CURATED2017

10TH ANNIVERSARY

LIBRARY OF PROFESSIONAL COACHING

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Can you BELIEVE we are 10 years old?

Yep, it was March of 2007 that we created the Library of Professional Coaching and we have been seeking a meaningful and special way to celebrate our 10th anniversary! Thus, we'd like to take this opportunity to unveil to you our inspirational and aspirational concept of the Banyan Tree of Knowledge and Wisdom, and the Banian People who gathered there!

The Library of Professional Coaching provides a setting for collaboration among members of the professional coaching community —much as traders from around the world (the Banians) met for many centuries beneath the spreading branches of the Banyan Tree to exchange ideas and build sustaining networks.

Branches of the Banyan Tree reach both outward and downward, creating new roots that enable the tree to spread outward with increased stability against the winds.

In much the same way, our Library of Professional Coaching—celebrating its 10th year of service–assists in establishing a strong coaching community founded on evidence and dialogue. It is a community that remains viable despite the often strong and shifting winds of change faced by our coaching clients and the threatening winds of political, socio-economic and cultural unrest that swirl throughout our contemporary world.

We tip our hats to you, coaches! For all that you do to help your clients REACH new horizons!

We are excited to bring you this CURATED2017 publication to celebrate the ten years of amazing articles you've submitted to the Library.

This book is divided into sections:

> **Section One: Ten Years of the Library**, where we have 10 articles, the best one from each year. These articles illustrate the diversity of offerings in the library—in terms of both length and focus (from coaching theory and research to practical coaching tips).
>
> **Section Two: The Future of Coaching**, which brings you a sample article from each of the first 12 issues of this digital magazine (which is embedded in the library). We have included the introduction to each issue which provides a listing of all essays include in this issue. We invite you to view the upcoming quarterly issues of this digital magazine (to be found along with our other digital magazines by clicking on "Magazine" in the navigation bar located near the top of the library home page).

Please feel free to share this collection of materials with anyone you know who would be interested, and be sure to let everyone know there's over 800 articles available at https://libraryofprofessionalcoaching.com/ for free! We are proud to report over 300,000 hits on documents in our library, with visitors coming from more than 50 countries in the world. We expect to soon offer more than 1,000 documents and welcome our 400,000th hit.

We couldn't continue to bring you the Library for free without the help of our sponsors, benefactors, and patrons. You can find out more about them throughout this book! We are grateful for all the support that has sustained this Library for ten years and counting. Thank you!

Your Curators,

Bill Bergquist and Suzi Pomerantz

Created, Edited and Published by:

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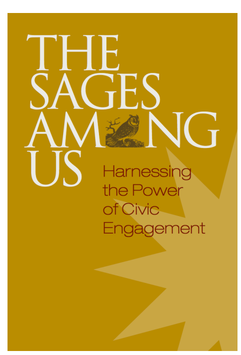

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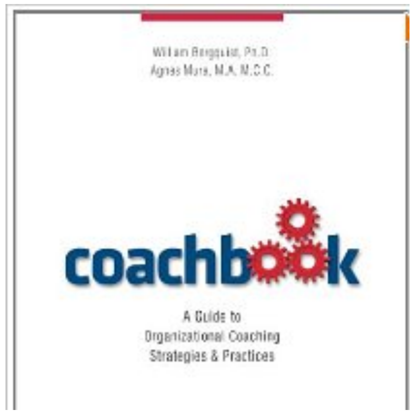

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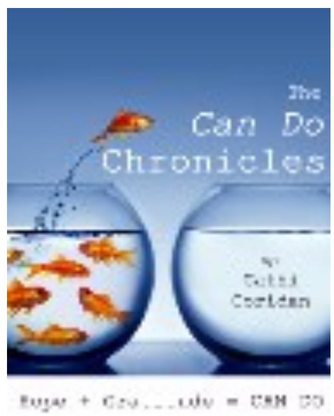

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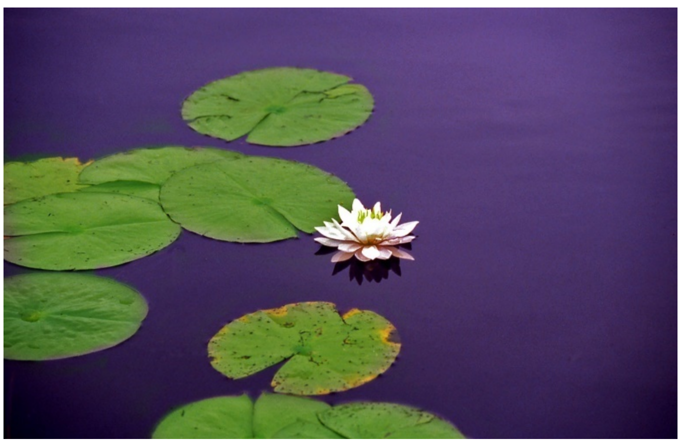
SECTION ONE: TEN YEARS OF THE LIBRARY

2007

Powerful Conversations Generate Powerful Results

By Suzi Pomerantz, MT., MCC.

Do you know how to consciously create conversations that are powerful? Having powerful conversations is a key to producing extraordinary results. Your ability to have a powerful conversation demonstrates that you are committed to having a powerful relationship. Extraordinary results are a function of extraordinary relationships.



Extraordinary results occur when you expand your ability to listen beyond what is merely being spoken and are able to communicate such that people are left inspired to take action.

Powerful conversations lead to:

- Building Trust
- Engaging in healthy conflict

- Expressing your commitment
- Being accountable and holding others accountable
- Attention to results
- Focus on impact
- Generating powerful results

Most of the time at work and in our personal lives we both consciously and unconsciously avoid having the conversations that will get us the results we want. Why do we avoid having conversations with each other? We avoid having conversations because we are paying more attention to our concerns or feelings rather than to the commitment we have for the relationship. When we are interested more in our own experience than that of the other person, we become self-conscious, self-focused, and ineffective. When we are working to get the words right, to sound sincere, to sound knowledgeable, to come across in a particular way, then we are focused more on being interesting than being interested. The secret to success in powerful conversations as well as powerful relationships lies in our ability to be more interested in the experience of the other person than in ourselves.

When you are paying attention to yourself, your experience, your output, your impact, we call that ***being interesting*** versus ***being interested*** (or paying attention to the other person).

Access to powerful and effective conversations comes from understanding of and mastery in dialogue.

What is dialogue?

Real dialogue occurs when two or more people engage in a conversation where mutual sharing of ideas occur. The opposite of dialogue is monologue.

Monologue is that little voice in your head, self-talk, often referred to as noise or the gremlin. Often people communicate the monologue out loud (you know the type) and this type of communication rarely includes the mutual sharing of ideas. It does however include opinion, assessments and judgments, evaluations and concerns. The monologue- deliverer believes that his thoughts are true, and that everyone else needs to benefit from his truth.

Rarely are we able to communicate our concerns, particularly when they are hidden concerns. Hidden concerns are a function of our assessing that something is unsafe, or a fear that something is going to happen that will cause an upset or create suffering in ourselves or the other person. Sometimes we just opt out of the dialogue in order to avoid confronting our own hidden concerns.

So how do you stay in dialogue?

Communicate your concern. Talk about what you **think will happen** if you actually communicate what you are about to say.

By communicating your concern first, you **create context** for what you want to really communicate.

The key here is to ask yourself: "Is there a conversation I need to have before I have the conversation I really want to have?"…and then communicate that.

Some common pre-conversations include:

- A conversation to create the opportunity to have a conversation (scheduling it)
- A conversation to express concerns or doubts or fears about raising that topic
- A conversation about how you'd like the other person to listen to you or to hear what you are about to say

- A conversation about what you need from the other person in order to feel safe to have the conversation
- A conversation about what is important to you and why it is important to you to have the conversation you are about to have
- A conversation to determine if you and the other person are ready, open, prepared to have the conversation you want to have

If you do not distinguish and articulate that it is unsafe for you by communicating your concern you will do one of the following:

- Withdraw from the conversation
- Avoid the conversation
- Mask the conversation

All of which lead to silence.

Or, you will do one of these things:

- Control the conversation
- Label someone or something in the conversation
- Attack someone or something during the

conversation This leads to some form of VIOLENCE.

Chances are you've experienced some of this already. Does it sound familiar? What is your particular pattern?

In order to stay in dialogue, remember to be interested verses being interesting. Get interested in what the other person has to say. You can authentically get interested in discovering why the person is communicating what they are communicating. Get genuinely interested in discovering why they are upset or how to resolve an issue they have with you. Do what it takes to get interested in creating a powerful relationship by generating a powerful conversation through authentic dialogue. You will know if you are having a powerful conversation if the other person is sharing openly and honestly their concerns, feedback, upset, issues, challenges, ideas, etc. and you are truly interested in what they have to say.

Generally speaking, we tend to be mostly aware of our own intentions and the impact the other person is having on us. We are not usually aware of the other person's intentions or our own impact on that other person. Shifting our awareness and asking questions that allow us to glimpse insights into the things we are typically unaware of in a conversation will allow us greater reach towards powerful conversations.

Conversational Intentions and Impact

Aware Of	**Unaware Of**
My intentions	Other person's intentions
Other person's impact on me	My impact on other person

Some examples of intentions that move you away from dialogue:

- When I feel hurt or worried I will turn to silence or give cheap shots

- When I don't trust people I will control the conversation to go my way

- My boss thinks I am too emotional (little voice in head) so I will keep to myself and work harder to prove him wrong

- They are so demanding. I'll show them whose boss.

Some examples of intentions that move you towards dialogue

- I will tell them when I feel hurt or worried and find out how they feel also

- I will tell Joe that I do not trust him to complete that project and find out how I can support him so he can complete the project. I will also tell him that I am committed to having a trusting relationship.

- I will tell my boss that I am afraid to speak my mind around him because I think it will jeopardize my job.

Think about:

Can you think of a pressing issue that you know needs to be addressed but you have been avoiding speaking about it?

What concerns do you have around bringing up this issue? (Example: Every time I try to talk about it, it doesn't come out right so I end up saying nothing).

What conversation would you like to have (or know someone else should have) but you are avoiding having that conversation with one of your team members or someone else at work?

See if you can distinguish your concerns. (Example: I have a concern that I will be too controlling and will end up looking bad in front of my peers)

"Anything that you are unwilling to communicate creates waste in an organization."

-Sandor Kovacs

The conversations that you choose to avoid never go away and often show up in the results that you produce/ don't produce.

Unwillingness to communicate the issues that you feel are important will eventually create distrust and resignation in a team and it will show by your results.

Avoiding conflict leads to distrust.

Powerful Conversations: The Shift Required

The table below details a few of the shifts in thinking and understanding required to create powerful conversations. Which are most relevant to you?

Shift From		**Shift To**
Certainty (I know and Understand)	➔	Curiosity (Help me Understand. What do they know that I do not know?)
I know the Truth	➔	We all have different stories and interpretations

Assuming bad intentions	➔	Assuming good intentions or sharing your interpretation of bad intentions
They are to blame (it's their fault)	➔	What's my role in this? (What did we both contribute to create this situation?)
What's wrong with you?	➔	What is going on for you, what's your experience?
Persuading to get your way	➔	Looking to understand their point of view
I'm right, you're wrong	➔	Honor each other's interpretation
Listening to yourself (For what you are going to say next)	➔	Listening to them (For mutual understanding)
Questioning to prove something	➔	Questioning to illuminate new options

Your ability to generate dialogue from a powerful place, stay in that dialogue, and focus on the other person will guide you in creating powerful results from powerful conversations.

2008

Moral Development and Integral Coaching

Lloyd Raines

(excerpted from "Integral Leadership Coaching: A Partner in Sustainability" by Lloyd Raines, published March 2007, Integral Leadership Review.)

How do coaches explore the moral dimensions of leadership without passing judgment in the process? How might we engage in inquiry in ways that stimulate careful reflection on the leader's and organization's impact on others and nature? We do this carefully and courageously. Moral development is a dialogue of exploration that requires looking truthfully at the short-term, intermediate, and long-term positive obligations that go with positions of authority. How can we do that?

As mentioned earlier, coaching always starts with where a client is, presently, and develops from there. The coaching might initially start in the cognitive domain, yet quickly move toward explorations of the body, emotions, and spirit—noticing how one dimension relates to the other.

Three Stages of Development

This entire process moves developmentally towards maturity, in moral and spiritual terms, through three basic stages, according to Carol Gilligan (1982). At the first stage, we encounter behavior that is self-interested and selfish. This looks out for Number One, regardless of what it means for others. I am the center of the universe, and I act accordingly. There is an experience of “me and the rest of the world.

The second stage encounters behavior that expresses care. When our circle of concern expands, we see our self-interest as being directly tied up with the self-interests of others in our close-in tribes (based on some particular likeness, belief, or affiliation). These tribes have an insular feel, with members acting one way with other tribal members, and another with those not of the tribe. There is an “our and they or “insiders and outsiders” experience.

At the third stage, we experience the interconnectedness of people everywhere and our connection to nature. This interconnectedness is expressed by behaviors that act from a sense of universal care. At the third stage, the entire global community and ecology are experienced in an “I-Thou relationship. There exists an inclusive “we” experience. This third moral stage acknowledges and behaves as if people anywhere are part of one tribe, inseparable, where we experience the joys and suffering of others as closely akin to our own. And the universal tribe acts willingly and willfully from a reverence for the beauty and bounty of nature and the dignity and common longings of the global human community.

Achieving a higher stage of moral development is not permanent, however. When under duress, stress, conflicts of interest, the intoxication of privilege or power (in service to self-interest), or the desperation of powerlessness and alienation, anyone can fall from a higher moral stage to lower ones—sometimes dropping two moral stages in Gilligan’s taxonomy.

Each of these three stages, in a way, also has to do with harnessing intelligence. The first stage, selfishness, harnesses the individual’s intelligence to serve the interests of the individual. The second stage, care, is for harnessing the collective intelligence of one’s close-in tribes for the care of those tribes. And finally, the third stage, global care, involves the full-fledged harnessing of the collective intelligence of the human community to benefit the whole community, including those least well off and those who are the least powerful.

As leadership coaches, we can choose to bear witness for the well-being of the global community through our listening, distinctions, questions, and provocations. We can choose to take part in conversations with powerful leaders, with the dispossessed and those without voice or power – sitting invisibly on our shoulders, listening with us, wondering if , how, and when we coaches will speak for the dignity of their spirits, and ask questions that honor their predicaments.

What the integral framework provides for leadership coaches and leadership coaching is a way to see the wholeness of the playing field we enter every time we engage in coaching. By holding a framework of wholeness, we can be more attentive, careful, and caring about what we listen for and inquire about with leaders. It enables us to have a balanced awareness and approach to supporting the personal flourishing of a leader in service to the responsibilities and opportunities that accompany their position. Connecting the interior landscape with the exterior reality becomes the muse.

In one of the Hindu sacred texts, the Mahabharata, the warrior Arjuna pauses to confer with Lord Krishna before beginning armed battle. In his spiritual confusion, he confesses to Krishna, □I’m torn because I don’t know whether the real battle is on the field or in my heart, □ to which Krishna responds, □I can see no difference. A partially cultivated heart renders, at most, partially cultivated eyes for discerning the truth and knowing how to respond from the wisdom of the heart-mind instead of lower order instincts.

Engaging Oneself

What orientation might coaches embody to partner in the cultivation of wisdom in leaders? The good news is that many diverse approaches to leadership coaching work. I continue to be moved and amazed at the multitude of ways that coaching evokes transformation in leaders. It’s as if there are so many ports of entry for that catalysis, and the desire and hunger are so strong on the part of clients, that touching any one dimension of that longing throws open big doors and windows, cascading into many smaller shifts that result in a qualitative shift. It’s beautiful to behold.

Based on my own experience, I also know that I am able to coach only to the limit of my own understanding and experience. To that degree, I am called to continually study, experiment, and grow as an experienced integral leadership coach, improving in the ways I am able to hold active focus on the interplay between the leader’s interior and his or her behaviors (performance and outcomes), the surrounding culture/s (organizationally and beyond), and systems (organizational, social, ecological). That’s a rich, holistic awareness.

