning. We intuitively grasp a qualitative difference in our interactions when we and/or our clients are self-aware and present. The nonverbal messages we convey about emotional expression and the value of emotions color the strength of the learning experiences that a coach can support for their clients. The coach's presence needs to confirm and validate emotional expression by being a model and mirror to such possibility.

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Presence captures our attention like a magnet. It is a quality difficult to describe, but unmistakable when experienced in oneself or in another. When someone with whom we're talking is present, we experience him or her as *interacting* rather than *reacting* or *rehearsing*. The result is a response that has been labeled "resonance" (Goleman, Boyatzis, & McKee, 2002; Lewis, Amini, & Lannon, 2001). Resonance occurs when both speaker and respondent are connected to one another's affect and energy, attuned to each other's feelings, and mutually energized through this connection and attunement. Just as animals instinctively sense the energies of humans, we are "hard-wired" to respond to other humans in both positive and negative ways. We are naturally drawn to someone who is present in ways that activate resonance, and we experience the opposite, dissonance, when interacting with someone who is closed and unavailable to us.

Dissonance occurs when one's presence to self and others is off-putting or disjointing, whether intentional or not. When we move into a dissonant state, we stop paying attention to data, to what is occurring within ourselves, other people, and the environment. We ignore the data from our cycle of experience and miss opportunities to connect with what's important either to ourselves or to others with whom we are engaged at the moment.

We experience presence at a level that is tacit and difficult to clearly articulate. Yet we can sense in ourselves when we are in the presence of someone whose presence is available and "activated" rather than habitual because we feel a strong connection to our resonant energy. Michael Polanyi's (1976) dictum that 'we can know more than we can tell' referred to this tacit knowledge as a range of conceptual and sensory information and images that are available in making sense of something. Nordstrom (2007) identifies this tacit knowledge as a knowing that can be "transmitted". It may be that tacit knowledge gets amplified and transmitted energetically in resonance. While others feel energized, they may not be able to articulate how they were so impacted but they can identify that being in the presence of a coach who is "present" made the difference that mattered.

Certainly we are attracted to and pay inordinate attention to iconic figures whose presence changes others and our world (for example, Mother Theresa and the Dalai Lama), but one needn't be famous or in a position of authority to be forcefully present. The experience of being present is the most welcome of gifts. Discipline and practice encourage presence just as habitual and unconscious practices limit or constrain one's presence.

CASE STUDY TWO

Jeff, an executive, was referred to coaching because despite his technical expertise and role as a partner in a major consulting

firm, he did not create a positive impression with potential and new clients. When we worked with him, he admitted that he was uncomfortable with "small talk" and building relationships. He managed his stress and boredom by studying his slides and thinking of other things during meetings. He did not pay attention to his own experiences or what was happening around him. While this habitual routine worked for him when others were in the lead role, the habit was costing him organization clientele. Through executive coaching, Jeff learned to become more aware of himself and was able to see alternate behavioral choices; he initiated small changes, including making more eye contact and asking more questions. Even these small shifts significantly changed how others experienced and were impacted by him.

How did the coach support these changes? In a way similar to the situation with Janet, the coach was present and aware of her cycle of experience and the behavioral cycle she observed in Jeff. She assisted Jeff's awareness and his choices for new possibilities by sharing her observations of how Jeff interrupted contact with himself and others. The small changes he made yielded significant positive impact for him. By intentionally being open and non-judgmental, clients experienced a safe space to explore their patterns and consider alternatives. In addition, the coach's state of being confident, positive and assured was contagious and supported the coach and clients in successfully identifying what was needed.

Recent brain imaging research shows chemical and physical changes in those who are experiencing focused attention (Rock & Schwartz, 2006). This focused attention—this presence—appears contagious to others. Neuroscience research has identified and confirmed that we can cognitively and emotionally connect, or entrain, to the person with the more coherent focus. When we are self-aware, non-judgmental and open to possibilities as coaches, we actually energize others to do the same for themselves. It is in this manner, during times of upheaval and uncertainty for the client, that the coach's presence can literally energize the client in creating more coherent possibilities.

