

Guided Design: A Powerful Tool for Training Professional Coaches

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As educators and trainers we are all aware that it is often quite valuable to intersperse case studies in a program that is preparing people to enter the field of professional coaching. Most case studies, however, do not have a component built into the study that facilitates the direct integration of course content with the specific challenges being faced within the case study. A powerful tool called Guided Design does this integration for you.

Phase One-A

Originally used in the education of future engineers at West Virginia University (and subsequently modified by myself), Guided Design begins by offering the first written section of a brief case study. Members of one or more case study groups (each group consisting of no more than 5-7 participants) are invited to read, review and respond to this brief vignette. What would they do at this point? How would members of the study group respond to the initial challenge(s) being offered in this case study? In this particular use of Guided Design, the case study group would be asked to indicate how they would respond at this early stage to the coaching client.

Phase One-B

After each study group has offered their own response, the group is offered a second printed document which we call the *Collateral Response*. [By the way, I would suggest that you separate the several documents that are distributed during the Guided Design, so that participants aren't looking ahead to the next phase of the exercise.] This document might contain several different options—representing alternative responses to the first vignette (each of these responses representing one of the perspectives being offered about coaching in this educational or training program). In some instances, there might be only single Collateral Response if one specific strategy or perspective is being presented in this program. The key to Guided Design is not that the case study groups simply accept the Collateral Response. Rather members of the case study group are first to identify the strengths and advantages offered by the Collateral Response and the value inherent in each of the alternative perspectives (or this one alternative perspective) that underlie the Collateral Response. Second, the case study group is to indicate how *their own response* might be as good as or in some regards superior to the perspective(s) offered in the Collateral Response. In other words, the case study group is to

provide a rationale for their own decision, as well as appreciate the value(s) inherent in the Collateral Response.

This second analysis requires the case study group to engage in reflective practice and active learning—critical tools to be engaged in any coaching process. The case study group (or multiple groups) spends time discussing their reflective process and the leader of this education or training session offers her own reflections on the case study, the concepts and perspectives inherent in the Collateral Response (which they have usually prepared), and the responses offered by the case study group(s).

Phase Two-A

The case study does not stop here; rather, a second vignette is offered which moves the reflection forward. The second section of the case study begins with the assumption that the coach has engaged one of the responses represented in the Collateral Response and that the client has reacted to this response. Once again, the case study group is asked to indicate what their own response would be at this second phase. In addition, they reflect back on their previous discussion and determine how their previous considerations relate to (perhaps even predict) how the client has reacted during this second phase.

Phase Two-B

The case study group receives a second Collateral Response that introduces additional perspectives regarding the coaching process. Once again, the case study group identifies the strengths and rationale embedded in their own response, as well as the strengths inherent in the Collateral Response. The leader will then offer her own reflections and reintroduce concepts and perspectives from her education or training program. The subsequent discussion and dialogue among case study participants will grow even richer and there will be even more insightful engagement with the program concepts as related to this case study.

Phase Three and Beyond

Typically, the Guided Design involves at least three phases in which vignettes are offered and followed up by Collateral Responses. The number of phases is dependent on the time available (usually at least one hour for each phase) and the number of concepts and perspectives that are to be conveyed through the use of the Guided Design process.

Example of Guided Design Program

To illustrate the use of Guided Design in the educating and training of coaches, I have offered one of my own exercises. I introduce concepts from my own work on coaching (cf. Bergquist and Mura, 2011) and build the case study around a client (Susan Tremain) who is

hypothetical—yet based on several clients with whom I have worked over the past twenty years.

Please feel free to use these specific Guided Design materials, though I ask that you cite the source of these materials as me (Bill Berquist) and the Library of Professional Coaching. While you can certainly use these materials, I strongly recommend that you build your own Guided Design case study, making use of your own coaching experiences and your own concepts and perspectives regarding effective coaching practices.

Coaching Susan: A Guided Design Exercise

Phase One-A: Initial Case Study

Instructions: Please read the following brief case study.