Each of these dimensions is synergistically alive in the other, engaged in an on-going exchange of subtle energies. Each approach holds within it the seeds of the other, and when consciously aligned has a multiplier effect, enhancing the potential for a greater capacity in four areas understood as one whole “ecological” system (living within others). From a distance, as the astronaut flies, we can see and begin to grasp life within one natural biosphere populated by endless systems within systems. Our challenge now is to act as if we understand that we are one interdependent biosphere.

2009

Authentic Marketing vs. Self-Promotion

Paulette Rao, MCC

Many people are turned off by marketing because they see it as self-serving advertising aimed at taking money from people. I've seen loads of this type of shameless, self-promotion out there, and it's a turn off. Of course, you wouldn't want to be known as that type of self-promoter.

The conundrum is that, as an entrepreneur, you have to get your message out there in a big way and, as a coach, you want to live on purpose. You want to grab attention without being pushy, and make sincere promises to deliver that don't violate your integrity. Without applying pressure, you want to inspire clients to take the action you know they need to take. And without using a gimmick, you want to appeal to a sense of urgency. You want to attract the attention of the people who need you and let them know that you're the answer to their prayers. And you need to communicate full-out so that those people can find you! Otherwise, you're a well-kept secret!

So how do you put it out there in a way that feels aligned with your values--where you feel genuine and filled with integrity?

Authentic Marketing

The answer is to market authentically, to learn how to communicate in a clear, sincere, and compelling way. Marketing shouldn't be slinging sales talk at someone or getting on a soapbox. Authentic marketing is having a real conversation that speaks to someone's needs. Its genesis is in uncovering your passion, finding its voice and allowing it to be heard. It's a dialogue that flows from the inside out.

To uncover your passion, you need to reconnect to your vision—why you started your business in the first place. When you do that, you'll clear the mental cobwebs and connect back to what has always been there but got mucked over by those voices that play in your head. Tapes like "I'm not a sales type. I don't have the personality for it." "I don't want to be intrusive." "I don't like to talk about myself." "I'm embarrassed that people might think I need money."

People are attracted when you speak from your passion. When you are in touch with your gift, your energy shifts and a meaningful, natural conversation can open. You speak in ways that illumine opportunities; that make space for transformation. You share your belief in the person's ability to change and invite that person to try on a new way of thinking and being. When your agenda is pure, others are attracted to your clear and obvious commitment to help them create change.

When you re-connect to your love of facilitating positive change for others, your marketing will be transformed because *you* have been transformed from salesperson into instrument of change.

You then become fearless about speaking about the solutions you bring forward. You find this space within you where marketing is no longer a drag. It's exhilarating; in fact, it's feels a lot like falling in love with your gift, again, and enrolling others in *that feeling*. Remember the first day of coach training? How in love you felt with this way of being in the world? What could be more powerful and satisfying?

To market authentically to those we want to serve means that we communicate and show up in ways that respect their sensibilities, speak to their intelligence, and honor their ability to discern for themselves what they will buy.

What does your messaging convey?

Does your heart and purpose shine through your words and way of being?

What will it take for you to shift your marketing messages from promotion to authentic contribution?

2010

Decision Theory in Complex Systems

By

John Bush

Human beings are continuously making conscious decisions. Life is a stream of decisions made on a continuum from the subconscious to the fully involved conscious state. Many decisions are made "without thinking" as when we have driven our car to a destination and realize that we were not aware of the actions we were taking to maneuver the automobile. Many decisions made during an individual's typical day are made in a distracted state. This process works well until some external event injects itself into the process; for instance, a pedestrian walking out in front of the car. For this reason, airplane pilots are constantly admonished to never lapse into a distracted mode while flying their airplane. The consequences of dealing with an injected event can be catastrophic.

A smaller number of decisions made on a daily basis require a higher focus of attention. Should I schedule a dental appointment; what shall I make for dinner; what shall I read; should I call my mother? Decisions such as these require conscious effort, but the consequences of the decision are typically not of great import.

A small number of economic decisions require research, analysis and focused consciousness. The consequences of not deciding well can be severe. Should I buy this house; what stocks and bonds should I purchase;

what should be my retirement strategy? The decision process for questions such as these requires rigor. We need to define terms, identify alternatives, devise comparative methods, research and analyze information and data, identify probabilities and risk of consequences, and select a methodology to deal with all these factors. Even after this rigorous analysis we know there is a chance that our decision will prove to have been wrong and we chalk that up to an unknown element of chance.

It is the latter type of decisions that are the subject matter of decisions theory. The modern discipline of decision theory is approximately one hundred years old. Decision theory attempts to provide a model for individuals and groups to be able to make rational decisions. There are two branches of decision theory: normative and descriptive. Normative decision theory describes how rational decisions should be made; and descriptive decision theory describes what actually happens in the process of making decisions.

Classical decision theory is based on several assumptions. (1) the agents making the decision are rational and are seeking a solution on a rational basis; (2) options which can be chosen actually exist; (3) the process of choosing will be nonrandom; (4) the result of the decision will have an expected utility; that is, it will have value to the decision maker; (5) risk in the process of decision-making is quantifiable; and (6) uncertainty in the process exists when probabilities are unknown.

The elements of the decision process are the decision-making agent, the universe of possible options or alternatives, an assignment of the expected value of each possible option, and an estimation of the risk factor associated with each possible option or alternative. Decision theory uses a wide variety of mathematical and statistical methods to evaluate expected value and risk factors.

In an organization, management is the agent that makes decisions. Once the decision has been made and implemented, systems of review and feedback are put into place to ensure the actions of the organization move toward accomplishment of the chosen solution. Ralph Stacey, in his book *Complexity and Creativity in Organizations* describes this feedback loop: "The second time around the loop, discovery consists of monitoring the actual outcome against the intended outcome expressed in the plan and feeding any deviation between them back into the choice procedure to identify corrective action. Choice and action then consists of choosing in carrying out this corrective action. The whole purpose of this technically rational decision-making and this monitoring form of control is to remove surprises, to damp down change and keep an organization moving stably through time according to the joint, prior intention of its members." Thus the process of decision-making changes from rational to one of power and control in the organization.

Many criticisms are leveled against this approach to decision making. No individual organization can claim to be totally rational and ignore the input of preference and emotion in the decision-making process. Possible options and alternatives considered in the decision-making process may not represent all the options actually available, especially if the time horizon is far off. The process of assigning expected values to the available options is not as precise as pictured. If the decision time frame is long, expected values may change radically or vanish. Uncertainty in the decision-making process does not represent lack of knowledge, but reflects those elements that are actually unknowable.

Stacey summarizes the heart of the criticisms, "The immediate conclusion drawn is that ignorance can be overcome by greater investment in gathering information, funneling it to some central point or it can be analyzed, and then feeding it back to the actors. The dominant schema therefore leads people to believe that ignorance can be overcome by research into organizational excellence, incompetence can be overcome by training and developing managers, and systems can be used to prevent bad behavior."

The problem with decision theory, as we have described it, is that it is based on a Newtonian clock-like universe and does not accurately describe the universe as it really exists. The science of Complexity Theory provides us with a much better framework to understand the dynamic process of decision-making in organizations.

Decision Making in Complex Organizations

Organizations are complex systems. A system can be considered complex if its agents meet four qualifications: diversity, connection, interdependence, and adaptation. In an organization the agents are all the people who work within the organization. These agents are diverse in that they are individuals with their own unique personalities, experiences, intelligence, emotions, preferences, etc. They are connected with each other by affiliation within the organization for the purpose of achieving the goals of the organization. They are interdependent since the work of each depends upon the other members of the organization. They adapt because each member of the organization is learning, changing, and evolving as a result of his interactions with the other members of the organization.

The process of adaptation is highly dynamic in response to local and global environments. The local environment of an organization is the interactions that occur within the organization; global environments refer to the interactions of the organization itself with other organizations. As organizations are connected and interdependent globally, organizations themselves learn and change and evolve locally, and individual agents within those organizations also adapt. It can be seen that adaption is a highly interconnected dynamic system.

Complex systems are often unpredictable and they can produce large events. They are robust and able to recover from serious damage. Complex systems produce bottom-up emergent phenomena where the results on the macro level are not equal to the micro parts of the organization. This phenomenon of emergence means that not only will the results be larger than the parts, but that at times the results will be different in kind. An example often given is the phenomena of self-organization seen in flocks of birds or schools of fish. Emergent phenomena arise bottom-up without any top-down planning.

To understand the process of decision-making in complex organizations we must understand the concept of landscapes. Professor Scott Page in The Teaching Company course, *Understanding Complexity,* presents a full description of landscapes in complex systems. The idea of the landscape is both a metaphor and a mathematical object wherein the value of a function at a particular point is mapped as an elevation on a landscape. Landscapes are composed of valleys and two kinds of peaks: local and global. A local peak is a point on the landscape from which a step in any direction is a step down in elevation. A global peak is the highest of all the local peaks of a given landscape. In the metaphor a peak represents a high point of value and for organizations, the height of the peak represents the economic success of the organization at that point in time.

Professor Page describes three types of landscapes: Mount Fuji, rugged landscapes and dancing landscapes. A Mount Fuji landscape has only one peak which is both the local and global peak. A rugged landscape has many local peaks and one global peak. This is the case when many organizations are represented in the landscape; the economic value of each of the organizations is a local peak while one organization that surpasses all others is represented by the global peak.

The metaphor of dancing landscapes is important to our discussion of decision-making in complex organizations. Recall that all the organizations represented in the landscape are themselves part of a complex system. They are diverse, connected, interdependent, and adapting. Each of the organizations is in competition with the other organizations in the landscape. As one organization makes decisions that increase its economic value, other organizations in the landscape experience a decrease in value. In our metaphor the local peak of the successful organization increases in height while the local peaks of the other organizations decrease in height. The landscape has changed its configuration and has "danced". The ongoing dynamic of decision-making within all the organizations and the resulting increases and decreases in value results in a dancing landscape.

The paradigm of decision-making in complex systems is radically different from the classical model of decision theory. Complexity theory teaches us that the future is truly unknowable, not just unknown. Stacey writes, "Creative futures emerge unpredictably from self-organizing interactions between members; therefore, they clearly cannot use some forecast of long-term outcomes to decide between one action and another." As previously mentioned, Stacey discusses the assumption in classical decision theory that the future is merely unknown and that by applying more resources to the effort we can discover it. We cannot assign probabilities, future values and risk estimations since we live in a dancing landscape.

Classical decision theory is based on the assumption of rationality; agents act in rational ways in search of solutions that are rationally measured. Complexity theory recognizes the strong dynamic of the entire psychological milieu within the organization. We cannot represent all the elements of decision-making on strictly rational grounds.

Complexity theory teaches us that the goal of stability and uniformity in the organization may be a self-defeating one. Stacey writes, "Organizations are systems that are part of a larger environmental system and that evolve through a process of creative destruction and spontaneous self-organization. Such evolving systems are in states of non-equilibrium, and their futures are unpredictable. Disorder is an essential part of the progress of the system. Organizational and environmental systems are so complex that agents within them cannot plan their long-term futures. Those futures emerge or evolve from the interactions between agents."

Complexity theory teaches us about the process of learning, changing, adapting and creating within an organization. Organizations exist on a continuum from highly structured to disordered. In a highly structured organization authority flows down from the roles occupied by the powerful. As a result, most members of the organization are left with little individual freedom. The work of the majority of members is to implement actions intended to achieve the outcomes intended by the powerful authorities within the stable organization. However, complexity theory shows us that learning, change, and creativity occur in the disordered state at the edge of chaos. So as authorities create a more stable and structured organization, they create an environment less likely to produce learning and creativity.

The current nature of management is based on the premise that order in an organization is maintained by strong management and clearly defined and enforced structure. However, the science of complexity shows that order is a bottom-up phenomenon, not top-down. Self-organization is an attribute of complex systems and management need not fear anarchy.

Lessons from Complexity Theory

Leaders of an organization cannot know, any more than anyone else can, where the organization is going. The future is uncertain and probabilities and risk factors cannot be measured.

As local and global environments become more complex, landscapes will dance to a faster tune. The pace of evolution and change in organizations that learn to adapt more quickly will prosper and survive.

Large breakthroughs and emerging phenomena will arise in the organization that recognizes itself as a complex system and manages itself accordingly.

The role of management in the organization is both complex and paradoxical. On the one hand management has the responsibility to maintain stability and organization, while at the same time, allowing and fostering the presence of disorganization wherein learning, change, and creativity may flourish.

Ralph Stacey summarizes the role of management. "A complexity theory of organizational development therefore ascribes very important and very difficult roles to management in addition to the currently dominant notions that also continue to be important from an ordinary management perspective. Complexity theories of management lead to a very rich, paradoxical theory of leadership in which leaders have to be both the conventional directors of others in the far more subtle containers of their anxiety and provokers of their double-loop learning capacity. These different attributes of leadership do not blend harmoniously with each other. Instead, they conflict with each other; directing and intentionally not directing are diametrically opposed ways of behaving and both are required of an effective leader in a complex adaptive system."

Complexity theory does not give us a new, theory du jour of managing and decision making. Rather, it sheds light and allows us to see more deeply into the not-so-neat world of organizational leadership and action.

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2011

Searching for Vitality:

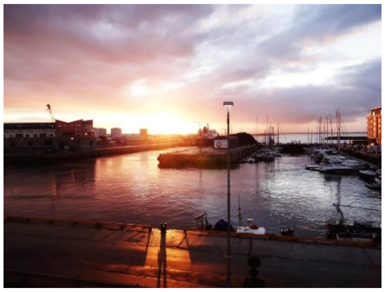
Coaching Through the Lenses of Adult Development Theory and Research

William Bergquist

Research on adult development strongly suggests that competence and productivity do not significantly decline as a function of age. The priorities of adults do appear to change, however, as evidenced by such things as their focusing on quality rather than quantity, and their potential role as organizational leaders. Understanding the characteristics of productive members of an organization, whatever their age, can help one as a coach encourage and guide clients in new directions or toward changes in their organization that facilitate vitality. In this essay, I will summarize the literature on internal factors associated with adult development and ongoing vitality across all age groups. As an aid in understanding the possible shifts in priorities as we age, I focus, in particular, on the literature about adult development as it specifically applies to men and women working in organizations.

Adult Development and Shifting Priorities

As we grow older, our interest in, and perspectives on, various modes of productivity change. We like to do different things in our 50s and 60s from what we did in our 20s, and aspire to different goals from those of our youth (Bergquist, Greenburg, and Klaum 1993). This is the central message to be conveyed by the research on adult development: we must consider the factors that influence the productivity and vitality of our mature coaching clients.

 The discovery—or invention—of adulthood and adult stages of development in the behavioral sciences is significant for it has shifted our notions about how to motivate and revitalize men and women beyond 21 years of age. We now know that people differ significantly with regard to needs and interests not only as a function of gender, race, socioeconomic level, and abilities, but also age. As we look as coaches that foster the vitality of our coaching clients, it is not surprising that we have recently looked to research and models of adult development for guidance.

While the notion of human development can be traced back almost a century to the work of Arnold van Gennep, Jose Ortega y Gasser, and Carl Jung, it gained prominence and a stable theoretical base with the work of Swiss psychologist Jean Piaget (1896-1980) and German-born psychoanalyst Erik Erikson (1902-1994). Piaget (Inhelder and Piaget 1958) identified four specific sets of cognitive competencies that must be acquired in a sequential manner as children mature and become thoughtful and successful adults, and one must successfully achieve the cognitive competencies associated with one stage of the Piagetian model before proceeding to the next stage.

A few years later, Erikson (1985) described eight stages of life, from infancy through old age. Unlike Piaget, Erikson assumed that one moves on to the next stage of development in life, regardless of one's level of success in the previous stage or stages. In the Piagetian model, unsuccessful development results in a person's being stuck at a specific stage of life. Conversely, in the Eriksonian model, one carries developmental failures forward in life, making success in each of the subsequent stages more difficult as the continuous accumulation of failures becomes more damaging and difficult to overcome.

Eriksonian Models of Adult Development

The first four of Erikson's developmental stages address the issues of infancy and childhood. The last four stages address the issues of adulthood. The fifth stage concerns primarily the formation of identity as an adult, and the building of a sense of continuity in life roles and goals, while the sixth stage focuses on the capacity to establish an intimate relationship and the formation of a loving relationship with another person. Generativity is central to the seventh stage, with midlife adults concerned with guidance of the next generation. The eighth and final stage concerns primarily the integrity of one's life experiences and the acceptance of one's own distinctive life cycle (Erikson 1982).