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STRENGTHENING OUR SELF-AWARENESS AS COACH

What is needed to become self-aware? Self-awareness requires *reflection*, i.e., taking the time to turn our attention inward towards our own sensations, feelings, and urges. By using the cycle of experience, we can identify and notice how we respond psychologically and physically to others and the environment. We need to recognize our habitual behavioral patterns—for example, our propensity to leap into action before we have a clear figure of awareness or remain in thought though we have the option of moving forward—and notice when these patterns occur. We need to pay attention to our intuitions and "gut feelings." This self assessment process is the practice of checking in with oneself.

The more skilled you are in checking in with yourself, the greater your ability to be at choice for determining how you want to respond to the identifiable options available to you.

It is useful to recall and examine those situations when we *did* feel present—how we responded to self, other, and environment. What thinking supports being in the moment and present? What fuels me getting in contact with the energy of being present? What responses are typical for me when I feel present? What do I know about environmental supports for presence? With which clients do I feel most present? What were their goals? With retrospective awareness, we can activate our "observer self" to assist our personal learning process in recognizing how we can better learn how to check in and calibrate our presence in future assignments. Consciously deciding to make a practice is to create a chosen habit as part of the developmental path towards attaining and maintaining presence. The habit of self assessment becomes the meaning-making moment supporting the effective adjustments required to deepen presence. This discipline is what we in turn model to our clients. We use our awareness of our immediate experience to inform our choice and actions. We teach our clients to use and to become more aware of their process so that they can take more informed action.

Janet, the executive who lost her confidence and became derailed right before a major meeting with senior executives, was able after coaching to regain her presence and confidence by grounding herself: by noticing her physical presence through feeling her feet on the ground and noting her breathing, by shifting her posture—by becoming more aware of her physical being. When her coach asked her to reflect on past successes, Janet was able to recall how she had felt both physically and mentally when she was present and in the flow. She remembered how she felt when she was confident, and could then calibrate her breath and make other physical adjustments to be in that space again. She recalled her line of reasoning for her recommendation and connected with her sense of integrity and doing what was best for the organization. She was able to make her presentation to the senior leaders of the company from a confident and assured state of mind and body. In turn, the senior leadership was attracted by her presence and her confidence in her proposed new endeavor, and supported both her and the project. Becoming more aware of how to be present supported her in the next meetings where she presented her proposal to peers and staff.

During the meetings, Janet often reminded herself that she had always done the best she could for her organization and staff—but also that she was open to learning. This positive self-talk supported her in being more present—self-aware, consciously in touch with her recognized core strengths, and physically grounded and mentally centered. What had kept

Janet from being and staying present was self-doubt and fear of other people and the environment. Presence is too easily undermined by one's own reactive (habitual) thoughts and emotions. Resonance is too easily routed by dissonance, which distorts and blocks our intake of all the data—of self, other, and context—that may lead to the recognition of other possibilities and choices. In order to maintain a supportive and productive presence, we need to discipline our inner resources to focus on staying in intentional contact with the positive data of self, other, and environment that best serve our desired identity as well as the desired goal of the coaching engagement.

The visceral sense of self-awareness that confirms our grounding and the psycho-physical sense of focus that confirms our centering is essential for having a successful impact upon others with whom we are engaged in coaching work. When we ourselves are present through grounding, centering, and in the moment self assessment, we assure ourselves that we are in the best possible position to influence this for others.

PRESENCE REQUIRES PRACTICE

Slowing down for self-assessment at regular intervals or at specific moments—noting the situational and psycho-physical qualities of those times when you do feel present—builds a repertoire to call upon. This can support being grounded and centered in yourself in any coaching engagement, whether formal or informal, face-to-face or over the phone, planned or fortuitous. Some coaches ritualistically self-assess when they are introduced to someone new, when they sit down at a meeting, or just before they pick up the phone to make or take a call. It is valuable to be able to build a practice of checking into one's database of experiences, particularly in the moment that can inform choices to be taken. It is often helpful to take up "mind-body" activities, such as yoga, meditation, gardening, craft work, or running as they support the kind of physical and psychological self-awareness that leads to and supports presence. Such activities bring body and mind into closer contact while simultaneously allowing for the intake of data from self, other, and environment. The new sciences of the mind have enlarged our understanding that our bodies are recognized as being both physical and experiential, and therefore both biological and phenomenological (Varela, Thompson, & Rosch , 1991). Our physical "practices" can strengthen our capacity to be present in aware and mindful ways.

