

The Process of Reflective Coaching: Levels of Inquiry

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[Note: this coaching tool is adopted from an analysis of reflective coaching processes described in William Bergquist and Agnes Mura. *coachbook: A Guide to Organizational Coaching Strategies and Practices*. Available on amazon.com and Kindle.]

During the past twenty five years, increasing attention has been given the field of organizational consulting to the processes of reflective inquiry—initially championed by Donald Schön, his colleagues, Chris Argyris and Peter Senge. While reflective inquiry is often an unpredictable process—similar to improvisational jazz and theater in many respects—there are, still, a few reflective moves that have been found to be particularly effective when engaged in a coaching process. Specially, I propose that an effective reflective process often involves moving back and forth through seven specific levels of analysis. Each level offers a different perspective and a different reflective lens.

1. The reflective process often begins at Level One with the client reporting on their *Observation* of a specific event. The reflective coach will begin with a request: “Tell me what happened.” or “Tell me what you are seeing in this email.”
2. Given this initial observation (and the narrative or brief story accompanying this observation), a coach and client can begin moving toward Level Two: an examination of the *Data* that has been obtained. The coach asks: “What did you see that is relevant to your immediate concerns and interests?”
3. From here a coach and client can move to a Third Level, which is concerned with the *Meanings* that a client assigns to the Data that has been gathered. A relevant question is: “What does this mean for you?” or “How does this data relate to an important issue in your (work) life?”

4. Level Four involves the identification of and analysis of *Assumptions* that underlie the Meaning the person has assigned to the Data. The coach asks: “How do you know that your observation is accurate?” “How do you know that the meaning you assigned to this data is appropriate?” This will either help validate the assumptions the client made, or clarify any misperceptions he had formed or even lead to a total shift in perspective, if needed.
5. At Level Five, the coach is helping her client access some *Conclusions*. Several questions are often asked at this level: “What do you want to do about this situation?” “What can be done to address your concerns about what you have observed?”
6. These questions inevitably move the client and coach to Level Six, which is concerned with *Beliefs*. The coach asks: “Why do you think this decision is appropriate?” “What makes you think that taking this action in this situation will lead to success?” “How confident are you that this will be effective?”
7. Finally, at Level Seven, *Action* takes place, based on the Conclusions reached and the Beliefs that support these conclusions. In post-Actions reviews, the coach will be encouraging her client to reflect on the actions taken by asking: “What did you actually do?” “What occurred when you took this action?”

In subsequent sessions of reflective inquiry, a coach and client can now *reverse* the levels of analysis. As reflective coaches we begin with Level Seven and the post-*action* review questions already associated with this level: “What did you do?” and “What occurred when you took this action [what were the consequences]?” “What worked, what didn’t work, in your view?” We then return to Level Six and a focus on *Beliefs*. In encouraging our client to reflect at this level we now ask: “What does the way in which this action went (successful or unsuccessful) tell you about the world and about you in this world?” The Fifth Level is now concerned with how our client reached *Conclusions* with regard to the world he engages. A coach accesses this level when asking: “What have you learned from this action?”

At the Fourth Level, a coach now encourages her client to reexamine the *Assumptions* being made (based on the Conclusions reached). One of the questions that might be asked by the coach encourages a client to enter the Domain of Information: “How do you know you are accurate in your assessment of this action and its actual or potential impact?” Another question encourages the client to move into the

Domain of Intentions: “What was this action intended to accomplish?” Yet another question encourages movement into the Domain of Ideas: “Why do you think this was the appropriate action to take?” From here a coach and client can move back to the Third Level, which is concerned with the *Meanings* that a client assigns to the specific Assumption or set of Assumptions he has made that led ultimately to his Beliefs regarding outcomes and the Actions taken (and more immediately to the Conclusions reached). Relevant questions include: “How does an important issue in your life relate to the action you took?” and “What are you discovering/learning about the resolution of this important issue by virtue of the specific action path you took?”

The coach is now ready to assist her client in moving back to the first two levels. At Level Two, the client revisits the *Data* that has been collected—now with greater clarity regarding the lens through which he is gathering (and interpreting) this data. The coach will ask such questions as: “What do you now think are the most important facts to know about the situation you confronted?” “About what facts are you most confident and about what are you now less certain?” The reflective coach is not so much challenging the validity of her client’s data as encouraging her client to revisit his data analysis—and realize that there are other interpretations that might be entertained and other perspectives that might be taken when viewing the current situation. These alternative interpretations and perspective may, in turn, have led, eventually, to different decisions and a different course of action. Finally, at Level One, the coach encourages her client to reconsider the *Observation* he initially made. The coach now asks: “Tell me what you now think happened?” The reflective coach encourages her client to construct a new narrative, based on his journey up and down the levels of analysis.

The labels for each level and the key question(s) to be asked at each level can serve as a format for documenting the levels of reflection that are being engaged. The coach and client may either move from Level One toward Level Seven, or from Level Seven toward Level One—or (as we have proposed) from One to Seven and back again to One. The word “level” in no way is intended to imply that one form of inquiry is more “important” or more “advanced” than another form. It is the process of moving up and down the levels that is critical to the reflective process.

Donald Schön (1983) *The Reflective Practitioner*. New York: Basic Books.