Nature of the life cycle

The basic Eriksonian model has undergone two major extensions and modifications over the past three decades (Gilligan 1982; Levinson 1996; Levinson et al. 1978). Like Erikson, Levinson addresses the life cycle, but his studies of the life cycle in men (Levinson et al. 1978) and women (1996) focus on the last three Eriksonian stages, specifically on the seventh stage. Within the seventh stage, Levinson concentrates on the transitions associated with the early 40s, expanding on Erikson's model by identifying both structure-building periods and structure-changing or transitional periods within specific life-cycle eras. The crises and stress associated with transitional periods are normal aspects of the developmental process and are to be differentiated from adaptive crises, which occur when a major traumatic event occurs in one's life (such as combat, illness, or abuse).

Developmental crises may be very traumatic and demand a reevaluation of one's priorities and needs, yet without these crises and the structural changes they bring about, men and women are likely to remain caught in their current stage and will be ill prepared for addressing the age-related challenges of their next era in the life cycle. Originally, the midlife crisis was identified as the struggles of men and women in their late 40s who have never addressed the life changes inherent in their early 40s, not the normal and necessary transitions of the early 40s that are the points of "crisis." It is the failure to address midlife issues that produces the “midlife crisis” not the transitional period itself. This area is often misunderstood in the popular literature on adult development.

While Levinson built on the Eriksonian model by focusing on points of transition and, in particular, on midlife. Gilligan (1982) focused primarily on differences between men and women in their movement through the life cycle. She challenged the assumption in Erikson's model that all adults form their one identity in early adulthood prior to the formation of intimate relationships. She asserted that this assumption might be specifically applicable to males (and even more specifically to males raised in Western European or USA cultures). Gilligan noted that many women (and some men) form their identities in conjunction with their experience of becoming intimate with another person. Moreover, she argues. Erikson overemphasizes a movement toward greater individuation and the clarification and reformulation of one's own personal identity independent of the specific context within which one lives. One's identity, after all, exists within a specific context, and maturation could be considered a movement toward mutuality of care rather than greater individuation.

Implications for coaches

(1) Is this a period of stability or change for client? Often it is a period of change between life stages. Client needs coach's support to match/balance off the challenge inherent in this transition.
(2) Is it is a period of change, then client might experience themselves being in Bill Bridge's "neutral zone" – a state of limbo in which there is an attraction back to the old (and this attraction must be honored) as well as a pull toward the new.
(3) Coach can help client acknowledge the shifting values, interests and priorities that come with a shift in stages
(4) Coaching questions about the four adult stages (as well as the other four): identity, intimacy, generativity, ego-integrity. All four stages are in operation (actually all eight stages) even though one stage is in the spotlight.

Piagetian Models of Adult Development

In keeping with the epistemological orientation of Piaget, most Piagetian models of adult development begin with a concept of unfolding or maturing cognitive structure, and their impact on personal and interpersonal aspects of self.. Kegan (1982), for instance, offers a six-stage theory of development that traces the maturation of the construction of meaning processes in one's life, believing that human development consists of a series of stages in which one's sense of self becomes increasingly differentiated from his or her sense of the external world.

Nature of cognitive maturity

A comparable model of adult development that relies on cognitive maturation (Loevinger, Wessler. and Redmore 1970), while clearly in the Piagetian camp, questions the Piagetian assumption that each stage builds on the previous stages and is somehow superior to them. Each stage “has its weaknesses, its problems, and its paradoxes, which provide both a potential for maladjustments and a potential for growth" (Loevinger 1966. p. 200).

Loevinger also focuses on the extent to which one is able to reason and make decisions independent of other people and. in particular, the dominant frames of reference offered by the society in which a person lives. In many ways, the research and theorizing of Gilligan and her colleagues take the concerns of Loevinger one step further. Not only are “higher" stages of cognitive development not necessarily better than lower stages, they also may represent a model of development that is neither descriptive of development in all people nor necessarily an appropriate source of normative guidelines.

Implications for coaches

(1) What the client is manifesting to the coach might not be resistance. Rather it might be that the client simply “doesn’t get it” – can’t make sense of what the coach is suggesting or asking the client to reflect on (2nd order learning required for reflection on self). The coach might try changing the language she is using, might make her conversation more concrete—using examples and metaphors, encouraging specific action steps and immediate evaluation of impact and outcomes.

(2) Coach needs to be patient about reflective processes. The client is often not just reflecting on his own assumptive world, but also learning something about the processes of reflection.

(3) The coach needs to consider addressing issues in their specific context rather than moving quickly to an abstract level or to generalization of the lessons learned by the client.

Conclusions

The field of adult development theory has much to teach us as professional coaches about how people continue to change, learn and develop during their entire lifetime. This change, learning and development can be assisted by skillful and knowledgeable coaching. Furthermore, concepts of adult development are particularly important to keep in mind when coaching men and women at mid-life and beyond. There may be snow on the roof but there is also fire in the hearth. Vitality is there with the skillful and knowledgeable support of a professional coach.

2012

An Invitation to Renewal

Gail Johnson Vaughan

What is renewal? The word “renew” is a verb, an action. It means “to make like new; restore to freshness, vigor, or perfection. I like that, to restore to perfection. It reminds me that we came into this life perfect.

Life is complex, with assaults from every side. We quickly develop our own set of survival strategies to mask and protect our perfection. Before long we have hidden it away so deeply that we have forgotten that it exists. And we muddle on. We come to believe that the caricature of our perfection that we present to the world is who we really are. That caricature takes on a will to live and can fight fiercely to protect its existence and primacy in our lives. Without realizing it we have let fear usurp our true Selves. No wonder it is so hard to renew.

Synonyms for renew include: recharge, recreate, refresh, regenerate, rejuvenate, repair, restore, resuscitate, revitalize, revive, revivify.   Each of those words begins with “re” a preface that means to go back to the way things were when we were whole. Emmmm   I feel better already!

Renewal is about becoming more vibrantly alive.   It is about our health, our energy, and our lives at their deepest level. It is about waking each morning with a sense of purpose, contentment, energy.

Many of us experience energetic fatigue. There is so much to do, so many calls on my time and energy. We are very good at grinding through. We can do "busy", but do we do what matters most to us? Do we have the meaning in our life that comes from doing what we are meant to do?

The need to renew shows up in many ways. Over time we feel less creative. Perhaps our energy level is lower, or our sense of humor is not what it used to be. We may be a bit grumpy, or uncharacteristically withdrawn. Perhaps we have medical symptoms – the body gives us signals if we pay attention.

"In each of us there is a future that is seeking to emerge." These thoughts come from Otto Scharmer, a writer and thinker, who writes about the places where we hide our perfection. He calls this *The Blind Spot.* The reason it is blind is that it is an invisible dimension of our everyday experience. It is that place within us or around us where our *attention* and *intention* originates. It is the *Source* from which all our actions originate… and we can't see it. Nonetheless it is this place that we must visit if we are to truly renew. Our primary source of learning how to be in the world comes from experiences of the past. If we want to truly renew we want to bring back as much of our hidden, authentic selves as possible, to live at a level of aliveness we rarely allow ourselves.

Sometimes the experiences of the past aren't very helpful in getting us there. In fact, experiences of the past can be the biggest obstacles in moving toward a future that wants to emerge. How can we learn to better sense and connect with a future possibility that is seeking to emerge? *We can learn from the future as it emerges.*

Scharmer suggests that we need to sense, tune in, and act from one's highest future potential – *a future that depends on us to bring it into being.* What's *most important is what's invisible to the eye.* Becoming aware, individually and collectively, of our inner places from which we operate in real time may well be the single most important leverage point we have to bringing ourselves, our community, and our world to its highest potential. Shall we go deeper?

What is this future that is seeking to emerge? How do we even begin the journey? I'd like to offer you a topographical map to get there. With the map you can hike, or walk, or stroll, or roll through a descending terrain. The map leads you through landmarks. The mountain of observations, the forest of retreat, the meadow of reflections. At the far end of the meadow is the spring of Deep Knowing, fed by our *Source*. You will touch that spring and be refreshed with energy that allows you *to act on the deep knowing instantly.*

I want to talk about the landmarks on the map. The first is: the *mountain of observation*. Through observation we can become deeply aware. This is not as easy as simply looking. It involves sensing and feeling. It concerns the relationship between the observer and the observed. To be done well it requires us to be aware of the lens we look through. It involves suspending our assumptions and "noble certainties" by holding them up for examination, setting aside our habitual patterns. It is about seeing with fresh eyes.

The second landmark is the *forest of retreat:*. This is where we give ourselves space and time, if only when you turn the television off, or take a walk during a work break, or hike or drive. It can be moments of meditation and stillness. It can be a deep conversation where you listen deeply and allow yourself to be moved.

The third landmark is the *meadow of reflection*. When we reflect we continue to suspend our habitual ways of thinking and acting and allow space for the observations to swirl around, to be experienced, not just thought about; to make room for the alchemy of creativity and emergence of that which is waiting to be known.

But the meadow of reflection can be a challenging place. It seems so serene, so easy to walk through and rest in, but it can also be a place that makes us restless, antsy, ready to move on before its gifts have been revealed.

Think about how in meditation you sit on a pillow and move one level above your habitual engagement to see from a more aerial perspective. How many of us have sat in mediation and felt like nothing happened? The whole point of reflection and suspension is that you have to tolerate that nothing is happening.

Time in this meadow is well spent redirecting our attention from the exterior to the interior by turning our attention toward the *source* of our mental process, rather than the object. Redirecting expands our senses. It helps us view from a perspective that allows us to see how our own actions contribute to our "stuckness, our tiredness, or the problems at hand. It is at this point that we begin to see ourselves as part of the issue and recognize our own power over something we thought was caused purely by external forces.

Suspension and reflection are very funny phenomena. You have to stay with them. Then, if we are lucky, we can bring ourselves to a *deeper place of stillness* where we can let go of the old begin to renew --start to connect with our higher-order intentions. Once we have let go, the landmark *Spring of Deep Knowing* becomes visible. It is there all the time but hidden from our sight. It is the true Self, *the Source*, that we have hidden away to keep it safe.

Traveling through these landmarks takes is about opening yourself to a deeper level of knowing. This is a knowing that is already inside you.

In 2006 I had an experience that relates to this. I had been running Sierra Adoption Services for over 20 years. I'd done a good job, helped thousands of children in foster care get permanent families, and even had a big impact on improving our child welfare system. I was at the top of my game. One day I was running with my husband when these words came out of my mouth: "I don't want to run the agency anymore." "Don't burn your bridges he said." My reply was simple "my job is keeping me from doing my work." My job was running a large, successful special needs adoption agency. My work is influencing transformative improvements in child welfare. I knew it was time.

Later when asked if it was a hard decision to make, my reply was "it wasn't a decision, it was a deep knowing." One professional colleague that I highly respect said "oh yeah, yeah, a deep knowing" and laughed. But it *was* a deep knowing. The future that wanted to emerge in me was clear and insistent. I was lucky. I drank from that Spring of Deep Knowing and acted on it.

Francisco Varela, another amazing thinker gives us on the wisdom to guide our journey back up the mountain. He takes us to the *landmark of open vistas*. You can see so clearly from this place. Now that we have *let* go, he says, and experienced *Source*, the first rung of the climb home is to *let come.* Now we have the opportunity to redirect from the inner way of seeing to the exterior action of renewal… *it is a process of crystalizing our vision and intention.*

What did you learn about your highest potential in your mediation this morning? What does it look like from a place of deep knowing? What do you see as your vision and intention becomes crystal clear?

The final landmark, the *landmark of verdant fields* shows you that you have returned home. Finally, the process of suspending habits and routines on the way down, turns into embodying the new actions and ways of being on the way up. The seeds of Self that you kept so protected are now sprouting actions and energy. You feel a vibrancy you had forgotten. You engage deeply in all you do. You love and are loved. You do what matters most to you. You choices are deeply guided by your deepest values. You live and act from your purpose in life.

What will allow us to successfully make this journey of renewal? We each have three instruments or capacities that we can use.

The open mind- the ability to access our intellectual (IQ) type of intelligence. This allows us to see with fresh eyes, to deal with the objective figures and facts around us. As the saying goes: the mind operates like a parachute: it only functions when it is open.

The second capacity, *the open heart*, relates to our ability to access our emotional intelligence, that is, our capacity to empathize with others, to tune into different contexts, and to put ourselves in others' shoes.

The third capacity is *the open will.* This relates to our ability to access our authentic purpose and self – the big S self that we have hidden away, rather than the small s self that we show the world. This type of intelligence is also sometimes referred to as intention or spiritual intelligence. It deals with the fundamental happing of the *letting go* and *letting come.*

At the source is a well of water. You can drop a pebble into this well. As you do you will see the ripples of the beginning of your journey be joined and impacted by the ripples of others in your community who have dropped their own pebbles in the well. This symbolizes the fact that although your personal journey is your personal journey, you are not alone. All of us on this journey will create renewal of our community. I wonder what we will find when we collectively return to our source?

2013

The Power of the Authentic Interviews
Getting to know yourself better

By Anne Miller

Self-awareness creates personal power – the power of choice. Throughout our professional life, many of us take assessments that are likely to reinforce what we believe about ourselves – the good and the bad. And when it comes to how we show up to others, we either shy away from the mirror or mostly rely on impersonal or highly structured instruments like 360-degree reviews or formal performance reviews.

There is another way to raise one's awareness, discover actionable choices and provoke conversations that lead to a feedback-intensive coaching culture.

The Authentic Interview (AI) is based on the principle that no one in an organization exists in isolation but rather that we constantly define who we are in interaction with others. The best way to understand if the identity we want to portray is actually the one that is being experienced by others is… to ask them. The key is that each person must take responsibility for what he or she says - and for the relationship - during the Authentic Interview, because in the AI the cloak of anonymity is gone.

What is the Authentic Interview?

Authentic Interviews are, simply, focused, face-to-face feedback conversations. They are normally conducted with 5-7 colleagues, with whom a person works closely. The objective is to better understand how others experience us. It is about fact finding and not about turning oneself into what others want us to be. If how we show up does not align with the identity we enjoy or want to create, then the increased awareness we gain will offer us actionable choices for change.

The interview conversation invites others to assess who we are being and how we are behaving when interacting with them. Asking for and accepting the assessments not as the truth, but rather as grounded or ungrounded stories others are telling about us, generates a more open relationship. Let's think of it this way: We are hearing all those unspoken and anonymous communications – face to face.

The Authentic Interview does not dredge up history but is rather about the mutual relationship and experience, *now*. A sample of the questions might include:

1. What do you most appreciate about my leadership/management/team-role now?
2. How would you describe what I might contribute as a leader – that is, what do you see as important for me to give?
3. What three words/phrases describe me when I am at my best?
4. What three words/phrases describe me when I am <u>not</u> at my best?
5. In your observation and experience with me, what challenges attract most of my attention?
6. If you had to name one thing I stand for as a leader what would it be?
7. What are one to two suggestions you have for me to be more effective as a leader in this company?
8. What has remained unspoken between us that we should address?

When to Use the Authentic Interview

The Authentic Interview is most effective for leaders who want to move beyond past successes and raise the bar in their development. Even if they have participated in a

360-degree assessment, it is most useful for changing the conversation and mood in the organization, by giving permission and encouragement for people to talk openly to each other about those things normally kept in the background. Most human beings perceive face-to-face conversations as healthier and much more productive than indirect communications – even if it's harder.

At the *Luminarias Group*, we use Authentic Interviews with our coaching clients working in organizations, irrespective of the coaching challenge. We assume that improving coordinated action through higher quality conversations and greater awareness of how each of us shows up to others will benefit all leaders. In *cohort (or group) coaching*, the impact is even greater than when it is implemented by only one individual. When group members interview each other, they seed their relationships with a sense of trust and a comfort that encourages them to continue such dialogue.

The timing of doing the Authentic Interview can vary. It is most effective if done early in the relationship in order to establish candid ways of working together. Even later on, it opens up the opportunity to correct or change mutual perceptions rapidly. This is especially true if immediately followed by Marshall Goldsmith's Feed Forward method (http://www.marshallgoldsmithlibrary.com).