Conversely, habitual patterns actually "hard-wire" our psyche so deeply that our biology, perception, and capacity to attend to the environment in effective ways are affected (Boyatzis & McKee, 2005; Lipton, 2005; Rock & Schwartz, 2006). What triggers predictable reactions from you? Perhaps you are habitually suspicious of middle-management employees' intentions, or perhaps

you habitually expect yourself to fail in specific organizational environments. Although these behavioral patterns are likely to be long-standing and may have helped you function successfully for some time, they may now be preventing your further personal and/or professional growth and thwarting your capacity to be present in your coaching work. As with all self-change efforts, it takes courage to name and discard habitual behavioral patterns that are no longer supportive. Nevertheless, once we recognize a pattern that no longer serves us (or, by extension, our clients), we can begin to build our psychological muscles in anticipation of other ways of being and behaving that *do* contribute to an effective sense of self and to successful coaching work. The dominant change theory of gestalt practice is the paradoxical theory of change (Beisser, 1970), which suggests that focusing, with full awareness on the phenomenological event (our perception, behavior or problem situation), will paradoxically bring change out of making full contact with the immediate experience. Rather than coercion, persuasion or interpretation, it is the full acceptance of the "status quo"—the "what is" of the moment—that stimulates the shift of change. According to Rock (2006), we change what we pay attention to and what we pay attention to changes us. Rock's work on the neuroscience of learning confirms the phenomenological learning process which reconnects us back to the core role that awareness plays.

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AWARENESS OF OTHERS: CONNECTING

The goal of coaching is to support clients as they seek to reach their desired goal(s) by offering encouragement and support, identifying possibilities and choices of which the client may be unaware or wary to pursue. Focusing on clients' perceptions—what they are feeling, thinking, paying attention to—and on clients' wants and needs is central to the coaching engagement. Presence and resonance are necessary components that create a mutually creative space for awareness, learning, and action. Effective coaches are attentive to the "whole person" (both words and body language) and are curious, open and inquisitive about every aspect of the coaching situation (self, other, context). Effective coaches are open to learning about these aspects without judgment or evaluation, and are intent upon finding the best available means of assisting the client in reaching the desired goal(s).

By being appreciative and nonjudgmental with Janet, the executive who lost her confidence, the coach was able to connect and created a safe interpersonal space where she could more willingly explore her feelings and thoughts. It became clear that when challenged by a colleague, Janet slipped into a habitual pattern of doubting herself. Simply recognizing and paying attention to this pattern, without judgment or evaluation of it, Janet was able to examine her circumstances and consider alternative responses. The "paradoxical theory of change" posits that

heightened awareness and full acceptance of one's *current* state of being ("what is") leads to change through the full discovery of "alienated parts" that have been hidden from habitual awareness. As Janet reflected on her habitual pattern of doubting herself when challenged, she became conscious of how often she had stepped out to make difficult decisions that benefited the organization.

In fact, much of her career success was based on such calculated risk-taking. She saw the strength of her decisions, and noted also how effective she is when she shares her perspective and analysis of a situation with her colleagues. She then realized that her long-time pattern of immediately doubting herself whenever questioned probably served her adequately in an earlier part of her life, but was less useful, even damaging, in her current position. She alienated her own confidence in service of an old pattern of self-doubt. She acknowledged the value of slowing down to better assess the "big picture." Janet is more open to new, in-the-moment data which was to recognize how she alienates and disowns her strength in making difficult decisions. Coaching practices of quietly listening, asking questions, and providing appropriate and timely feedback supported Janet in exploring alternative ways of responding to challenges. These practices enabled Janet to meet with the leadership team with greater presence and self-confidence. The coach's discipline of being able to hold the space through their non-judgmental presence does matter.

In the presence of the open-minded and open-hearted coach, clients are supported and energized to do self-work they could not have done on their own, or have been unwilling or unable to do on their own. The presence of the coach contributes to the stores of awareness and energy available for action. In our everyday lives, we frequently attend to and test our environment for such impinging features as the weather, the latest news, and our sense of safety—whether something presents a threat or an opportunity. Clients pay a similar metaphoric attention to their coach, noting the mood the coach projects (the weather), the messages the coach sends (the news), and the sense of trust the coach establishes (the threat or opportunity). The coach's skillful "use of self" as an instrument of change makes the work challenging and exciting for both coach and client.

