

A Team Coaching Process for Complex Leadership Challenges

By Suzi Pomerantz and Bill Bergquist

Have you ever wanted to have in your toolbox a coaching methodology that would have high impact in the most complex and challenging of leadership scenarios? There is a wonderful integrative coaching tool for use when dealing with layered, nuanced complexity with multiple moving parts; in other words, business today!

The process we will discuss in this article is ideally suited for executives and executive teams, Boards, Venture Capitalists, any merger or acquisition, or multi-national/ global virtual organizations. It's been used successfully in non-profit situations as well as corporate, for-profit and public sector situations. This process was initially used in various symposia held by an organization [The International Consortium for Coaching in Organizations: ICCO] that no longer exists; however since we were both members of the Founding Board and Executive Committee we wanted to bring forward this coaching process that is part of the remaining legacy of ICCO.

The symposia created a wonderful format for learning, reflection and rich dialogue. Symposium presenters as well as participants were identified as learners and as active players on a supportive and collaborative field of critical and constructive inquiry. Half the group worked with one of the presenting leaders, co-coaching him in a powerful model we will detail below. The other half either met without a leader, or with a second leader if there was more than one presenter from that organization's senior leadership team, and they engaged collaboratively around action-plan, strategy, and consulting advice for solving the complex scenario presented. They provided recommendations to the case presenter based on the presentation, answers to their questions, and written material from the leader.

For the purposes of this article, we'll be focusing on the co-coaching model that was used, which one of the early executive leaders to enjoy the results of that process dubbed "Dream Team Coaching", since her experience with the impact of the format was as if she had her own Dream Team of coaches and champions in her corner. Following are the Roles, Format, and a few Case Examples to further explain the co-coaching process.

Roles and Format

Participants self-select and organize from among the following roles:

- 3 hand-picked senior coaches (mastery is important in co-coaching)
- 5 agents (could be more or less as situation dictates)
- 1 facilitator
- 1 recorder

The Dream Team meets with usually one client using this particular form of co-coaching. Ideally this process takes place in a conference room or around a table with 5 chairs, a whiteboard or pad of flipchart paper, and markers. The client is seated at the head of the table in the client chair.

Three coaches each take a coaching chair and build on one another's comments as if they were one coach. The coaches do not compete, cut each other off, speak over each other, or seek to dominate the flow of the conversation; rather they collaborate in a generative and integrative approach. In addition, one chair can be left empty for other people in the room (agents, observers) to take a seat and engage in the conversation as they see fit. A facilitator to direct traffic and a recorder to keep track of major themes and questions round out the cast. In effect, the client is being coached by up to a dozen people, but in a focused manner.

Coaches engage in a collaborative effort, co-creating and engaging with questions and working together to create clarity for the client. A mark of success is when the coaches blend effectively, really listening to each other and mindfully interpreting how to dance together in service of the client's agenda. Ideas start to bubble up for the entire team and the role of the coaches shifts from clarifying to focusing the client while holding complex and multiple threads of client thought and strategy in partnership with the client and each other.

Agents add other dimensions and perspectives that expand the thinking as the conversation evolves, perhaps observing the process and assisting with the creation of what coaching questions to ask, or advocating on behalf of the client regarding their own areas of expertise or any specific, assigned issues for each agent—for example, Return-on-Investment (ROI), or another particular focus area of importance to the client.

Case Examples

To give you a better idea of this, several case examples illustrate the process. These were created after the ICCO Symposium in 2006, which brought together a limited number of organizational representatives, executive coaches, researchers, and trainers—just 25 in all—to explore questions for real cases in real time. Our colleagues John Lazar and Linda Page provided the initial documentation of these case examples. Here are the stories.

Case Exploration One: One-on-one coaching is already embedded in this consulting firm. Where does it go from here?

“Jake” is an experienced Human Resources Executive who was assigned the coaching portfolio just eighteen months ago. Now that he has mastered the day-to-day operations that match some 70 to 80 partners each year with 45 external coaches, he is ready to ask more strategic questions. “How can I pilot or explore other models than one partner, one coach, in the room?” Jake asks. “How do we touch 3400 partners not touched by the present model of coaching? I worry that our approach is not particularly fresh. What else should I be thinking about that can keep executive coaching fresh, leverageable in terms of cost, effective in terms of reaching more people?”

Jake was not satisfied by a general discussion, with coaches in the room saying how they would approach these issues, or with organizational representatives, some from very different industries, sharing their experiences. While this discussion was informative, Jake wanted more. “Aren't there cutting edge models out there that would put us on the curve? I do telephone debriefs with the partners who have been coached, and I often hear a bit of a choking voice when people talk about the results of their coaching. So we've got something that works, but I want to extend it. I want something fresh. I guess I'm starting with a 'glass half empty' attitude.”