Benefits You Can Count On

The Authentic Interview does much more than just build self-awareness for the person conducting the interviews. When we speak with those who have followed the practice, they report experiencing several benefits:

1. The AI provokes a conversation for appreciation and concern that makes explicit how a person is being perceived. And in so doing, it helps the person gain clarity and affirmation for their strengths and valued contributions in service of what gets them out of bed each morning. In the conversation, new insights are generated for personal and professional development in a supportive and credible rather than critical manner.
2. The AI opens up others' perceptions, allowing them to shift their perspective, rather than continuing to fit everything into what they already "know" about the interviewer. In our coaching practice we have observed that when a leader does

not attempt to shift her behaviors, it is often because she feels her environment has already made up its mind as to who the person is and fits any new behavior into the old box. When we demonstrate that we are open to changing our assessments of others, a positive two-way shift takes place in the relationship.

3. The AI helps the leader be a role model for creating a feedback-rich coaching culture. Individuals get engaged as advocates for each other's development and for the bigger potential of what they can accomplish together.

One of the biggest ancillary benefits of using the AI consists in simply educating people how to address and exchange personal observations with clean communication, with all the subtleties of emotional self-control and resilience in the moment and, ultimately, how to dare show up authentically with their colleagues.

2014

Your Ultimate Coaching Tool: The GROW Model Explained and Why it Always Works!

By Emma-Louise Elsey

You probably use the GROW model (or T-GROW) without even realizing it:

T – Topic (Session Topic)
G – Goal (Session Goal)
R – Reality (Where they are and what's going on for them)
O – Options (Ideas and brainstorming – what they COULD do to move forwards)
W – Will Do (Their actions – what they WILL do to move forwards)

In reality it's probably more like ROTGOW or TROWG or TRORGWOW but these 5 key elements ALWAYS work and here's why:

T – Topic:
While establishing the Topic often blends into the Goal and Reality parts of the model, getting a topic up front – even a loose one – is the start point for any coaching session. Sometimes the client will come with a clear topic and other times we may start by discussing their 'Reality' to find out what they want to work on. Questions like, "What would put a smile on your face?", "What's been working for you since the last session?", "What hasn't been working for you?" can help to clarify a session Topic.

G – Goal:

This is the client's goal for the session – and while it doesn't have to be specific or 'SMART' it does need to be enough to give the session a clear purpose understood by both the client and the coach. For example, a session goal might be to establish a bigger goal or to gain some clarity in their lives – it just has to be enough for you to keep the client on track.

One of the things that makes coaching different from many other therapies is our focus on action and change. A session goal helps us keep the client focused and when the session drifts it gives us the ability to say, "We seem to be heading in a different direction here, is this what you want?" Tip: This tactic can be especially helpful if you have a client that likes to tell long stories.

And no, the goal doesn't have to be agreed right up front – although it's helpful if you can. A session goal can be 'evolved' as the session unfolds. And occasionally the 'real' goal of the session may not come out until the end when we ask our clients what their biggest win of the session was. This is when the client realizes their 'goal' for the session was simply to feel heard, to commit to themselves or to feel challenged or supported.

When we ensure the client understands what they want to get out of the session – we ensure the client receives value from coaching – and that they continue to learn and grow.

R – Reality:

Reality is about the client understanding their situation and how they got there. It's where we question, challenge, reframe and reflect back to our client where they are, what they've done so far, what's working and what isn't. It's about really getting into where the client is right now and why. It should include talking about feelings and digging into emotions, gut-feelings and intuition – often new or uncharted frontiers for our clients.

For me, the Reality section is the 'meat' of any coaching session where we raise our client's awareness around their values, priorities and beliefs – so they gain insights and learn about themselves.

O – Options:
If the client could solve their problems alone they would have done. Often what they need from us is help brainstorming, a push or some support to take an action they have been putting off. It may involve tweaking an existing action, challenging and inspiring them to make an action bigger or it could also mean shrinking an action to make it more achievable. Either way, a good dig around in the 'Options' to find actions and solutions that really work for our clients pays huge dividends in moving our clients forward. Tip: I have often found that the best and breakthrough actions come out toward the end of the Options discussion, so make sure you allow enough time… Check out our FREE Questions Worksheet "37 Questions to Liberate Your Clients From Themselves" for some great Options (and Action!) question ideas.

W – Will Do:
The essence of coaching is change – some sort of action – even if the action is to change the way they do something, to stop doing something or even do nothing! I always make sure every client leaves their session committed to at least ONE action otherwise our session would simply be a conversation. And while a conversation can be helpful – nothing changes unless something changes. Tip: Check-in with the clients about how they FEEL about their actions. Can they commit to them 100%? Is there time to fit the actions into their busy lives? Would they like to be stretched more, or do they need to simplify their actions to maximize the chances of success?

W can also be – "WHAT do you need from me?": Ask this question to find out what they need from you to support them.

W also stands for – WIN: "What was your biggest win of the session today?" As mentioned under 'Goal', I always ask some variation of this question at the end of my sessions. By asking this, we not only reinforce the value of coaching but over time both you and your client will learn what's really important to them.

In Summary:

So, what's missing from this model? Perhaps a review of actions set at the last session. It's possible this would come up under 'Topic' or 'Reality', but unless we explicitly ask it could get missed. I usually start my sessions by reviewing the actions from the previous session – but at whatever point you do this, an action review is essential for accountability.

I see the GROW model as the coaching session "basics". Without any one of these elements, something would be missing. And, the great thing about the GROW model is that you can apply any other coaching tool or model over the top. But as long as you follow this simple structure, you can't go wrong - the GROW Model is your ultimate coaching tool!

Article Excerpt:

There are many, many different coaching models out there but I still haven't found anything that beats the GROW model for simplicity, effectiveness and results. If you embrace the GROW model – your clients will love you and you'll never lose track in a coaching session again.

2015

Why Transformative Coaching Takes Guts

By Marcia Reynolds

Most trained coaches know how to be supportive, encouraging and nonjudgmental. These approaches are useful but often not enough to create a new awareness. Coaching starts by building trust and rapport, but as the conversation goes deeper you might need to generate a bit of discomfort to create a breakthrough in thinking.

What happens when you challenge someone's thinking?

In order to define who we are and make sense of the world around us, our brains develop constructs and rules that we strongly protect without much thought. In *Who's in Charge? Free Will and the Science of the Brain* (Ecco, 2011), neuroscientist Michael S. Gazzaniga says we get stuck in our automatic thought-processing and fool ourselves into thinking we are right. When someone asks us why we did something, we immediately come up with an answer even if the response doesn't make complete sense. We instantly concoct a brilliant reason for procrastinating on a task for prioritizing reading email over a project deadline or for making life decisions based on how we will feel in the future when, in truth, we can never be sure how the circumstances will impact us emotionally.

To disturb this automatic processing, you reflect holes in your client's logic and ask questions that reveal the fears, needs and desires keeping the constructs in place. NeuroBusiness Group founder and CEO Srinivasan S. Pillay, M.D. writes that this coaching approach is the only way to stop the automatic processing. Reflection and questions crack the force field that protects your client's sense of reality, enabling her to explore, examine and change strongly held beliefs and behavior.

The reaction to bringing these things to light will register somewhere between slight discomfort and an emotional outpour. Momentary confusion and abrupt realizations trigger emotional reactions. The truth can hurt or at least surprise you before it sets you free.

Therefore, negative emotions can be a good sign. When your client realizes she has blocked a truth that was in her face the entire time, she may feel mortified, angry or sad. She is finally confronting her rationalizations and seeing her blind spots. For a moment, her brain does not know what to think. As Nessa Victoria Bryce writes in the July/August 2014 issue of *Scientific American* Mind, this pause in certainty as the brain rushes to reinterpret information is necessary for a clearer and broader understanding of the situation to emerge. In researching how coaching works in the brain for The Discomfort Zone, I found this moment of uncertainty is necessary for behavioral learning to occur. Only with this new awareness will your client willfully commit to behaving in a different way.

How do you know what to say to trigger the brain to learn?

The powerful questions that change clients' minds emerge when you listen to your heart and gut as well as your head. You ask about what you sense—what fears, disappointment, needs or desires are conveyed to you without words. Your client then stops and questions herself.

You need to access your entire nervous system to pick up signals from your client's entire nervous system. Some people define this process as listening to your intuition; biologically, it means you're listening to and trusting all of the signals you receive from your heart and gut, as well as your head. In so doing, you access the critical data you need to fully comprehend what is going on in the human you are conversing with.

To activate your full sensory capabilities, you need to feel grounded in the present moment and visualize opening all three centers in your neural network where you receive input. Then you have to trust what you sense and courageously ask your client for permission to share these notions. When you do, you need to bravely accept how she reacts.

Depending on your personality, you may find it easier w access one sensory capability over the other. People who tend to be helpers listen more easily from the heart than the gut. Risk-takers who move quickly on instinct find it easier to listen from the gut than from the heart. As a born risk-taker, I have to consciously open my heart when I coach, teach or argue with my partner. I may feel vulnerable, but it's effective.

If you intentionally practice listening from your various centers every day, you will come co more naturally access your intuition. This will help you discover the reflections and questions that will crack the Force field protecting your client's sense of self and reality, allowing a new awareness to emerge. The more you can get the neurons sparking in the brains of your clients, the greater the chance for a breakthrough in awareness to occur. Have the guts to use your heart and guts in coaching.

Tuning In

Listening with an integrated mind takes conscious and consistent practice. Here are four tips to help you access your intuition and positively challenge your clients:

1. Sense what your client is experiencing as you listen.

Don't just analyze her words, feel what emotions come up for you and reflect to her what you notice without assessing if you are right or wrong.

2. Ask yourself what you are feeling. Your emotions are likely reacting to what your client is feeling. Either you are experiencing empathy where your brain is mirroring hers or you are feeling anxious because you sense her anger, fear, disappointment or confusion. Ask her if she is feeling the same emotions as you. If her experience is different, she will let you know, thereby creating an opportunity for deeper exploration.

3. Allow your heart and gut to have a voice

Sit up tall and ground yourself in the present moment. Consciously guide yourself to feel curious (open mind), compassionate (open heart) and courageous (open at your core). Try to keep your head, heart and gut open and balanced while you listen. When you feel uncomfortable, speak and listen more deeply from your gut. When you feel impatient or begin to judge your client, focus on reopening you r heart.

4. Use silence to allow your client to form new thoughts and perspectives.

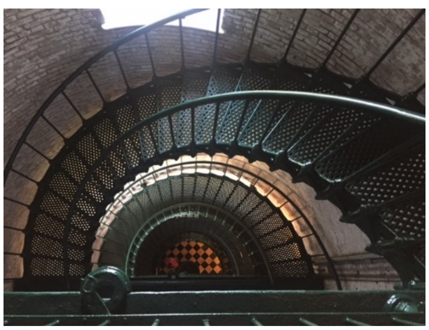
Silence is often an indication that your reflections and questions have penetrated your client's protective barrier. A new sense of self and reality is trying to emerge. It may take some time before your client can articulate what she now understands to be true. Be quiet while her brain is working.

2016

Psychological Contract or Covenant: The Coaching Challenges

William Bergquist

As coaches who work within an organizational context, we are often asked to assist our client in addresses fundamental and challenging issues as motivation, sustained commitment, workplace disappointments and psychological burnout. While many factors are at play in addressing these challenging concerns, I find that Edgar Schein's concept of psychological contract often can provoke rich insights for my clients. I would suggest that the extension of Schein's concept—which I identify as the *psychological covenant* -- often yields even greater insight, especially if there are powerful emotions (especially of anger) underlying the concerns being addressed by my client.



In this essay, I summarize Schein's concept, relate it to several of the more basic notions about workplace motivation, and end with the introduction of psychological covenant as an even deeper (and often unconscious) aspect of a client's lingering concern about the worth assigned to her work and the way in which she justifies her commitment to long hours of labor in her organization.

The Psychological Contract

The psychological contract, according to Schein, is an implicit agreement reached between an employee and her organization. As a psychological event, this agreement holds strong emotional implications (Dunahee and Wrangler, 1974):

> . . . it is a psychological agreement between two parties, and it is a much broader concept than the traditional use of the word "contract" in industrial relations. It is a reality that has a great many implications for productivity and individual satisfaction. This contract is concerned with the organization's expectations of the individual employee and the employee's attempts to meet those expectations. It also includes expectations of the employee, and the employer's continuing willingness to satisfy his needs.
>
> The dynamic quality of the psychological contract means that the individual and organization expectations and the individual and organization contributions mutually influence one another.. . . This contract is not written into any identifiable formal agreement between employee and organization, yet it operates as powerfully as its legal counterpart. Furthermore, it is not static; it is an evolving set of expectations. Thus, neither party to the transaction, since the transaction is such a continuing one, fully knows what he wants over the length of the psychological contract, although each acts as if there were a stable frame of reference which defines the relationship.

Every member of an organization, in essence, establishes a tacit (unacknowledged, often unconscious) contract between himself or herself and the organization that the employee has joined. This contract typically has to do with the rewards that the employee expects from the organization and the resources, services and attitudes that the employee will provide the organization in return. The rewards that an employee expects range from seemingly rational and publicly acknowledged expectations regarding salary, benefits and job security to often unacknowledged expectations regarding career advancement, public recognition and meaningful work, and even more highly irrational expectations concerning enhanced self-worth, personal security and friendship. Employees also tacitly expect to provide a variety of services and display certain attitudes. Some of these services and attitudes are publicly established, such as working a solid, eight-hour day. Others are less public, such as the employee's willingness to overlook the incompetence of managers, or their willingness to work overtime without complaining. At a particularly deep level, the employee may be selling his or her soul to the company in exchange for personal self-esteem.

Usually the psychological contract is unacknowledged and non-discussable within organizations. Everyone knows that they exist, but never talks about them—in part because they are very personal and because they are often unrealistic or unfair to either the employee or the organization. Schein suggests that much of the discontent inside many organizations can be traced to the breaking of psychological contracts between the employees and the organization. Governmental agencies, for instance, that have a long history of stable employment, may attract psychological contracts in which employees expect to have lifelong employment in exchange for faithful service and a passive acceptance of authority and even the ineffectiveness of governmental administration. Similarly, mental health workers at a financially strapped human service agency expect to suffer quietly and with dignity in exchange for the waiver of any genuine accountability for the services they provide.

At the heart of the notion of psychological contract is an economic metaphor. Employees are, in essence, exchanging their services, commitments and attitudes for certain benefits, that are to be derived from the organization. This metaphor is certainly appropriate to modern organizations, for work is defined in economic terms by these organizations. Groups of employees become "cost centers" for modern institutions and they produce services and goods that yield "income centers" to offset these costs. The psychological contract, however, also speaks to the limitations of the economic metaphor, for many aspects of the psychological contract relate to issues other than money and economics. Workers are interested in the meaning of their work and the recognition they receive for their work. Furthermore, the work place has often become the primary neighborhood for many employees and the primary source of friendships.

The work place has become the primary neighborhood primarily because workers frequently move, commute long distances to their job, and find little time (as members of a dual career family) to interact with people living in their own local neighbor. Many of us do not even know the names of our neighbors, looking instead to our colleagues at work (along with our spouses and immediate family) as the primary source of meaningful interpersonal relationships. And what happens, therefore, for those of us who work via a computer and the Internet (rarely going physically into an office to meet in-person with other employees).

As coaches working inside organizations, we can help our clients surface their own psychological contract and explore the implications of this contract for their current work and sustained commitment to their organization. We can ask probing (and important) questions: (1) is the psychological contract based on a realistic assessment of your own expectations for the organization (and the organization's expectations regarding your work)? Was the contract *ever* realistic and will it be realistic in the future? (2) what do you really want from your organization—at many different levels (both realistic and unrealistic, mature and immature)? (3) how and where do you find a safe and supportive place to speak about your expectations and the contract – can you share your own insights with colleagues, your supervisor, leaders of this organization?

Hygiene and Motivating Factors

Building on the need hierarchy of Abraham Maslow, Frederick Herzberg suggested many years ago that workers in the modern era tend to look first toward basic *hygiene factors* when judging the satisfaction of their job: job security, benefits, working conditions (comfort, safety), and clarity of job responsibilities. Once these factors are in place, the worker will look toward what Herzberg calls *motivating* factors, such as prospects for advancement, interpersonal relationships and the meaningfulness of the work. Salary can be either a hygiene factor (minimum amount of money to meet basic needs) or a motivating factor (sufficient money to buy things that I enjoy and the linkage of salary to personal accomplishments).