While focusing on the other (individual or group), effective coaches continually check in and pay attention to what they notice in themselves as well as in the environment. Presence requires curiosity about the here-and-now experience, and a commitment to seeing oneself as a microcosm of the moment. If we are experiencing discomfort, we should identify what we are feeling and assume that something in our immediate environment may be influencing us. Curiosity will prompt us to try to connect our interior experiences to the immediate moment. The essence

of use-of-self as an instrument is to "pay attention to the process by which we make our choices and decisions. It is all about how we choose to perceive the world, how we expand our choices, and then decide what to do in the specific situation at hand" (Patwell & Seashore, 2006, p. 6).

Presence requires curiosity about the here-and-now experience, and a commitment to seeing oneself as a microcosm of the moment.

While coaching Jeff, the partner of the firm who has challenges dealing with new clients, the coach noticed her attention drifting. She perceived that Jeff wasn't terribly interested in the session. This seemingly "negative" information is potentially helpful data that can be used to support Jeff by selectively sharing the experience of connection and disconnection with him. In so sharing, the coach is present, curious, and paying attention to the phenomena of building relationships. Perhaps the coach asks Jeff to engage in an experiment, wherein both parties pay attention to when *connection* seems most powerful: Is it when he is speaking about his slides? Sharing a personal story? Asking a question? In addition to exploring the impact of Jeff's overt behaviors (e.g., eye contact), the coach focused on examining what he may evoke in clients and staff before he even speaks.

Perhaps Jeff's senior role already causes people to be cautious and expectant; perhaps starting out with his expertise makes people feel insecure or leads them to think he believes himself superior. Perhaps Jeff's unwillingness to share about himself or to show vulnerability causes people to feel less confident in his presence and to project "lack of interest." By sharing personal response experiences and by exploring and experimenting, Jeff became more aware of how he connects or disconnects with clients, and discovered some ways to strengthen his ability to connect. Creating an open and trusting environment, where a "safe emergency" can be introduced, frees both practitioner and client to experiment with new behaviors and to learn what will be most useful for clients in their particular circumstances. The client must trust the coach enough to risk new possibilities that threaten old habits connected to existing identities. A coach needs enough self-trust to encourage clients to make contact with new behaviors that bring up discomforting emotional responses. Being available to deal with the client's emotional response to discomfort is an important coaching competency. The coach needs to understand how to create enough safety for the client to invite new possibilities that *feel* risky to the client because those possibilities may have previously resided outside the client's repertoire. This safe risk-taking in the coach's presence, paradoxically, serves to energize the client for new actions for learning.

AWARENESS OF OUR IMPACT ON OTHERS: WHAT WE EVOKE AND PROVOKE

In exploring how to connect with others, it is useful to be aware of what we naturally evoke in others generally as well as to some particular audiences. What we evoke in others could be based on

our features (e.g., skin color, sex, age), our clothing (e.g., formal, high fashion or casual), our posture (e.g., how we walk or sit), and/or our non-verbal behavior (e.g., tics, smiles, frowns) and verbal behavior (e.g., deliberate speech or use of slang). Our physical appearance and verbal behaviors could remind clients of others they knew or know, or clients could be responding to conditioned responses to certain types or groups of people. We cannot control people's first and most natural response, but if we are aware of the clients' potential response, or become aware of their response, we can take action to address it. We find it useful to raise our clients' awareness of the responses they are likely to or have raised about certain groups or settings, and providing them with appropriate possible responses. Masterful coaches understand their range and familiarity across different contexts and the cultural codes attached to different groups and cultures (Rapaille, 2006). As coaches develop they need to build a requisite variety of varied uses of oneself in relation to different clients and contexts.

In our observations, Jeff evoked a sense of seriousness and aloofness when he entered a room of potential clients. Armed with this understanding, he was able to ground himself, center himself, and be sure he was fully present when he entered a new situation, smiling and feeling a bit "lighter." He experimented with meeting new people: calling them by name, introducing himself clearly, sharing stories about himself, and inquiring about them. Jeff found it useful to become aware of what he evoked in others, gained through both observation and from solicited feedback. He was able to experiment with different ways of being, and was able to positively impact the perceptions he created.