Susan Tremain is an Assistant Vice President of the Human Resources Department at a large, international communications-focused corporation (to which we will give the name “Inter-Global Corp”). In her current job, Susan primarily focuses on overseeing and coordinating new training programs for Inter-Global. She has been very successful in providing leadership for diverse training programs throughout the world. As a result of this success, Susan has been assigned a challenging new project (for which she has been released ½ time from her current job). This new project concerns the preparation of a comprehensive human resource plan for the corporation. She has been asked to assemble and lead a task force composed of employees at multiple levels of the organization and from throughout the world. This task force (of no more than 15 people) is to address four primary questions:

- (1) What are the anticipated skills, knowledge and motivators for the coming decade in Inter-Global?
- (2) How might training and education best be managed given the international outreach of Inter-Global and the new technologies that are now (or soon will be) available for the delivery of this training and education?
- (3) Who should be providing this training and education (what is the appropriate balance between internal and external resources in Inter-Global)?
- (4) What can be done to insure that the training and education will have a lasting impact in Inter-Global?

Susan has long believed that senior leaders at Inter-Global can improve their performance and the quality of their decisions by engaging a professional coach. She has often assigned peer coaches to the participants in Inter-Global’s leadership development programs. Susan has also coordinated a program that leads to the identification and contracting of external coaches for senior executives at Inter-Global. She was thus perfectly positioned for a request on her own part for an external coach to assist her in preparing for and executing this challenging task force-based assignment.

Susan has just contacted you to determine if you would like to serve as her executive coach. The new task force would be the focus of this coaching engagement. She expects the assignment to be completed in six months and would like to contract with you for bi-weekly coaching sessions of 60 minute duration over this six month period—with one or two follow up sessions several months after completion of the assignment. She is offering excellent compensation for your work with her and she

indicates that she has full support from her own supervisor and other members of the Executive Team at Inter-Global. These leaders all believe that this is an important assignment and that Susan should receive the same kind of coaching assistance that she has been arranging (quite successfully) for members of the Executive Team.

What would be the focus of your first session with Susan?

Instructions: Please discuss this case study in your guided design group and come to a consensus (or at least limit to two alternative conclusions) regarding what you would do during your first session with Susan. Be prepared to summarize the actions would you take and share these with other guided design teams.

Phase One-B: Comparative Analysis

Instructions: Compare your proposed actions with each of the four options briefly described below (and those of other guided design teams, if there are any). Identify the strengths and weaknesses associated with each of the options described below (and with the actions generated by each of the other guided design teams if there are any). Also identify the specific strengths associated with your own proposed actions. In what ways are your own proposed actions as good as or perhaps better than any of the options listed below (or those generated by any other design teams)? Discuss in your guided design group (and with other guided design teams).

Option One

Gather more information from Susan (and perhaps other members of the organization) regarding: (1) past planning initiatives (keys to success or failure of these initiatives), (2) the kind of background (and styles) needed among task-force members, and (3) the specific expectations of the most powerful/influential/important members of Inter-Global's Executive Team regarding this project.

Option Two

Help Susan gain greater clarity regarding: (1) the specific outcomes expected of this task-force assignment, (2) the ways in which these outcomes can/will be assessed, (3) what "failure" would look like, and (4) what "spectacular success" would look like.

Option Three

Help Susan generate ideas about: (1) how the potential task-force members will be chosen (who selects and what are the criteria), (2) what will motivate these potential task-force members to get involved in this project, and (3) what type of structure will be set up (and what technology will be needed) to facilitate the operations of this task force?

Option Four

Work with Susan in formulating a clear coaching contract in which: (1) expectations for the coach are identified, (2) confidentiality and other important coaching norms are established, and (3) ways in which the coaching will take place and the nature/style of the coaching relationships will be established.

Phase Two-A: Two Months Later

Instructions: As in Phase One-A, please read the following addition to the case study of Susan and discuss in your guided design group.