This two-factor theory relates directly to the shift that occurred in worker values between the modern and postmodern eras. In essence, the modern era was one in which Herzberg's *hygiene* factors were prevalent. A modern worker is motivated by the receipt of money (or food or shelter) on a regular basis, and by adequate working conditions. Trade unions were originally established at the start of the modern era to secure these hygiene needs, given that employers were no longer beholding to the paternalistic concerns that dominated their relationship with workers during the premodern era. The postmodern era, by contrast, is one in which Herzberg's *motivating* factors have become more prevalent—especially as unions (and government regulations) have more successfully ensured that the hygiene factors are in place.

The modern day psychological contract is built on the assumption that work is performing primarily to meet needs that are external to the work itself. We are paid in money or various forms of psychological capital (e.g. self-esteem) for work that is not inherently worthwhile. We redesign the work environment in order to motivate the worker and bring the worker more fully into the decision-making processes regarding work, without considering whether or not there is an implicit motivating force in the job itself. Mihaly Csikszentmihalyi speaks of the *autotelic* (self-rewarding and self-directing) properties of many jobs and notes that physicians, accountants, rock musicians, and teachers often find their work to be inherently gratifying and need no outside motivator to keep them involved, happily, in what they now do. Such factors are central elements in Herzberg's motivating factor. The notion of psychological contract may seem quite foreign to these autotelically-driven men and women who want only to be left alone to do their work, or want nothing more from the organization than the resources that are needed to perform their work.

Csikszentmihalyi further suggests that most of us, whether we are in self-satisfying jobs or not, spend most of our life looking for and attempting to replicate settings in which we find these self-satisfying (*flow*) experiences. We may do our boring job in order to obtain the money to perform our autotelic work (gardening, rock-climbing, dancing) -- in which case, the psychological contract is still an appropriate concept. Yet, even in this situation, we would be foolish to cease our search for ways in which the worker will find his or her current job autotelic rather than just a means to finding autotelic experiences in other settings.

A recent survey of employee needs at a high-tech firm in the San Francisco Bay Area revealed that the number one training need was in the area of rock climbing. Number two was woodwork. Several years before, employees suggested that knowledge about new scientific developments in their field is of highest priority. This no longer seems important. Has the work in this company become less autotelic -- such that workers are looking elsewhere (rock climbing, woodwork) for their gratification? Is it just because the employees are now older and less enthralled with their new technologies or has the company lost some essential drawing power?

The leader of another high-tech firm speaks of the currency of his company as "title and money; the only thing we seem to value. The number of people reporting to us is [our] measure of success." The challenge for the leaders of the first high tech firm is to find ways to reclaim the interests of their employees and to identify future problems and projects that will be as inherently interesting and gratifying as rock-climbing and woodwork. The leader of the second high tech firm must find something that will excite his employees other than position or salary. The employees in both of these organizations do not need a new psychological contract. They need more interesting work. Such a notion about work and about the motivation to work will lead contemporary organizations from the modern perspective to a post-modern perspective that is revolutionary in nature.

When you are coaching a client who works inside an organization how do you explore with this person the nature of their own hygiene and motivating factors? Where do they find "flow" in their own work and how do they discover or create this more often in their daily work life? What is of real interest to your client—does the real motivating force in their life reside inside the organization (or are they looking for the organization to provide them with their own rock-climbing or wood-working experience)? What is the measure of success in their own life? With these questions, we are often effectively blending personal and life coaching with organizational coaching and executive coaching.

Economic Man/Woman and the Psychological Covenant

Whether speaking of hygiene or motivating factors, the modern emphasis on contracted exchange of services and benefits between the organization and employee is built on an economic model of man/woman. Both parties look to the fulfillment of specific needs that they hold independent of the other party. A manufacturing company needs skilled technicians who will remain loyal to the company for at least ten years, and skilled technicians need adequate salaries, decent medical health and retirement plans, and a setting that is conducive to gratifying work. A hospital needs dedicated and highly trained nurses, and nurses need job security, good salaries, decent childcare facilities, and an institutional commitment to continuing education and professional development services. Each party makes an independent assessment of the capacity of the other party to meet his, her or its needs. While the notion of psychological contract may accurately portray modern day organizations, it also contains the flaws that are inherent in the highly secularized, economically driven world of modern organizations.

First, a contract can be broken by either party; thus, there is no commitment (as there was in premodern times) to the ultimate welfare of the employee (on the part of the organization) or the ultimate welfare of the organization (on the part of the employee). Everyone is in it for himself or herself. This leads to the dissolution of community in existing organization and to the absence of community in newly formed organizations. There is no glue. There is no commitment that holds everything together, especially during difficult times. Given the accompanying tendency of modern organizations to become large and complex, it is no wonder that these institutions are now in trouble.

These organizations must move away from the secular and economically-driven notions of work to a model of work that is both secular and sacred. Such a model would embrace and more fully explore the notion of a *psychological covenant* rather than psychological contract.

The psychological covenant is not readily broken. It involves deeply felt commitments on the part of both the employee and organization. Furthermore, these commitments are made public and are usually enacted in some ceremonial form. Neither party can break a covenant, without the other party's permission. Thus, men and women in a covenant-based organization must work through their problems, rather than simply giving up and parting company. Covenants are based on sacrifice (as in the Old Testament covenant made between Abraham and Jehovah). Both parties are willing to give up a part of their selves in order for the relationship to work. This flies directly in the face of individualistic concerns. It speaks to the need for collective responsibility (the more feminine way of knowing) and partnership (the more feminine way of organizing) and to a relative de-emphasis on individual rights (the more masculine way of knowing) and dominance (the more masculine way of organizing).

As coaches, we are moving to a much more profound space when we begin to explore the psychological covenant with our clients. This is a life-long commitment – a deep yearning for purpose in life. Perhaps it should be called a spiritual covenant rather than a psychological covenant. Whether our client comes from a religious or more secular perspective, the kind of exploration we are doing with regard to covenant certainly moves both our client and ourselves into a spiritual realm. We need to be prepared for this passage if we wish to serve our clients as something more than economic man (or woman). When we ignore these deeper issues, our client might be spared some of the anguish – but might also be spared the profound insights that issue from an exploration of the psychological/spiritual covenant they have established (perhaps without much conscious awareness) with their organization.

BENEFACTORS

THANK YOU TO OUR AMAZING 2017 BENEFACTORS!

SueAnn Freeman has over 25 years of experience in employee relations, management, mediation, arbitration, salary and benefits negotiations, and coaching individuals, leaders, executives, and teams, on the conversations the have and how they make decisions. She engages clients in partnerships and processes to gain perspective, insight and skills in making critical decisions and holding important and sensitive conversations that gain desired outcomes.

She is a Certified Professional Co-active Coach (CPCC), Board Certified Coach (BCC) through the Center for Credentialing and Education; a Professional Certified Coach (PCC) through the International Coach Federation; a Certified Mediator with the California Lawyers for the Arts; Committee member for the Board Certified Coach Credential and holds a MA in leadership from Saint Mary's' College. In addition, she is a Leader Effectiveness Trainer (L.E.T.), MBTI and EQi2 assessor and Affiliate Member, Institute of Coaching, McLean Hospital, Harvard Medical School. www.ActiveCoachingTechniques.com

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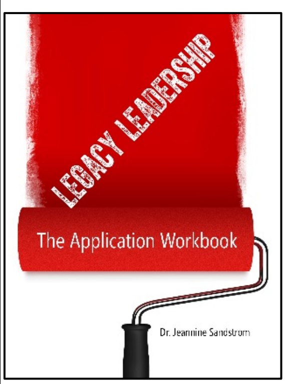
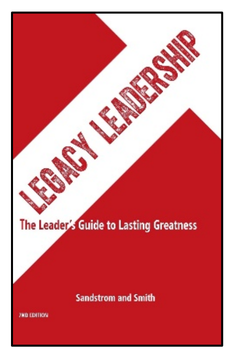
LEADERSHIP COACHING

Dr. Patrick Williams has been a leadership and wellness coach for 3 decades and one of the early pioneers in the coaching industry. Author of 6 coaching books used around the world and in many colleges and coaching schools, he has published his first book for a wider audience. Useful for coaches and their clients is his new book ***Getting Naked: On Emotional Transparency at the Right Time, the Right Place, and with the Right Person*** (**Ways to Uncover your Authentic Self at Work, Home, In Relationships and Life**). Get it today at Amazon and other sellers….also in Audiobooks, read by the author. Click on links on my website and sign up for my blogs as well. www.DrPatWilliams.com





Jeannine Sandstrom: Legacy Leadership is the guide for all leaders to achieve timeless greatness - and live their legacies today. It is a comprehensive platform of 5 Legacy Practices common in all great leaders. It is a philosophy, a model, and a proven process for bringing out individual best, developing leaders, establishing organizational leadership culture, and positively impacting the bottom line. It is a balanced approach to people and production. Legacy in leadership is not about leaving something behind. It is about influencing others enough to cause change, a shift from unconsciously doing leadership to consciously being a leader and living your legacy now.
Legacy Leadership: The Leader's Guide to Lasting Greatness is the new 2nd edition of the 2008 classic by the same *title (still also in print).* We have added a new comprehensive **Application Workbook** to accompany the new version of Legacy Leadership for those who want to apply these leadership tenets to their own leadership opportunities.
Dr. Jeannine Sandstrom, MCC is co-author of both books, and the principal of CoachWorks International, Inc., an organization with a reputation for providing premiere executive coaching at the C-Suite level.

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THE FUTURE OF COACHING

The Future of Coaching

The *Future of Coaching* is concerned with the very heart and soul of professional coaching—it addresses the challenge of coaching's future status, direction and long-term goals. It also offers the strategies and tools needed for this challenging future. Much as individual professional coaches assist their clients in focusing on their own individual future and the future of organizations with which they are affiliated and often lead, so it is important that the field of coaching itself address this fundamental coaching question: what will the future be for this human service field?

Background

The genesis of this digital magazine is to be found in a two-day meeting held in Santa Fe New Mexico during the month of November, 2012. Fourteen senior level professional coaches gathered together at the Santa Fe Conversation to talk about ways in which the field of professional coaching can be best nurtured. Sponsored by the *Library of Professional Coaching* (LPC) and *choice magazine*, the meeting produced some important insights and proposals regarding this nurturing process (many of which will be featured in future issues of this magazine). One of the proposals concerned the creation of a new digital magazine, hosted by LPC, which would focus on the future of coaching. About six months after the Santa Fe Conversations, the two of us, William Bergquist [WB] and William Carrier [WC], decided to collaborate on the founding of this new magazine, having both participated in the Santa Fe meeting. This is the first issue of the third LPC magazine. We hope *The Future of Coaching* [FOC] will have a long future, as the field of professional coaching itself evolves and changes over the years to meet new client needs and societal challenges.

Each issue of FOC will contain articles in most of the following categories: (1) articles based on research about coaching or based on some concept(s) related to the theme of the issue, (2) articles written about or by leaders in "partner" organizations that are concerned uniquely or extensively with the theme, (3) conversations (usually interviews) with professional coaches who are doing work that relates specifically to the theme, (4) conversations (usually interviews) with leaders of organizations who represent or are faced with challenges related to the theme, (5) tools of the coaching trade related to the theme, (6) strategies and tips related to running the business of professional coaching and caring for the soul of the coach (and clients) and (7) book reviews related to the theme.

While we recognize that there is quite a bit to do in producing each issue of FOC, we have already received considerable support from our colleagues at the Santa Fe Conversation and from many friends and colleagues who were not at the Santa Fe meeting. We are particularly honored to have the support of John Lazar, who, along with one of us [WB], founded the *International Journal of Coaching in Organizations* [IJCO]. While this wonderful journal no longer is being published (due in large part to the recent rise in costs associated with producing and distributing a high quality printed publication), we will be able to include articles from IJCO in their original form or as revised by their original author(s).

Issue One: Coaching Across the Generations

One of the central issues that emerged during our wide-ranging discussions in Santa Fe about the future of coaching concerned the challenge of coaching across the generations. There was actually two parts to this challenge. The first part concerned the challenge of coaching someone from a different generation than our own. Can a young person coach an older person? How much credibility does an older coach have when coaching someone much younger than themselves? Are there conceptual or emotional barriers between generations that make it hard to coach across generations? The second part of the challenge that was addressed in Santa Fe concerns the future of coaching within a generation – but outside the contemporary parameters of coaching during mid-life. Can professional coaching be successfully used with high school students? Is there such a thing as Kindergarten coaching What about coaching to those in their 70s, 80s and even 90s?

We have assembled a set of essays, interviews and thought-provoking questions that address some of these challenges and lay the groundwork for fertile discussions in many other settings regarding the future of coaching across the generations.

What's in Store for You: Contents of This Issue and Links to the Articles

We begin by offering a roadmap for our exploration. It was written by our colleague, Gary Quehl, as a roadmap for a study that one of us [WB] did with Gary about the role of emerging and senior leaders in community engagement activities (called the "Sage Project'). Gary offers a summary of the generational differences ("X-Gen" etc.) to be found in contemporary Western societies. While we all (including Gary) realize that these are very broad generalities that can easily be questioned, we also recognize that these intergenerational comparisons yield insights regarding not just differing assumptions about leadership, citizenship, responsibilities, change, etc. but also more specifically about what issues those who coach across generations and coach within nontraditional age groups are likely to confront:

The Social and Cultural Characteristics of Generational Age Groups

We offer two other roadmaps in our second and third essay. One is a brief overview prepared by one of us [WB] regarding the two foundational models of human development first presented by Jean Piaget and Erik Erikson:

Searching for Vitality: Coaching through the Lenses of Adult Development Theory and Research

The second essay offers even more detailed and related directly to the coaching profession. Written by Pam McLean, President of the Hudson Institute in Santa Barbara, California, it is reprinted from an issue of the *International Journal of Coaching in Organizations* (IJCO) that was devoted specifically to the topic of coaching across the generations ("Developmental Perspectives and Organizational Coaching"):

A Developmental Perspective in Coaching

Our fourth article moves directly to one of the issues discussed in Santa Fe: the challenge of coaching in a nontraditional age group. Written by Vicki Foley and one of us [WB], it explores the use of coaching in undergraduate and graduate education programs—coaching being a tool set that anyone might use in their life planning and in their own career within organizations, as well as being a peer-based service that young men and women might use in facing their immediate issues as someone who might be leaving home for the first time and might be facing the many demands associated with completing a collegiate degree program. This article also addresses the challenge associated with coaching young, high potential employees in contemporary organizations and suggests ways in which coaching might be engaged with even younger clients:

[Coaching the Young Client](#)

Our fifth article sustains the focus on coaching across generations that was discussed in Santa Fe: what about coaching to someone from a different generation? This article (like Pam McLean's) is reprinted from the issue of IJCO that focused on developmental perspectives. Written by Sandy Smith, this essay concerns her own work as a senior-level organizational coach with young men and women who are leading startup high tech companies. Smith offers a fascinating study of the opportunities facing anyone who is coaching across the generations:

[Gen Y Leaders, Boomer Coach](#)

We turn in the second half of this first issue of The Future of Coaching to several of the regular features we hope to provide in this magazine. First, we offer a leadership interview – in this case with a participant in the above mentioned Sage project. This interview is conducted by Gary Quehl with Norman Westmore, who is retired from a high level leadership position in a California Corporation, but is now providing just as important leadership in his new community located in the foothills of the Sierra Nevada Mountains in California:

[Senior Leadership in Community: Interview with Norman Westmore](#)

Another of our other regular features provides practical tips and insights regarding the practice of professional coaching as these tips and insights relate to the theme of this issue: coaching across generations. One of us [WB] offers a specific tool that can be used by coaches as they explore life and career transitions with clients who are moving through the distinctive developmental transitions of their own generation. Called Life Shields, this coaching tool seems appropriate whatever the age of your client:

Life Shields: A Coaching Tool

A third regular feature is our Bookshelf in which we briefly review and recommend a specific book that relates to the theme of this issue. We have chosen George Valliant's Triumphs of Experience, which is the capstone of a remarkable 70 year-long longitudinal study of men who had been students at Harvard University during the late 1930s and early 1940s. Filled with many insights about all stages of life (including the 70s, 80s and 90s), this book points the way to new work that might be done by coaches who wish to work with clients who are in their senior years:

The Book Shelf: George Vaillant, Triumphs of Experience

The last of our regular features centers on a series of Animation questions linked to the theme of the issue. Borrowing a tool developed by one of us [WB] for use with the International Consortium for Coaching in Organizations (ICCO), the Animation questions in the current issue focus on the implications of adult development theory for professional coaching practices:

Coaching Across the Generations: Questions to Ponder Based on Research/Theory

Coaching the Young Client

Vicki Foley and William Bergquist

Most of the professional coaching done today is with men and women who are in the midst of their lives—usually between ages thirty and fifty. Though we know of no formal study regarding the demographics of coaching that would confirm this statement, it would seem to be true, given our own experience as coaches and the experiences of the many other professional coaches with whom we have contact. The focus on mid-life is quite understandable. These middle-aged men and women typically can afford a personal or life coach if they are in the middle class. They are also likely to be provided with support from their organization if the focus is on executive or leadership coaching, given that these men and women are likely to be at the peak of their career during these middle years.