In addition to examining and investigating what clients evoke in us and in others, as well as what they themselves are experiencing, effective coaches focus on provoking or making something happen in coaching interactions. Through our presence, we hope to provide what may be missing for our clients. Paying attention to what Jeff evoked, we were positioned to share with him when we could feel he did not connect with us and challenge him to try new behaviors that would lead to connection. Coaches offer observations, questions, and new ideas that encourage their clients to consider possibilities for learning and change. Each offer is really an experiment guided by a stance of curiosity. Coaches are not attached to how things *should* be nor are they attached to the concept that there is only one way for the client to be in order to succeed. Hanafin (2004) proposes that "curiosity is an awareness agent competency" which compels attention to exploration. Paying attention to the other, while in the stance of an observer, allows us to see seemingly unrelated but relevant parts of the whole. As observers, coaches pay attention to what is most compelling, and from that point develop a hypothesis. Thus the intention of the intervener's working hypothesis matters.

Various interventions can be made with the aim of heightening clients' awareness of their own internal meaning-making process. Sharing an observation with the client, making a statement of interest, or asking probing and powerful questions—these actions can all be construed as *provocative*. Ed Nevis, a Gestalt historian and trusted mentor to many Gestalt practitioners, insists practitioners have to have both "fear and arrogance" when working to make something happen with clients: "fear" that we may not have what is needed, and "arrogance" that what we have to offer will be valuable to the client. The art of learning to use one's presence well (one's intentional use of self), is in intentionally aiming to provoke something that matters in the client (Nevis, 1987). So, if the client appears overly serious, can the coach provides levity and a humorous perspective? Can the coach recognize the issue that is most pertinent for the client's learning and intentionally, with permission, co-create powerful learning experiments?

AWARENESS OF CONTEXT: IDENTIFYING AND ALIGNING WHAT'S NEEDED AND WHAT'S OFFERED

In addition to paying attention to self and others, it is important to become aware of the context in which we are interacting by developing the skill of scanning the environment, noticing actions and patterns of behaviors and their impact and consequences. The cycle of experience is powerful for its range in application to the context and empowers the coach to be sensitive and attentively aware of the larger field that is so relevant for organizational based coaching. Cycle of Experience awareness processes for the context include scanning to see what figures are important to attend to out of the ground of so many figures, creating a distinct and compelling image out of multiple figures, determining when energy is sufficient for movement, attending to a change in boundaries when contact has been met and satisfied and most significantly, assessing the experience that has occurred. For example, Janet, our executive who had become fearful of meeting with her senior leadership team, found it useful to become aware that the colleague who questioned her initiative was operating in a declining business and experiencing downsizing and a loss of market share, whereas Janet was operating in an expanding business environment where investment and growth were on the upswing. Janet was supported by knowledge of global business conditions, and was able to begin her presentation by sharing her understanding of the larger context and how her proposed initiative would support developing new relationships and positively benefit the larger organization.

Systems theory and thinking has been strategically useful in focusing attention on the differing levels of system in which executive coaches operate. System theory and systems thinking keep us mindful of the interconnectedness of the component parts—whether they are individuals, pairs, groups, organizations cultures and societies (Carter & Hopper, 2004). Particularly useful

is the concept that a change in one part of the system impacts other parts of the system, even though that impact may not be immediately or overtly visible at the initial intervention level. Yet if we take a broader, more "aerial" perspective of the larger systemic picture, we can see more multiple connections and opportunities at multiple levels; we find it useful to occasionally take the metaphoric step to "the mountaintop" to help us become aware of these multiple impacts and opportunities. The more adept we become at noticing patterns at all levels, the more opportunities we find to experiment with small changes that may impact the larger context. Sometimes change is directly visible, but sometimes it is apparent only to peripheral vision, altering the meaning of the foreground. (Bateson, 1994, p. 6) Coaches benefit from knowing the level of system toward which they have a preference or predisposition, as they may use themselves more effectively out of a stronger sense of personal presence. The importance of being able to scan the larger context is particularly relevant to executive clients who are faced with the need to recognize threats and opportunities in their field. Often, we can detect what is happening in our field by paying attention to our personal cycle of experience and what we are scanning in our immediate environment. Again, this is the competency we model and teach our clients which assists them in meaning making of their immediate environmental challenges.