Co-Coaching plus Empty Chair: The standard format was engaged. The attendees divided in half, a

dozen people meeting with Jake to engage in the co-coaching. Jake sat in the client chair. Three coaches agreed to each take a coaching chair and to build on one another's comments as if they were one coach and one chair was left empty for other people to participate.

The questions were indeed what might be expected from a single coach, but coordinated input from three ongoing coaches and any of the rest of the participants who took the empty chair made for rich, deep, and rapid exploration of possibilities. Here is a selected sequence of questions:

- What is your vision for what is possible?
- What benefits would you like to see?
- Why now?
- What works well?
- Could we start dreaming?

Impact and Outcomes: Of several “dreams” offered by various participants including Jake, one evolved into a model of leadership training for a group of 10 or so partners around a theme that they chose, so that they would be engaged in developing their own knowledge and skills. This could have the cost benefit of using in-house staff for facilitation, as confidentiality requirements would change. This would also have the advantage of developing the group's coaching skills in order to extend a coaching culture throughout the organization. “I promise you that you'll still get the choking voice,” said one coach.

“That could be put into the category of group coaching,” said Jake, “But it has a lot more meat. That's what I've wanted.” In evaluating the experience, Jake said, “This was just outstanding. I didn't think I was going to get this much good stuff.” One participant responded, “Sounds like your glass is half full.”

Action Item: Stick with what works—one-on-one coaching—but consider tapping into the need for generativity for coachees. A group model, where they “pay forward” to peers and the organization, may capture their engagement and release their creativity in ways that impact the whole organization.

Case Exploration Two: Coaching has been proven effective, but is not yet embedded. How does this coach extend the reach of coaching without over-extending herself?

“Danielle” is also with a large global consulting firm, a partnership that has recently gone public. Coaching is viewed in the firm as what we would call ‘mentoring’: either ‘a senior person transferring skills and knowledge to a junior person’, or ‘giving corrective feedback.’ Her vision is to transform the culture through coaching and a coach-approach to business. Danielle has garnered senior executive support for providing individual coaching services to senior executives (partners) who were selected for a pilot executive coaching program, as well as group workshops with leadership development training for the top tier of high potential executives throughout the organization worldwide.

Danielle's goal is to become 'head coach' for the firm—tying together multiple, disparate coaching initiatives under one umbrella with a standard set of operating principles and a consistent philosophy.

Two years ago, Danielle founded a Coaching Community of Practice (CoP) to identify and mentor internal coaches/coaches-in-training. The Coaching CoP created coaching standards, best practices, a program design and development toolkit, and coach selection criteria. Despite the retirement of the business unit managing partner who sponsored the original coaching pilot, Danielle continued the coaching program for nearly two years past the sponsor's retirement. Danielle had gathered ROI data which demonstrated bottom line impact of the senior executive coaching program.

Business unit leaders from throughout the firm provided substantial support, and the coaching work received exceptional ratings (average score of 5 out of 5 across quantitative measures of individual coaching, workshop ratings averaging 9.8 across a 10-point scale, and a 10% higher sales win rate among coached partners versus non-coached peers). ROI data were compelling enough that, in an unprecedented move, the global HR lead for the business unit created a headcount for Danielle. Over the previous year, Danielle had conducted group sessions throughout the organization, leveraging a consistent coaching model and philosophy. Her next move was to tie together these coaching initiatives under one global, firm-wide coaching umbrella, expanding her global business unit role to reach across all business units firm-wide.

Danielle also came to the group with a specific set of concerns, including how to shift the already understood definition of coaching and how to expand the firm's professional coaching services as a means to create a coaching culture. She posed to the larger group two specific questions: How to answer business issues of the scalability, affordability, quality, and consistency of coaching? And, to garner sponsorship and support, what research argues that culture change through a coach-approach produces an acceptable ROI?

Co-Coaching plus Empty Chair: The remaining half of the Symposium participants adopted the same model as with Jake's group. Danielle was the client, three coaches took chairs 1-3, and the fourth chair was left for any of the remaining participants to step in as they saw an opportunity. Again, this model brought a rich variety of experiences and skills to bear in a focused, time-limited form.

Through a series of questions, Danielle reframed and refined her ideas about how to create a coaching organization and address critical business needs. Her co-coaching team supported her in identifying the following leadership imperatives:

- Create an alliance with the CFO, and specifically make empirical links between coaching, employee engagement, organizational performance, and financial benefit.
- Address the internal resistance to coaching either directly or indirectly through making the coaching momentum irresistible in the organization.
- Push for new role as 'Chief Engagement Officer' to indicate impact of coaching on a key business metric (employee engagement)
- Rally senior executive coachees and sponsors of group sessions to be vocal supporters of the vision.