Typically, those who are much younger do not yet have the financial resources to afford a personal coach and their position in the organization traditionally has not been sufficiently high to motivate an investment in their professional growth through organization-based coaching services. A similar case can be made for those who are past midlife. They usually have been more concerned with saving for later life than paying for a personal coach, and their organization is likely to consider an investment in a coach as unwise, given the shorter future tenure of these older employees and their unlikely advancement to a higher leadership position at this point in their career.

We propose that all of this is now changing. Young people in many fields are making very good wages. There is also an increasing interest among organizational leaders in the development of young employees—especially (as we will discuss later in this article) those who have been identified early on as "high potential". We also find that the length of active careers among older men and women are rapidly extending. Most of these late mid-lifers can conceive of an active life that continues well into their 70s. There is still much time for coaching and career transitions. With this extension in career length and recognition of the frequency with which mature men and women change careers, there is an emerging recognition that professional coaching can be a wonderful investment for any organization to make, given that their mature employees are likely to be working for many years.

We would suggest that an even more important factor is at play—or should be at play. If professional coaching is for people in transition and for employees who work in organizations that are in transition, then coaching of men and women from all generations should be an imperative. After all, the young adult is certainly in transition and increasingly the mature adult is transitioning to a second (or third or fourth) career and is coping with newly emerging expectations regarding the active life to be found during the later years of life. While we could focus on the challenge of coaching older adults, we will focus in this brief essay on the challenge (and opportunity) of coaching the young adult.

The Opportunity

The absence of much coaching for young adults was vividly displayed in a recent experience that one of us [WB] had while traveling to a conference in California.

> A young woman volunteered to pick me up at the Los Angeles airport. She drove me to a speaking engagement about coaching. Given the heavy LA traffic, we had plenty of time to chat. She mentioned that she was finding it hard getting clients since she was only in her mid-20s and looked even younger. I suggested that she could consider setting up a specialized coaching practice working with young adults perhaps enrolled in a college or graduate school or working in a start-up high tech business. We talked about TGIF get-togethers at the end of a busy work or study week. Young men and women could be introduced at these

gatherings to the idea of coaching. Some of the young people might be trained and certified as peer coaches. My youthful driver became quite animated and offered many other ideas about how to market coaching to other people her own age or younger. She was very excited about this prospect. I don't know if she followed through on this or not, but it certainly got me thinking about the opportunities in marketing to and working with this younger population. I began to regret that I wasn't still in my 20s!

In the case of this aspiring coach there was the challenge of being young herself. Young coaches usually do not have much credibility with older clients. Much as in the case of the young psychotherapist, there is an age bias in the field of professional coaching. It is a bias against youth rather than in favor of youth. Most coaching (and therapy) clients want to work with someone who is of the same age or older. This young woman in Los Angeles, however, may have considerable credibility (or at least a shared perspective) with young clients.

Coaching the Upwardly Mobile

There are indeed many rich opportunities for significant work with young middle-class clients. Many options await these potential coaching clients. They are not restricted to a specific career option or a limited range of career options, as was often the case with earlier generations who were confronted with "identity foreclosure" (a limited set of options determined by their parents, their society or their socio-economic status). Given the challenges associated with this freedom of career options, there is the need for coach-assisted values clarification, priority setting, career planning, etc. Without this coaching support, there is likely to be an "escape from freedom" on the part of young adults. This escape can lead to poor career choices, wandering through many short-term jobs, or falling back into a job or career that meets family or societal expectations (based on gender, race, or socio-economic level).

Coaching the Underground

Professional coaching also makes sense regarding work with young lower middle class clients and others without a job or very good prospect of a job. We wrote several years ago about the *organizational underground* that is filled with underemployment, unemployment and despair associated with loss of hope and opportunity (Foley and Bergquist, 2010). Unfortunately, this underground has grown even larger since we wrote about it. Jennifer Silva (2013) has recently reported on her studies regarding the "coping" of many young men and women. Her work is reminiscent of Lillian Rubin's (1992) classic portrayal of lower middle class lives in *Worlds of Pain*.

While there is considerable need for coaching that is offered for those young clients living in the organizational underground and seeking to cope with a non-supportive world, we will focus in this essay on those young people who are hopeful--and justifiably so. They are the potential young clients enrolled in graduate schools and those identified as high potentials by leaders of their organizations.

Making It Happen I: Coaching in Graduate School Programs

Within the last five years, we have seen a significant increase in the number of graduate schools integrating coaching skills into their curriculum and providing the opportunity to work individually with an executive coach throughout the graduate program. The use of coaching in graduate programs, particularly MBA and Executive MBA programs, started as a value added competitive advantage for some programs, while others recognized the impact that coaching would have on the success of their graduates in program and post program because the Deans or faculty had experienced coaching themselves or, in some cases, were executive coaches.

Coaching in Management Schools

One of us [VF] worked extensively with a university whose Executive MBA program includes 32 hours of coaching over 21 months for each student. We found that this university was a pioneer in integrating coaching on many levels into a business graduate program. We might describe it as "deep and wide" coaching. The objective of the coaching is to be a catalyst of change in the lives of the participants, using an integrated systems approach to learning. The coaching is applied in multiple delivery modalities. For example, individual executive coaching with an assigned coach is offered to facilitate the transformation of the emerging executive leader. Learning cell coaching reinforces critical reflection, inquiry and questioning, problem solving and decision making, and reinforces the team formation and performance model.

Classroom-based coaching integrates classroom instruction and key learning points with practical application for the participants in their organizational roles. Finally, self-directed peer coaching in small groups builds relationships, enhances problem solving, and provides support. The selection process for the executive coaches includes coach certification, diversity in terms of industry, functional expertise, and diversity of gender and ethnicity. The coaches participate in an extensive orientation process which includes meeting with the faculty to understand course content, key learnings objectives, and expectations of the coach and the participant. In addition to the coaching components, the curriculum includes an executive conversations course to teach the students core coaching skills such as listening effectively, envisioning new possibilities, exploring assumptions, and giving and receiving feedback.

We can offer several other examples where coaching is used effectively in a graduate school setting. As described in its literature by the Wharton School of Business (University of Pennsylvania), the MBA program at this prestigious institution provides coaching and mentoring to students in two applications using second-year Leadership Fellows in two ways: (1) facilitating quarterly learning team feedback sessions, provide coaching and help solve team conflicts; and (2) coaching first year students in their leadership development. We would expect that using second-year Leadership Fellows in this capacity has a dual objective as the first-year student receives the benefit of the coaching and the second-year student increases his coaching and facilitation skills.

Graduate program coaching is not limited to the United States. We have seen an increase globally as well. INSEAD's global Executive MBA programs have included coaching for many years. The program includes a full day of group coaching that begins the coaching process. Students receive feedback on several leadership assessments. Small group coaching (provided by an executive coach) is a core, clinical approach that helps students go beyond the feedback. After the group coaching day, students continue with individual coaching sessions, self-directed group coaching sessions, and a peer exchange where pairs in their locations observe each other in their daily work and provide feedback. Within the curriculum students participate in teaching sessions where they practice the role of leader as coach. The coaching success and impact are measured on a 5 point scale based on student feedback regarding the coaching and teaching sessions.

Potential Coaching in Professional Schools

Clearly, coaching services are becoming more common in graduate schools of management. This is quite understandable given that professional coaches are being engaged with increasing frequency by managers and other organizational leaders throughout the world--so why not begin providing these services even before the young man or woman enters the workforce. We also know that effective coaching skills are critical for leaders at all levels in organizations--so why not teach these skills to young men and women while they are still in graduate school.

We would also suggest that coaching services should be provided in other graduate programs that prepare young men and women for lives in specific professions. Professional coaches are now being used extensively by dentists, veterinarians and other professional service providers (usually providing these services along with consulting services as *practice management specialists*) Doesn't it make just as much sense for these professionals to receive coaching services while still preparing in graduate school for their careers as dentists, veterinarians, lawyers or accountants? What about medical schools? Shouldn't coaching be provided to medical students as they face the complex, turbulent and changing world of health care? (Cassatly, 2010; Cassatly and Bergquist, 2012).

Making It Happen II: Coaching the High Potentials in Organizations

Another area where we are seeing increased investment in coaching is for early career high potentials. Organizations recognize the importance of developing and retaining critical talent not only at the mid and senior leader levels but also for new professional entrants that are the future of the organization. While we aren't seeing a significant investment in the more traditional individual coaching engagements, we are seeing significant investment in programmatic development offerings that include coaching components (much like the graduate school design). The man or woman showing great promise often will be given the opportunity to participate in leadership or managerial development programs – this is a frequent component of "fast-track" programs.

Focus on Unique Strengths

Something more, however, is operating with the high potential. This coaching often focuses in particular on the high potential's strengths and on the leveraging of these strengths for the benefit of the organization. The high potential typically possesses some distinctive abilities that are not easily learned by or "trained into" the average manager or formal leader. The high potential, metaphorically, is a race horse who should never be strapped to a plow.

We have discovered that there are additional strategies that have been or should be engaged when addressing the distinctive challenges of working with young, high potential employees: flexibility, reflection, alignment, experimentation and career planning. We have benefited in this strategic analysis from perspectives offered by a group of experienced professional coaches in Istanbul Turkey with whom one of us [WB] worked in collaboration with Dorothy Siminovitch. (Bergquist and Siminovitch, 2010)

Flexibility

While organizational coaches must always be flexible in their work with colleagues, the challenge of flexibility is particularly important when working with high potential clients. High potential coaching clients are inclined to assume an internal locus of control. They tend to "take charge," even when interacting with their coach. This means that the coach must move with the client. These clients set the agenda and shift from session to session with respect to the issues they want to address and the way in which they want to work with their coach. This also means that a coach must often encourage their clients to find their own solution to the issue being addressed. While all coaching should focus on client-generated solutions, this orientation is particularly important when working with the high potential client. The coach must therefore be flexible and responsive with regard not only to a client's definition of coaching issues, but also solutions being generated by the client in response to these coaching issues.

This flexibility and responsiveness comes with a caveat. On occasion, a coach must take a firm stance or at least a persuasive attitude with regard to the client's issues and ways of working in the coaching relationship. High potential clients want to believe in their own ability to resolve the issue using their own expertise and energy. The coach must, at times, challenge the client to recognize the complexity of the issue being faced—such that it will only be successfully addressed with the assistance and support of other people—because the client is unaware of the need for more information and the creative benefit of dialogue. In conjunction with an internal locus of control (so familiar to these clients), an external locus of control must be acknowledged if the coaching issue is to be confronted in a realistic manner. Thus, flexibility on the part of the coach must at times be tempered with a dose of coaching persistence and confrontation.

Reflection

The high potentials are probably already performing above expectations and are ready to excel in their current job or in a new job. The high potential clients might be encouraged by their coach to pause for a moment to reflect on the reasons why they are considered to be above-expectation performers. High potential employees are often worried that they can't meet the expectations—they might be "found out" and be a disappointment to people they wish to impress. The coach can be supportive by being empathetic, and by assuring these clients that it is common for high potential employees to be concerned about their future performance. In coaching a high potential, the coach must be able to assist their client in facing uncertainty with imagination and best practices.

Sometimes, an organizational coach must be ready to assist in the identification or definition of results. The client can benefit greatly from articulate statements from the coach regarding what successful results look like in a specific organizational context. Results are congruent with the culture of the organization and with the tactical or strategic plans of the organization. At other times, the organizational coach asks the provocative questions that challenges the client to be more thoughtful about the results she wishes to achieve or is already achieving: "How will you know that you have been successful?" "How will other members of this organization interpret the outcomes of your work?" "What are the short-term and the long-term implications of your successful performance in this organization?" These provocative questions often lead the client to be more grounded in the real world. The questioning of the coach often turns to the even more basic issue: "What exactly are the expectations of this organization regarding your performance?" For the high potential client, an even more specific question might be: "Why do you think you have been identified as a high potential employee?" The answer to this question may say something about the values of the organization and about the alignment between these organizational values and those held by the client.

Alignment

The challenges of work/life balance and workaholism are often wrapped up in the young, high potential clients' inability or unwillingness to identify all of the priorities that are operating in their life. To what extent are the intentions embedded in their work life aligned with the intentions embedded in their personal life? When they spend that extra four hours at the office or bring two hours of work home with them every night, are they damaging their family life? What about devoting time to their own restoration? As Roger Rosenblatt has noted, the appointment we are most likely to cancel is the appointment we have made with ourselves (healthy exercise, an unhurried lunch, an evening spent with a novel).

There are also the alignment issues associated with ethics and organizational values. Are there times during the coaching session when the coach and client should explore the extent to which the client's exceptional or potentially exceptional performance is misaligned with specific organizational values or with fundamental ethics? Do the ends always justify the means? Are the client's personal values aligned with formal organizational values or with the unacknowledged values that "really" operate in the organization? While being very busy and very successful (or potentially very successful), has the client spent sufficient time reflecting on these deeper issues? Is it appropriate for the organizational coach to challenge the client regarding these alignment issues? Youthful high potential clients are likely to ignore this misalignment, having focused their attention and energy on getting the work done rather than on the reasons why their work is of value to themselves and their organization.

Experimentation

Young high potential employees are often risk-takers. They like to leap over the cliff, and are confident about their own ability to fly when leaping over that cliff. They set the bar high and find *flow* (Csikszentmihalyi, 2008) by progressively moving the bar upward. This also means that these clients sometimes take the wrong risk and not only crash themselves, but also bring other employees down with them. Alternatively, they may often expect their co-workers to be risk-takers or make great demands on other employees in order to tackle unrealistic goals. The high potentials often do not pay sufficient attention to reality—and when they leap off the cliff, they do so without knowing how far they will fall or the size of their parachute (or even if they have a parachute!).

Under these conditions, the coach can be very helpful by encouraging and guiding the client in the identification of and planning for a responsible and reasonable risk. This often means that the coach helps the client set up one or more possibilities for "experiments"—pilot testing a new idea, running demonstration projects, creating a "sanctuary" in which new ideas can be moved to action in a manner that allows for "safe risks" and encourages organizational learning (Argyris & Schon, 1978; Senge, 2006). The coach might ask: "Where can you safely test out this idea?" or "What are some ways in which you can learn much more about the feasibility/practicality of this idea?"

Career Planning

One of the greatest challenges we see with young, high potential employees is managing expectations. When an early career high potential completes a one or two year program, what's next? Many are asking, "When will I be promoted and what is my new compensation package?" Expectations of a rapid and vertical career trajectory are common and create dilemmas for the high potential, the organization and the coach. We know that organization hierarchy has shifted to wider spans of control creating flatter organizations and limiting talent mobility. There is an additional factor that compounds this challenge: as we noted earlier in this article, older employees are staying in place and working into their 70s. This is wonderful for the older employees (unless they are working longer because of economic insecurity). For the younger workers, these extended careers are talent blockers.

For these reasons, we have found that coaching in early career is most successful when an element of career coaching is included. For example, coaches can help their young clients understand the importance of perception and managing their reputation. We have found in our work with this population that very often they do not seek out feedback nor realize the importance of doing so. In addition, because individual coaching is limited at this level, it's almost a necessity in their early career to build their own "board of advisors" for mentoring, introductions, and increasing visibility within the organization and within their professional network.