The coaching is underway. Five one-hour sessions have been completed. Susan seems to be satisfied with the coaching sessions, but is definitely not satisfied with the task-force assignment. Susan has found this assignment to be very time-consuming. It is taking up virtually all of her time—not just the ½ time set aside by her boss and the Inter-Global Executive Team. She has to complete the second half of her job during the evening and on weekends. Her work/life balance is thrown off. She is ignoring her family and her own health. In addition, the task force meetings are often filled with conflict and poor communication. Task force members not only differ in terms their interpersonal styles, but also in terms of their cultural backgrounds (including differing values and perspectives, and differing command of English as the primary language being used during task-force meetings).

What should you do as Susan's coach?

Phase Two-B: Comparative Analysis

Instructions: As you did in Phase One-B, compare your proposed actions with those listed below (and those taken by other guided design teams). Identify the strengths and weaknesses associated with each of the options described below (and those offered by other guided designs). Once again, indicate the unique strengths associated with your own proposed action. Discuss in your guided design group (and with other guided design groups).

Option One

Focus with Susan on her performance as the facilitator of the task-force meetings. How can she effectively manage the conflict and make more constructive use of the differing styles and cultural perspectives manifest in the task-force meetings.

Option Two

Prepare Susan to confront her boss and members of the Inter-Global Executive Team about work-load and about access to additional resources (staff time, training, etc.)

Option Three

Confront Susan about the priorities she has established in her current life: Does this work make sense, given other priorities in her life? Where does she gain the most satisfaction? What have been the best moments in her work life since this assignment began?

Option Four

Assist Susan in determining if she should (and how she could) encourage other members of the task-force to “step up” and assume more responsibility for the work-load and for managing the conflicts and differing styles and cultures operating in the task force meeting.

Phase Three-A: Three Months Later

Instructions: As in Phase One-A and in Phase Two-A, please read the following addition to the case study of Susan and discuss in your guided design group.

The task force is working effectively and its members are assuming more responsibility for task force operations and for the resolution of conflicts that arise during task force meetings. Members of the task force seem to “own” the process and the task force outcomes. They are excited about preparing a final report for the Executive Team. A preliminary set of recommendations contained in a larger report (50 pages in length) is now being prepared and will be presented in written form and as an oral report to members of the Inter-Global Executive Team.

Susan has found your coaching sessions to be quite helpful. You have met every two weeks for one to two hours and have established an effective, trusting relationship. Susan credits you with making a real difference in terms of her effectiveness in working with the task force.

Susan is now concerned about how she can most effectively get this report and the preliminary recommendations made in the report to the Executive Team. How can she get the “buy-in” from key members of the Inter-Global Executive Team?

Phase Three-B: Comparative Analysis

Instructions: As you did in Phase One-B and Phase Two-B, compare your proposed actions with the options listed below (and those to be taken by other guided design teams). Identify the strengths and weaknesses associated with each of the options described below (and those proposed by other guided design teams). Once again, what strengths are associated with your own proposed action. Discuss in your guided design group (and with other guided design groups).

Option One

Encourage Susan to initiate a set of demonstration projects (pilot tests) that provide convincing evidence regarding the validity of recommendations made in this report.

Option Two

Encourage Susan and other task force members to seek out and analyze past incidents in Inter-Global's history when task force reports have been successfully presented and their recommendations implemented.

Option Three

Encourage Susan to seek out recommendations from Executive Team members as to what they would like to see in the written and oral report that could be convincing.

Option Four

Encourage Susan to assemble data from sources both inside and outside (benchmarking) Inter-Global that provide sufficient evidence to support recommendations contained in this report.

Option Five

Encourage Susan to have outsiders review a draft of the report (some of whom would eagerly support the recommendations being made and some who would be highly skeptical). Also set up a "dress rehearsal" during which Susan and some members of the task force enact their verbal presentation (along with technological supports) to the Executive Team, receiving constructive feedback from you (the coach), other members of the task force and several outsiders (who may or may not support the proposed recommendations).