Impact and Outcomes: Danielle commented, "This was amazing. It was incredibly powerful to have my vision witnessed here. I had been so engrossed and passionate about pursuing my vision, I had not fully appreciated the expansiveness of it until hearing it reflected back by these respected colleagues."

- While there have been several well-cited ROI studies of the value of individual coaching (See *International Journal for Coaching in Organizations*), the group were unable to point to ROI data that addressed Danielle's culture change question. Thus, future research must focus on this area.
- This group coaching approach, which leverages the best of all that coaching offers, is particularly valuable when addressing a complex situation, such as Danielle's vision of transforming a large, global, old-school culture; or when one is taking on a new role as president of a large organization or operating as a chief officer during a large-scale merger or acquisition.
- One unexpected outcome surprised not only Danielle, but the entire group. The coaching group caught the vision and the possibility of what could be created, and voluntarily committed to

work with Danielle past the end of the ICCO Symposium. “While I expected the [symposium] group to dissolve once I announced my departure from the firm (two weeks after the Symposium), instead they unanimously offered to stand with me for as long as the process was working and I was willing to be a ‘guinea pig’ in the experiment. As a result, not only have I received exceptional coaching, we are documenting the experience and considering the creation of a new offering based on the model.”

Action Items: In an unexpected turn, due to major upcoming organizational changes which required significant trade-offs, the decision was made to discontinue the investment in internal coaching. Doing business as a global, publicly traded company requires making hard decisions in order to keep the business strong on a quarterly basis. While no coaching program is immune to elimination, two moves would help reduce the likelihood of this scenario:

- Where possible, ensure headcount for coaching sits in the business unit where coaching is delivered and ROI is being experienced, rather than in an operational function such as HR;
- Concurrently address issues of scalability, affordability, consistency, and quality. Most coaching programs can address three of these four elements. Large-scale coaching efforts must address and optimize all four.

Case Exploration Three: The stated objective of this successful resource-based company is to move from command-and-control to visionary team, or distributed leadership. What is necessary to make this move successful and sustainable?

“Marcia” is an experienced leadership coach who was brought into the company five years ago in order to make leadership training “stick.” The Founder of the company was a dynamic visionary who was also a top-down controller. He died three years ago, and the new CEO, a family member, is dedicated to carrying on initiatives to establish a more team-oriented approach and to change managers’ language from “my” to “our.” Despite the new CEO’s being steeped in deliver-now, black-and-white thinking from the past, employees know that she is committed to having an effective company where people want to work. Marcia was involved in two pilot projects with teams of managers.

The first had a rich educational component, but performance goals were set from above. In the second pilot, the educational component was reduced to allow the teams to set their own goals. Performance increases were higher after the second pilot. Marcia has insisted on having designated sponsors in the company, and she can rely on an Executive VP who owns the business results as well as a Human Resources VP to work with her on the people side. As she gleans lessons from the pilot projects and looks toward an organization-wide implementation, Marcia asks, “What could be done to increase the probability of sustained enhanced results?”

Small Group Brainstorming: The 25 participants divided into three smaller groups, each generating recommendations and reporting these to the full group. Below is a summary of these recommendations:

- Some resistance was generated by what was perceived by the pilot teams as a disconnect between what is espoused and what is practiced. Thus, the culture change must start at the top with a strategic leadership conversation about why the change matters, what are the shared values and the vision at each level, what common language can express this vision, and how accountability can become a positive.
- This conversation will be enhanced by the development of teams through team coaching. The fact that team building typically takes two to three years requires a level of persistence that will

be enabled by the ongoing strategic leadership conversation above.

- The resources to support these initiatives must be marshaled, from synthesizing a compelling story for the CEO to engaging the HR system in designing a reward structure for being a team.

Impact and Outcomes: In evaluating this experience, Marcia said “First, I heard a validation of multiple conversations I have had. Second, I realize that I am the only consistent coaching presence in this firm, so I am responsible for bringing in the lessons from the past. Third, I haven’t until now recognized the resources and time necessary to pull off something like this.”

Action Item: No matter how much experience you may have with coaching for organizational change, use other coaches or organizational leaders to confirm and/or freshen your approach.

Conclusions

We remember fondly the symposia held by ICCO. It can truly be a memorable and productive event when a group of professionals convene for robust dialogue about the effectiveness and improvement of coaching in organizations, specifically organized around the real, complex, multi-layered challenges of organizational leaders. What a gift it was to participate in these symposia—with case studies of current, real-time organizational issues or dynamics being presented to the group by the actual senior leaders of that organization and with participants in the symposium tackling it from both a consulting and a coaching point of view. These sessions were always dynamic, powerful, transformational, and meaningful. They often created sustainable impact for the organizations presenting. Most importantly, this “dream team” model is still viable and can be enacted by any leadership team, coaching or consulting group, or organization such as ICCO which is committed to the further development of leaders and their organizations.