Coaching and developing the early career high potential comes with a unique challenge--the "busyness" of the early career life. Ed Franzone, Director of Worldwide Learning and Development at BD (Becton Dickinson), designed BD's early career high potential program. He tells us that the high potentials are facing the, "busy time of their lives--marriage, babies, buying homes for the first time. This influences their self-perception regarding mobility. People who check the box saying they are geographically mobile will have many more opportunities if they truly are." This is an area where alignment coaching (discussed earlier) can be an appropriate coaching technique.

Franzone continues, "Unlike their mid or late career counterparts, early career high potentials have a healthy dose of skepticism regarding experts. They usually like to collect data from experts, then talk among their peers to validate the data. They need multiple data points for anything they learn." Working with a younger coach who is "like me" could serve this population well and supports the opportunity of advancing the coaching profession with new entrants.

"This group of people tends to be impatient and have high expectations at the rate of which they will advance through the organization, which was not tempered as a result of the economy," states Franzone. The coach would serve the individual well by reframing career options to include lateral movement. This approach is aligned with the new world of work where gaining breadth of experience (potentially through a lateral move rather than a vertical move upward) is critical to future success. This breadth of experience should position the early career high potential for significant vertical movement by mid career. A coach to the young high potential client should keep this approach in mind.

Another aspect of coaching the younger client is her readiness to be coached. Brendan Geary, Area Head of HR USA for Panalpina, a global provider of end-to-end supply chain solutions, has been coaching early career high potentials for many years. Geary observes that the coach has to play a role in generating the coaching topics, what he calls "helper mode" instead of coach mode. Geary links this need for the generation of topics to the transactional work that many of the high potentials are involved in on a daily basis. Geary has found that when the coaching conversation is architected around "task, relationships (360), and aspirations, "the younger client becomes more engaged in the coaching, while increasing self-awareness and perceptions of self by others. Over time, when the high potential becomes involved in challenging projects and solving complex problems, she is able to identify coaching areas that are meaningful to her development. It is here where Geary can revert to coach mode and have impact on the development of younger high potentials.

Concluding Comments

In this essay, we have tried to make the case for extending the demographic range of professional coaching to those who are older than the typical current client and, in particular, to those who are younger. We have focused in particular on young adults who are in graduate school or are working as high potentials in organizational settings. What about those potential clients who are even younger? There are now "learning coaches" in colleges who assist students with their study habits, retention of information, analysis of complex academic themes, and, even more basically learning how to live away from home (if they are enrolled in a residential college or university).

Can professional coaching extend to an even younger age? Wouldn't high school students benefit from a "learning coach"? What about training young men and women to be peer coaches in a high school setting? Can coaching be of value when addressing the problems of bullying in junior high schools and high schools? Can coaching be of value in reducing the rate of drop out in many high schools? What would coaching look like with children in elementary school? Two of our colleagues, Jeannine

Sandstrom and Lee Smith, had their remarkable leadership training program (Sandstrom and Smith, 2008) revamped for use with students in elementary school--and it works!

So the demographic challenge is there. How young can a client be if they are to benefit from professional coaching? What might this coaching look like and what issues might be most effectively addressed through a coaching process. Perhaps, as a colleague of ours in Asia has noted, professional coaching is a bit like having an uncle or aunt (rather than a parent) assist us in addressing the issues we face as leaders. Maybe the older coach serving young people is like having a wise aunt or uncle. Perhaps the youthful peer coach is like a wise (or at least empathetic) brother or sister. Couldn't we all have used this type of wise and empathetic counsel when we were young!

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Issue Two: Here Be Dragons: Exploring the Terrain of Professional Coaching Research

There's a lot of territory left to explore and even more for us to finish mapping.

When the New World was explored and settled, a host of nations and peoples found different things—forests, lagoons, deserts, wintry northlands, sunny southern climes, flatlands and microclimates (not that they called them microclimates back then). Many times settlers wouldn't range far and, even for explorers who never stopped, it could take decades to travel a region well. They'd share their discoveries and document them, mapping the New World much as the Old World had been charted. Where once, "Here Be dragons" was written, slowly but surely, the edge of what was known was extended.

Much as early explorers and cartographers, many of our coaching colleagues are in the process of redefining the boundaries of coaching. We've been sailing from an old world of Personnel—where "here be dragons," might have included the dangers of anything actually personal showing up at work—to a new world of self- and organizational leadership, integrated and with integrity.

As individual coaches, we learn well what works for us—we settle our certain tracts and explore the regions nearby—but there are only so many clients we can see in a day, a year, a decade; there are only so many opportunities and problems and solutions we can discover, explore and document with our clients. We build our own maps of what works and for whom through personal experiences. Many of us learn the area in which we work so well that we become guides for other. In some cases, we share our understanding and, collectively, it creates a clearer picture of the place our profession has settled.

We have so many pioneers and singular settlers, however, and so many people who are busy building forts and tilling souls, that our documentation remains vastly incomplete. The terrain of our work from our collective perspective remains largely unknown…and so we remain uncertain: are there still dragons out there?

We write in this and our next issue of our common effort in the cartography of coaching: the research which underpins the workings of our efforts and highlights the performance of our profession. In this first of two issues on the systematic effort to document coaching, we'll address research in and about coaching both historically and conceptually—we'll cover the terrain rather broadly. In the second issue, we'll dive deeper into certain subjects and look into the future of professional coaching research.

In compiling this first of two issues of *The Future of Coaching* on research, we have taken a metaphorically appropriate effort to look at where we are, where we've been, and where we are going with respect to research on professional coaching. We first look at the state of research today and are delighted to offer an insightful interview on this topic conducted by one of us [BC] with a leading figure in the field of coaching, Lew Stern. As a practitioner with a scientific background, Dr. Stern outlines many of the accomplishments and challenges associated with research in coaching. We follow the Stern interview with an essay written by one of us [BB] that parallels the focus of Stern on the challenges and promises of coaching research—to a certain degree, exploring not only where we are but also where we are not. This second essay probes broad issues concerning decisions about the type of research to be conduct and the sources of information about coaching that are identified when preparing a coaching research project.

Also in the spirit of where we are, we are grateful to be able to share the survey conducted by the Sherpa Consulting Group regarding the current status of professional coaching as identified by respondents to a worldwide Sherpa survey. We are presenting the latest (2013) report.

In taking a look at where we've been, we next offer impressive examples of coaching research that have been conducted in recent years. Outcomes of the first research project were reported in 2006 by members of the Cambria Group (Derek Steinbrenner, Ellen Kumata, and Barry Schlosser). As one of the most widely acclaimed reports in the history ofthe International Journal of Coaching in Organizations (IJCO), it was republished in 2010, with a brief commentary written by the original authors. We have reprinted this report with the subsequent commentary. The Cambria study exemplifies research that focuses on coaching outcomes and the factors influencing successful coaching. We also have the insights offered by the Cambria authors several years after the initial publication of this IJCO article. We also look backward at an entire issue of IJCO that was devoted to research on professional coaching—with a particular focus on Return-on-Investment (ROI). This issue of IJCO was published in 2005.

As we are doing in all issues of *The Future of Coaching* we conclude with two very practical essays—one concerned with conducting the business of professional coaching and the other concerned with a review of literature related to the field of professional coaching (The Bookshelf). In this issue, we focus on the marketing of professional coaching and turn once again to an essay originally published in IJCO. We offer a unique perspective in this case, for we have not only the original article about marketing cycles written by Sheila Maher and Suzi Pomerantz [co-curator of this digital library] written in 2003, but also the commentary on this article written in 2010 by Maher and Pomerantz and a second, contemporary commentary prepared by John Lazar [publisher of IJCO] and one of us [BB] on this original article. In many ways these three different documents offer the reader an historical perspective on the field of coaching and the marketing of coaching—including three snapshots over an eleven-year span of time. If nothing else, it's an interesting look at the way the map of the same terrain may change over time.

The Bookshelf is also unique in this issue. We offer not the review of a single book, but rather an expansive bibliography on all of the peer-reviewed articles reporting on coaching research from 2008-2012—a crucial period of time following the International Coaching Research Forum (see the interview with Lew Stern for more on the Summit). This bibliography was prepared by Lew Stern (and his colleague, Sunny Stout-Rostron) in 2012 and serves as a wonderful bookend for this issue of *The Future of Coaching*: we begin with a Lew Stern interview and end with his exhaustive bibliography on coaching research. We hope you find these diverse offers to be of value to you in your own endeavors as a professional coach or user of coaching services.

This issue of The Future of Coaching is dedicated in memoriam to our dear colleague, Gordon Lee Salmon (1942-2014)

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Bibliography of Coaching Research: List of Journal Articles by Focus Area, Date and Author

By Lew Stern

We recently wrote an article for the journal Coaching: An International Journal of Theory, Research and Practice. That article explores the extent to which the research focus areas of the 100 research proposals generated by the International Coaching Research Forum (ICRF) in 2008 have been addressed in substantive, primary, evidence-based research (Stern and Stout-Rostron, 2013). The purpose of this list of articles is to allow coaching researchers, practitioners, clients, and others to find coaching research articles which meet the criteria described below. This list is ordered by coaching focus area, date and author.

In September 2008, the International Coaching Research Forum (ICRF), consisting of internationally recognized researchers and coaching professionals, met at Harvard University to produce 100 coaching research proposals which could be accessed by stakeholders worldwide to advance coaching as an evidence-based discipline (Kauffman, Russell and Bush, 2008). We reviewed the 100 coaching research proposals produced by the ICRF, and prepared a list of the 16 main focus areas in which they recommended research. We identified these 16 areas based on a categorical aggregate of themes emerging from each of the proposals, and by reviewing the frequency of questions and topics within the 100 proposals.

The purpose of our article was "to explore what evidence-based research has been produced since 2008, reviewing abstracts of peer-reviewed journal articles published to date in our global and collaborative effort to share ideas, expertise and advance a more disciplined and rigorous field. It is important to note that our compilation of abstracts, while wide-ranging, is not a definitive 'global' anthology. It is based on the available English-language, peer-reviewed journal articles found on the web, from journals published primarily in the USA, the UK, Australia, Canada and South Africa (Stern and Stout-Rostron, 2013:2). We analyzed the number of research studies to discover the relative degree to which each of the 16 ICRF focus areas were studied, how those numbers were changing over time, and which disciplines had peer-reviewed journals publishing coaching research during this time.

Our criteria for including journal articles within the scope of our study (including those we selected from the Grant (2011) bibliography) were as follows:

* English-language, peer-reviewed journal articles focusing on coaching research, published from 1 January 2008 to 30 June 2012.

* Primary research or research whose purpose is to identify best practices available to coaches without restriction to proprietary techniques; research to identify the who, what, where, when or how of coaching through empirical or qualitative studies; original research or an attempt to replicate previous research; testing hypotheses or null hypotheses; or an attempt to answer questions about the practice of coaching related to who does the coaching, who is coached, under what circumstances, using what approaches or processes, with what results, primarily regarding coaching and research conducted using recognized standards and scientific methods.

* Research on sports coaching is not included.

* Any articles in which the authors simply express opinions, comments or promotional expositions have not been included.

* The details of over 450 journal articles were located, of which approximately 190 were excluded because they did not meet the above criteria, leaving 263 journal articles.

The articles we have included in the following list meet all of these criteria. The list is organized by the 16 focus areas from the ICRF proposed research. Within each of the 16 areas the articles are ordered by date and then by author(s).

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Stern, L., and Stout-Rostron, S. (2013). What progress has been made in coaching research in relation to 16 ICRF focus areas from 2008 to 2012? Coaching: An International Journal of Theory, Research and Practice (DOI:10.1080/17521882.2012.757013).

1. Focus Area 1: Coach education and training

1.1 2008

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1.2 2009

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Spaten, O.M., and Hansen, T.G. (2009). Should learning to coach be integrated in a graduate psychology program? Denmark's first try. The Coaching Psychologist, 5(2), 104- 109.

Wood, B., and Gordon, S. (2009). Linking MBA learning and leadership coaching. International Coaching Psychology Review, 4(1), 87-104.

1.3 2010

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McCarthy, G. (2010). Approaches to the postgraduate education of business coaches. Australian Journal of Adult Learning, 50(2), 323-356.

1.4 2011

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1.5 2012

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2. Focus Area 2: Coaching relationship

2.1 2008

2.2 2009

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2.3 2010

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2.4 2011

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2.5 2012

3. Focus Area 3: Coaching outcomes

3.1 2008

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3.2 2009

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3.4 2011

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4.2 2009

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4.3 2010

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4.5 2012

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11.3 2010

11.4 2011

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12.2 2009

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13. Focus Area 13: Contracting

13.1 2008

13.2 2009

13.3 2010

13.4 2011

13.5 2012

14. Focus Area 14: Coaching readiness by the coachee

14.1 2008

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15.1 2008

15.2 2009

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16.1 2008

16.2 2009

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16.4 2011

16.5 2012

Issue Three: We Invite You to Make a Mess: Enhancing Research Regarding Professional Coaching

We need to know more about what we are doing as professional coaches working in a complex and highly dynamic environment. This third issue of *The Future of Coaching* (like the second issue) is devoted to addressing questions associated with this knowledge gap.

Francine Campone: Real World Coaching: Real World Research

Leslie Evans and Vance Caesar: Survey of Current Themes in Coaching Research with a Methodological Critique

Jonathan Sibley: What is Coaching? What Isn't Coaching? Where are the Boundaries?

William Bergquist: Evidence-Based Coaching--Does the Evidence Make Any Difference?

Margaret Cary: Coaching in Medicine

William Bergquist: The Revised Balint Method--A Powerful Tool for Reflecting on Professional Coaching Practices

The Book Shelf: Books in the LPC Writer's Cottage

The challenge is significant. Using a term that Donald Schon applied many years ago, valid and useful research on professional coaching will inevitably be "messy." We can't do tidy, controlled experiments in a university laboratory when seeking to find out what makes professional coaching work (and not work). We don't get to run multiple trials in clean rooms to see what makes particular coaching strategies effective (or ineffective) in addressing specific issues that are being presented by a coaching client. Life and business—and the need to provide first for the client, not the research—don't work like that. Together, we need to make a mess—but a purposeful, organized mess, the kind of mess that, in accumulation, actually clears things up.

Ample research has been conducted on professional coaching – as evident in the extensive list of publications cited by Lew Stern and Sunny Stout-Rostron in the second issue of *The Future of Coaching*. Their list contains only those articles and reports that are peer reviewed and published in major journals. There are many more that have been published in other journals, in books and on many websites. The problem (and challenge) that we are pointing out is not in the quantity of publications. It is not even in the individual quality of the work involved (which, of course, ranges broadly). It is the collective quality of work being done in producing the results being reported.

This is not meant as a critique of the work that has been done to date, for as mentioned above, we are facing the challenge of "messy" research that is being conducted in the field rather than in a laboratory. To exaggerate the problem in metaphor (which is likely a literary double-murder): It's as if we are trying to complete a picture in a connect-the-dots book—but we keep turning pages every time we connect a pair of dots. We're making headway, sure, but never on any one picture enough to resolve it to an image that makes sense. As one of us [WB] noted in an essay published in a previous issue of *The Future of Coaching*, the challenge is even more nuanced and complex. Who is determining the type of study being conducted, the nature of the evidence being collected, the criteria for determining effectiveness or motivation? The answers to these questions in turn shape the research questions themselves. To push our metaphor even farther—sometimes we aren't even using the same book.

Specifically, we suggest that the answer may have to do with establishing a common set of paradigms and a database that is sufficiently large and diverse to warrant conclusions that are robust (if not definitive). We are in need of some kind of taxonomy or at least stable set of terms and definitions so that the findings are anchored in a base of shared understanding among those working in the field (as professional coaches, trainers of coaches, coaching authors, and those doing the research). This is about taking up the next stages of the work of the International Coaching Research Forum and the Dublin Declaration.

Research on Coaching: Five Articles

As we did in Issue Two (with the Lew Stern interview), we turn first to the wisdom and recommendations offered by one of the major researchers in the field of professional coaching: Francine Campone. She comments on what it takes for good research to be done, describes what a "culture of research" would look like in the field of professional coaching, and offers a brief case study of her own work with several colleagues (based on the remarkable, collaborative research on psychotherapy led by David Orlinksy at the University of Chicago). Francine's study (Campone and Awal, 2012) focused on the reasons why someone would enter the field of professional coaching and is based on results from a survey completed by more than 170 coaching practitioners.