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The rate of change, which has become so intense, yields both fortunate and unfortunate high-impact random events—which Taleb (2007) calls "black swans". Such events can determine the course of history. For example, September 11, 2001, was a "black swan" that was both tragic and extreme in its impact. During the early 1980s, Johnson & Johnson faced company demise when there was deadly product tampering with its Tylenol product. It was a "black swan" that was met by awareness and commitment on the part of James Burke, then company CEO, who demanded total product recall. This action reinstated the customer trust and brought profit and positive future back to Johnson & Johnson. By being able to scan the environment and make meaning from such data, the coach's (or executive's) presence is a powerful witness to assist the client's consciousness. In their use of self, coaches can assist their clients to be present and make meaning to those high impact events that change the direction of all the levels of system. The black swans of change have increased and coaches need to be able to use themselves as awareness agents to support the client's response to the learning challenges embedded in such uncertainty. Our client Jeff, the partner of the consulting firm, also benefited from paying more attention to context. He came to recognize lack of agreement on roles within his firm's team when they were meeting with new clients. He could negotiate clearer definitions of role responsibilities. He was also able to see that, in addition to the technical expertise he and his team provided, clients were

The black swans of change have increased and coaches need to be able to use themselves as awareness agents to support the client's response to the learning challenges embedded in such uncertainty.

equally concerned about the relationships they would have with a prospective firm. With that in mind, he began to make building relationships a priority. He was realizing that relationships with clients influenced referrals and was a key determinant of Jeff's own success, as well as that of his firm and his team. Clearly, client organizations benefited as well from Jeff's new perspective.

In each of these cases, clients benefited from slowing down, becoming aware of a multi-level picture, and being able to focus on how their particular level or function "fit into" this larger organizational system. Clients were able to identify both what was needed in their immediate context and what was most important in the larger system in which their context functioned. By being more aware of what was paramount within the larger system, they were able to make small behavioral shifts to satisfy immediate needs in their own environment. Carter (2004, p. 16) has suggested that the picture of reality needs to be scanned for an "eye for what is critically missing from one's habitual pattern of meaning making". It is the task of the coach to assist the system in becoming aware of its alienated parts and it is the client's work, in embracing those parts, to notice what changes in their system.

Sometimes both coaches and clients miss the fact that the environment or organization is actually trying to support them, but their habitual behavioral responses prevent them from seeing and acknowledging such support.

A systemic perspective helps both coach and client realize that we are part of multiple systems, and that a change in behavior or function at one level can influence the entire system. Systems thinking encourages us to shuttle from the level at which intervention work is located to other levels that may also be affected. At the same time, when there is an issue at one level of system (for example, with an individual at the executive level), going to a different level of system to make the intervention might not yield successful outcome because the work needs to be at the correct level of system. Systems thinking and effective intervention are skills that require theory and practice, to provide effectiveness and to avoid system-level errors. Coaches must be present to their strength in system-level thinking and their ability to use themselves to scan the environment for what is missing, needed or obvious. These are the skills that we, in turn, teach our executive clients.

INTEGRATING WAYS OF AWARENESS

While attending to each focus of awareness—self, other, and context—we are also shifting our attention (ideally) among each of these areas in a dance-like fashion. Our client Janet, the head of an important business unit, shifted her attention to herself when she became anxious about a colleague's criticism, then shifted attention to the colleague who was questioning her, then shifted to the larger, organizational context. She momentarily lost her balance and remained focused on her own stress and insecurity; however, after a coaching session that assisted her focusing and presence practices, she was able to become more grounded and centered, and better able to shift between areas

of focus during her meeting with the top executives. Possessing the ability to recover from derailment experiences and become present is an important skill needed for coaches, executives and other professionals.

Coaches who are able to shift between levels and areas of focus with skillful handling are also able to support clients in desired goals when those goals reside in levels embedded in complex systems. Although we, as coaches, make these shifts in attention all the time, our focus may at times become skewed by inordinate attention to self, other, or context. Some of us fail to check in with the in-the-moment self assessment process connected to the cycle of experience, and become so focused on our own goals that we fail to energize clients into stepping forward themselves into self-awareness or organizational awareness. Similarly, sometimes coaches or clients focus so literally on "others" that they're unable to meet their own and/or family needs—never mind identified goals and/or division or organizational needs. Sometimes both coaches and clients miss the fact that the environment or organization is actually trying to support them, but their habitual behavioral responses prevent them from seeing and acknowledging such support.

The more capable coaches become in balancing attention and data regarding self, other, and context, and in maintaining

Table 3. Some Suggestions for Developing an Effective Coaching Presence

- Expose yourself to new ideas, people, and places to become more aware of your own possibilities and choices.
- Ask others for feedback about what you do and the impact this has on them.
- Pay attention to recurring patterns and issues and be open to exploring them. For example, if you continually find yourself regretting your commitments to people and activities, be curious about what happens, how it happens, and why it happens, under what (un-aware) circumstances.
- Practice being grateful, optimistic, and hopeful about life. Assume the "glass is half full." Both positive and negative emotions are contagious: far better for both yourself and others to exude a positive aura. Notice how you are identified, and work towards stronger support for more possibilities and choices.
- Become aware of your values and what is of primary importance to you, and reflect on how you are actualizing your values and priorities.
- Practice empathy and forgiveness for self and others.
- Assess your habits, and work on strengthening and developing new habits that support you and others.
- Engage in thoughtful reflection, and engage in behavioral experiments with a coach or colleagues.
- Create a personal, team, and organizational vision that is compelling; take actions to move towards those visions. Take risks and explore new actions and habits to support achievement of your visions.
- Interact respectfully with people who are different than you—in philosophy, age, culture, and experience; be willing to learn from them.
- Be open to others regarding your dreams and hopes, which builds support for self and other work.

presence (grounding, centering, checking-in, emotional self-awareness), the more they will be in a state of integrity that supports clients to become self-aware, to risk and learn, and to implement and take action on desired goals. The more coaches are in touch with what is important to themselves in relation to others (clients) and to the environment, the better they can support the intention of perceiving, identifying, and experimenting with and enacting opportunities and fulfilling potential. We expect great things from this vantage point of awareness and skill.

Developing presence and skillful use of self is the coach's lifelong project. Ongoing self-development allows more possibilities to emerge for ourselves, our clients, our relationships, and our communities. Awareness, learning, and action depend upon a conscious intention to be aware of self, others, and context. Commitment to emotional experiences is part of the learning experience. Making it a habit for 'in-the-moment assessment', and noting our patterns over time contribute to effective and impactful coach practice. Taking a few moments out of a busy day to physically relax, to note one's breathing, and to mentally reflect on what is of uppermost importance among all the competing figures, what is happening within us and around us, and how we are or are not responding—all of this nurtures our ability to coach other people. Attending to all aspects of well-being—whether physical, mental, spiritual, or communal health—is important for this is also the challenge for our clients, particularly those in the organizational arena. Paradoxically, the more we focus on our own self-aware development, the more we are able to pinpoint possibilities and alternative choices for ourselves, for our clients, for communities, and for our world. Our self-development is a life-long process ably guided by our curiosity about self, others, and context.

CONCLUSIONS

While being present is our natural state of being, and appears a natural "skill" of children, it takes conscious intention and effort to fully embrace that state of being and to use ourselves effectively in order to serve others in reaching their desired goals. In reviewing the practice of awareness, Bateson suggests that there is a spiritual basis to attention, a humility in waiting upon the emergence of a pattern from experience. The "willingness to assimilate what has been seen or heard draws other life into increasingly inclusive definitions of the self. Looking, listening and learning offer the modern equivalent of moving through life as a pilgrimage" (Bateson, 1994, p. 10). It is when we are present and aware of our senses that we can identify figures from the context regarding what is relevant for the future. We can be at choice regarding possibilities.

Presence requires that we are capable of attending to the personal, the group, the institutional and even the global so

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that we are able to offer generative observations to deep issues (Scharmer, 2008). When we have done the development work to support our integrated and strong presence, we experience ourselves as more connected to others and the environment; and we enjoy a sense of wholeness that is generative for self and others. Coaching is a satisfying and fulfilling process that requires knowledge, development and sustained practice. The theory behind an effective and a compelling presence suggests that lifelong development matters. What we in the organizational coaching practice are continually reminded of, simply, is that our presence is a catalyzing factor that inspires others to become aware, to learn, and to act with intent and purpose. In this time of accelerated change where the force of the "unknown unknowns" hurl relentlessly toward us, the coherent presence of a coach who works to offer an aware use of self can serve a client's mobilization of their creativity and adaptation to the black swans of change.

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CoachWorks® facilitates sustainable results in the areas of critical and current concern for top level clients. After years of industry experience, CoachWorks® International has a proven record in leadership development and helping clients realize solutions to the top issues concerning executives today. CoachWorks® provides a full range of coaching to every level of management, specializing in **C-Level Executives, Senior Management, Leadership Teams and Boards of Directors.** Coaching expertise and specialties include complex systems coaching, privately-held succession and transition coaching, and on-board coaching for executives with major new responsibilities.

Legacy Leadership® Resources and Training Services
CoachWorks® developed Legacy Leadership®, a comprehensive and highly adaptable leadership model to meet the growing needs of changing leadership in today's global community. A full range of resources are available for use organizationally and individually including coaching to the Legacy Leadership® model, training events, individual workbooks, hardcopy assessments and development plans, a full service online 360 feedback service and a wide range of associated support materials. Currently, Legacy Leadership® is available in several different formats including: **Legacy Leadership® - The Original Business Model, Legacy Leadership® for Educators, Legacy Leadership® for Community, Legacy Leadership® for Kids, Legacy Leadership® in French and Korean, and Legacy Leadership® Faith Version.** CoachWorks® has trained over 300 facilitators who deliver Legacy Leadership® training events, institutes, and seminars in corporate or organizational venues, as well as with individual coaching clients.

For more information about CoachWorks® services and training materials, call **214.585.8254** or visit our website at **www.CoachWorks.com** or **www.LegacyLeadership.com**

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WORKING RESOURCES
Dr. Maynard Brusman
Consulting Psychologist & Executive Coach
Trusted Advisor to Senior Leadership

Helping companies assess, select, coach and retain top talent

We Help Companies Assess, Select, Coach, and Retain Top Talent

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- **Do your hiring managers need help selecting and assessing high performing people who are a great fit with your company culture?**
- **Do you or your company's best and brightest need leadership coaching from an International Coach Federation certified coach focused on results?**
- **Are leaders derailing because they lack requisite emotional intelligence competencies?**

We provide strategic talent management programs including succession management, selection and assessment, and leadership development, helping organizations fill their leadership pipeline with emotionally intelligent leaders and win the "War for Talent".

Dr. Maynard Brusman Cited for Excellence

The Society for Advancement of Consulting (SAC) awarded two rare "Board Approved" designations for Dr. Maynard Brusman in the specialties of Executive/Leadership Coaching and Trusted Advisor to Law Firms and Attorneys. This signifies that Dr. Maynard Brusman has provided validated evidence from clients of exceptional performance in these areas of consulting, and that he has adhered to the ethics pledge of the organization, and has performed at this level for a prolonged period.

Dr. Maynard Brusman is the president of Working Resources and a consulting psychologist and executive/leadership coach with a practice in the San Francisco Financial District. Dr. Brusman may be contacted at (415) 546 -1252, mbrusman@workingresources.com or http://www.workingresources.com

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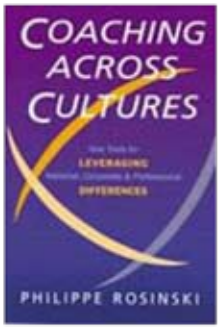
Philippe Rosinski is a leading authority in executive coaching, team coaching and global leadership development sought by leading international corporations.

He has pioneered a global approach to coaching that leverages multiple perspectives for greater creativity, impact and meaning. The Harvard Business School chose his groundbreaking book *Coaching Across Cultures* as its featured book recommendation in the category of business leadership. A Master of Science from Stanford University, he is also the first European to have been designated Master Certified Coach by the International Coach Federation.

Philippe is the principal of *Rosinski & Company*, a global consulting firm that helps leaders, teams and organizations unleash their human potential to achieve high performance together with high fulfillment.

To find out more about the **Coaching Across Cultures advanced executive coaching seminar** and to take the **Cultural Orientations Framework online assessment (free of charge)**, please visit www.philrosinski.com



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