Francine Campone: Real World Coaching: Real World Research

As the co-editors of *The Future of Coaching*, we not only commend the work done by Dr. Campone and her colleagues, we have also joined with the Library of Professional Coaching (LPC) in a commitment to extending her study--by gathering additional data (using her survey questionnaire) and initiating comparable studies on other aspects of the coaching profession. We will soon be announcing further details regarding these additional studies and will be inviting our readers and the users of LPC (and their colleagues) to complete the survey.

We turn next to both a look backwards and a look forward regarding research on coaching. Our look backwards is to a 2005 article prepared for the *International Journal of Coaching in Organizations* by one of the pioneers in the field, Vance Caesar, and his colleague, Leslie Evans. They review then-current themes in coaching research and offer a methodological critique. As we consider their work (written almost a decade ago), it is worth asking: (1) how have we done since 2005, (2) have their methodological concerns been adequately addressed, and (3) what might a review in 2014 look like? While the field of professional coaching (by many accounts) is still in its early adolescence, there is already a history that must not be ignored if we aren't to repeat the same mistakes.

Leslie Evans and Vance Caesar: Survey of Current Themes in Coaching Research with a Methodological Critique

As we look to the future of coaching research, there are several fundamental concerns that must be addressed. First, are we even clear about what the term "professional coaching" means and doesn't mean? What are differences in the definition of this term and what coaches actually do? Jonathan Sibley has conducted research on the ways people in the field conceive of coaching and he writes about his research in this issue.

Jonathan Sibley: What is Coaching? What Isn't Coaching? Where are the Boundaries?

One of us [WB] pushes even further in the fourth article, asking: Do research findings make any difference? Our readers are invited to consider ways in which research outcomes are actually influencing coaching practices. Could the research findings be more influential with regard to professional coaching practices if we were engaging all four of the major knowledge-utilization strategies described in this article?

William Bergquist: Evidence-Based Coaching--Does the Evidence Make Any Difference?

We conclude the main section of this *Future of Coaching* issue with an example of the use of coaching research in a specific field where research findings are taken quite seriously: medicine. Maggi Cary, who is both a physician and professional coach, describes some of her experience and offers insight regarding the importance of leveraging research in the actual coaching conversation. Maggi finds that hard research on soft skills can be compelling support for behavioral change in leaders who are taught to be skeptical of opinion.

Margaret Cary: Coaching in Medicine

Coaching Tool and Book Shelf

As we have done in previous issues of *The Future of Coaching* (and will do in future issues), the second section provides both a practical tool for professional coaches and a look at the coaching book shelf. Our practice tool in this issue is called the Balint Method. It is a tool that is most often used in the supervision of medical interns and in the reflection of senior physicians on their own ongoing, complex practices. We suggest that the Balint Method (as revised for use by coaches) can be of great value for professional coaches in reflecting on their own practices (in collaboration with their coaching colleagues) and in their work as a coach with client teams and groups. The Balint Method is also a superb research tool, yielding qualitative data regarding effective coaching practices--that is why we included it in this issue (with a focus on coaching research).

William Bergquist: The Revised Balint Method--A Powerful Tool for Reflecting on Professional Coaching Practices

The book shelf is a bit different in this issue. Rather that reviewing a specific book, we are opening the door to a significant new development in the Library of Professional Coaching (LPC). While LPC has been in the business over the past 6 years of providing an extensive digital collection of essays, reports and video clips, it is now also in the business of providing an extensive collection of printed books regarding professional coaching and related fields. Located on the edge of the Atlantic Ocean in the State of Maine, The LPC Writers Cottage provides a collection of more than 2,500 volumes that is available to those users of LPC who sign up as patrons of the newly-created 1K Club.

The Book Shelf: Books in the LPC Writer's Cottage

The LPC Writers Cottage will be used by coaching professionals and researchers who wish to spend several days or a week preparing articles, reviewing literature, or simply finding a lovely sanctuary where they can think and write. We open the door to the Writers Cottage for LPC users by providing an Excel spreadsheet in this issue of *The Future of Coaching* that is a partial list of the LPC collection. This list contains the books generously donated to LPC by Vikki Brock, the author of a major book on the history of coaching (title and link). In coming issues of *The Future of Coaching* we will provide additional lists of books in this extensive collection.

We invite our coaching colleagues to consider becoming a 500 club patron--which not only opens the door to our Writers Cottage, but also provides entry into the digitally-convened Writers Circle and free download of three substantial books on professional coaching. We also invite those who use the Writers Cottage to submit their work (in preliminary or finished form) to the two of us as co-editors of The Future of Coaching. We are looking for new authors, new perspectives, challenging critiques, and useful coaching tools. We are looking for help with our book of coaching connect-the-dots.

Come, make some mess. Please join us in ensuring that the future of coaching is secure--and filled with great promise and benefit.

What is coaching? What isn't coaching? Where are the boundaries?

Jonathan Sibley

As a coach, licensed clinical social worker, and researcher, I have been curious about the definition of and boundaries around coaching since I first started learning about coaching over 10 years ago. There are a number of definitions of coaching that have been circulated, without any clear consensus that any of the definitions is superior to the others. But if we can't agree on what coaches do, it seemed important to find a way to describe coaching so that we and future researchers would, at least, have a common language when talking about coaching.

So, in 2009, Tatiana Bachkirova, a professor and researcher at Oxford Brookes University in the UK, and I submitted a research proposal to the Institute of Coaching at Harvard University and were awarded a grant to develop an instrument that could be used to describe what happens in a coaching session – the Coaching Process Q-set.

Together with a student at Oxford Brookes, Adrian Myers, we developed an initial set of items to describe what might happen in a coaching session, keeping in mind the coach, client, and coach-client dyad. We were inspired by a series of research studies from the psychology process research literature. Enrico Jones had developed a set of 100 items to describe psychotherapy sessions and went on, with colleagues, to use these items:

to describe differences between psychotherapy approaches (descriptions of prototypes for various forms of therapy)

to explore differences between how psychotherapists said they practiced (e.g., expert cognitive-behavioral therapists vs. psychodynamic therapists) and the actual sessions of these therapists

to evaluate which items and approaches seemed to lead to better outcomes

Coaching is a relatively new field and the psychological process literature had a much longer history than the coaching process literature and we hoped to provide future coaching researchers with a tool that could describe coaching at a more granular level than previous approaches we had found.

We convened a group of expert coaches in the UK to explore and revise our initial list of items, followed by groups in the US and Canada. Each time, we incorporated the feedback we received from the group. Following this, we posted the list of items on the internet and gathered feedback from 207 visitors from 26 countries about these items. At this point, based on this feedback, it appeared that our list was reasonably complete and ready to be piloted.

Again, we turned to the internet to ask coaches to use our list of 80 items to describe an imagined, typical mid-engagement coaching session, putting each item into a bucket ranging from "most characteristic" of a session to "most uncharacteristic". Using a set of techniques called "Q methodology", 41 participants from 5 countries sorted the list of items online after which the researchers used a form of factor analysis across participants to see whether we could identify sub-groups of participants who described their way of coaching as similar to other coaches in the sub-group and as different from the coaching described by coaches in other sub-groups.

After analyzing the results, no clear subgroups could be identified. Although, of course, there was not complete agreement about the ranking of the 80 items, there appeared to be relatively strong consensus among the 41 participants about which items were most and least characteristic of a typical coaching session.

These items/themes were considered most characteristic:

A focus on the client's agenda, not the agenda of the coach or of a third-party

The coach pays attention to the client's overall goals and goals for the session

A sense of optimism empathy and rapport

A focus on exploration, including "questions to open new possibilities" for the client and, for many, an exploration of the client's mindset (beliefs and assumptions) and values, as well as an exploration of the client's resources (e.g., strengths, accomplishments, and/or external resources) and, to some degree, of the deeper meaning of a presenting issue

These items/themes were considered to be least characteristic:

Advice giving

Helping the client to deepen his or her emotions

Exploring the client's "apparent defensiveness" or "unconscious motives"

The coach sharing his or her own feelings and bodily sensations that are evoked during the session

The coach is verbose, uses an intervention mechanistically, coach and/or client interrupt one another

We chose to use the full list of 80 items for this pilot, although some of the items are likely to be more useful when used to describe an actual coaching session. The advantage of using the full list, particularly when items are sorted or ranked in comparison to one another, is that these results could be more easily compared to results based on using the same 80 items to describe actual coaching sessions. The disadvantage to using the full list is that items such as "coach is verbose" or "coach appears to be using an intervention mechanistically", while potentially important in describing an actual session, are likely to be ranked as least characteristic by nearly all coaches when they describe an imagined, typical session.

Although the results from this sample of 41 coaches did not allow us to distinguish clear subgroups of coaches and coaching styles, it is possible that future research involving more and/or different coaches would lead to different results. For example, coaches who practice eclectically, combining different methods and frameworks, may make it difficult to tease out subtle differences in coaching styles. Comparing a group of psychodynamic coaches to a group of gestalt or behavioral coaches might lead to clearer differences between those groups of coaches. It is also possible that some of the more seemingly apparent differences between coaching approaches involve the language and labels used by each approach. In attempting to remove "jargon" from our items, we may have removed some of the potential differentiators between approaches. At the same time, if the differences are, in fact, based more on language and labels than on what coaches actually do, this raises the question of how important these differences actually are in coaching sessions and outcomes.

Although we piloted using the instrument using Q methodology and participants sorted the 80 items into a forced distribution, future researchers might wish to use the same items (or a subset of these items) with ratings on a Likert scale (e.g., from -5 to +5) for greater simplicity and ease of use. It would also be interesting to evaluate the 80 items psychometrically to see how well these items reflect what is and isn't happening in a coaching session (or across coaching sessions) and whether the list of items needs any fine-tuning.

Going forward, we hope that this tool can be used in future research to better define and understand coaching, as well as by coaches, teachers, and supervisors to explore how coaches think about and practice coaching. Coaches involved in the development and piloting of the Coaching Process Q-set often told us that they found the process useful in thinking about their own coaching and we hope that this can help to move coaching research and practice forward as our field continues to mature.

Issue Four: The Profession of Coaching: Challenges and Culture

In this issue of *The Future of Coaching*, we look at coaching in the professions, expanding our base of knowledge with some reports from members of the medical and legal professions who serve as coaches, as well as experienced coaches who work with professionals and train professionals as peer coaches in the fields of dentistry and justice (judges).

One of us [WHB] begins this issue by offering a general framework regarding the nature of organizations that are established and run by professionals. He describes these as closely-held enterprises and writes about coaching professionals who operate as entepreneurs.

Theory E^2: Working with Entrepreneurial Professionals in Closely-Held Enterprises

We then turn to three articles written by professionals from two different disciplines who provide their unique perspective on coaching their fellow professionals. Dr. Margaret Carey returns to amplify her earlier comments on coaching physicians, and Dr. Michael Cassatley writes about his own experience as a medical professional and coach to physicians. Anna Rappaport, JD, debuts with an article about coaching lawyers.

Coaching Physicians

The Transformative Shift in Healthcare Compels Coaching

The Good, the Bad and the Non-Billable: The Reality of Coaching Lawyers

In addition to these practitioner perspectives, we're glad to offer two articles written by coaches who work extensively with professionals. Kathleen O'Donnell and Kimberly Brozovich reflect on their many years of experience as coaches and consultants (practice management) to dentists. Their essay is accompanied by observations made by one of [WHB] of Kathleen O'Donnell as an effective and appreciative coach. Jan Bouch completes this section of The Future of Coaching with her description of a very successful program being conducted in two court systems with judges being trained to coach and mentor other judges.

Practice Management and Coaching

Coaching Better Justice

We conclude this issue of The Future of Coaching with our usual Bookshelf and Coaching Tools. The bookshelf contains a review of Mark Ridley's The Rational Optimist, while the Tool Kit offers an overview of conflict styles, prepared by Ellen Kandell, a lawyer and coach. It is indeed fitting that we end with a tool offered by a legal professional.

The Book Shelf: Matt Ridley, The Rational Optimist (2010)

An Overview of Conflict Styles: A Coaching Tool

There is an important observation that underlies all of these essays on coaching to professionals: professions are cultures. They are groups of people who have created norms of behavior and established specific ways of action. Some of these norms and actions are explicitly stated—there are codes of conduct and ethics—and some of these are tacitly understood. Some may not even be consciously observed or intentionally enacted by the professionals—and yet they are common constraints and guides to action.

These professional cultures, like national cultures, require some additional adaptability by the coach. You might think of it as an added layer of complexity—not only do we need to have respect for the individual and his or her organization, but we also may need to do so for their profession. As one of our authors (Cary) notes, understanding the culture unique to a profession can be of great use in coaching.

Coaching Physicians

Margaret Cary, MD MBA MPH

How much of a coach's frustrated "What is it about physicians?" is generated by preconceived assumptions rather than by remaining curious? I am a physician and, as with most people, our views of ourselves and our beliefs in what we project to others may vary wildly with what people see.

We're a culture.

Before you visit another country, most of you read books and articles about the culture, interested in what is new and different in that foreign – to you – destination. The differences invite more exploration. What would it be like if you approached coaching physicians as if you were entering the Republic of Medicine?

In the rest of this article, I'll highlight a few of the troubles common to physicians based on our professional culture – as well as a few of the methods I've found especially effective in working with other physicians because of our culture.

Imposter Syndrome Infections

When I first finished my residency, I felt like a fraud (and thought I was the only one who felt this way). Soon enough I discovered that doctors have a high incidence of Imposter Syndrome. Ultimately, over time and with practice, we realize our training did prepare us and we can be competent clinicians. Sometimes, specific moments stand out.

During my year as an emergency department physician in a ski resort a woman came in with a sore throat. As I was working through the diagnosis, she stopped breathing. I remember her lying on the gurney, turning blue. I immediately shifted from the steady rhythm of a routine work-up to emergency mode – focused and fast. She required an emergency tracheotomy (making a hole in the trachea, or breathing tube). We had neither the equipment nor the specialists to stabilize her long enough to figure out what was going on. We loaded her into a helicopter, flying her from our rural town on the eastern side of the Sierra Madre to a fully equipped trauma center.

As I think back on this I recall traits necessary in an emergency situation. Clear, focused thinking and being calm in pressure-fueled situations are critical. I didn't have time to say, "Oh, I've never done this before. I don't know how to do it."

I still have the letter from that woman thanking me for saving her life. It's like penicillin to the infection of the Imposter Syndrome – not a cure-all but definitely a strong broad-range ego antibiotic.

Leadership Anemia

Managing a patient with only hypertension or managing a patient with only diabetes is much simpler than managing a patient with both conditions. Caring for patients, especially with chronic diseases and comorbidities requires a team. Some medications for hypertension are not recommended to be used in diabetics, and diabetics with hypertension may need additional medications. In such a case, the care team could include a primary care physician, a cardiologist, an endocrinologist/diabetologist, an ophthalmologist, a nephrologist, perhaps a surgeon, a diabetes educator and a nutritionist, each of whom *may* be communicating asynchronously with the others. Or not.

Hospital medical errors are now the third leading cause of death in the US. Poor communication is one of the leading reasons for preventable errors – often during the time when the care of a patient is handed off to the next physician or team.

Research bears this out. Skills important for physician leadership include managing the team, creating a vision, and communication. These are even among the required Core Competencies for Entering Medical Students. Yet, regretfully, the teaching of these Competencies may not be connected to the implementations, nor to the demonstrations, by the attending physicians who work with medical students from the clinical side. In other words, book learning isn't always congruent with on the job training.

Asymmetric Growths: Technical Focus Over Personal Growth

Where might we as physicians differ from non-physicians? In social skills we may be developmentally delayed. We focus on getting excellent grades at university so we are accepted into medical school. We then have to learn a new language in a year or two while we're meeting patients, introducing ourselves as "Doctor" and feeling inadequate (there's that Imposter Syndrome again!). When we are fully fledged doctors we jump directly into practicing medicine – into being the Expert – without having time to experience what it's like outside medicine.

During this time many of our non-physician colleagues are feeding us their admiration, whether real or acted. This external affirmation can combine with Imposter Syndrome in a toxic mix of arrogance and insecurity.

And then there's general Emotional Intelligence. Physicians may be deeply focused on understanding others in terms of making a diagnosis, but often not as relates to managing the relationships between patients and physicians. We may not have nuanced understandings of ourselves, nor understandings of how to manage our emotions and interactions with others. The authors of one article interviewed ten randomly selected department chairs and observed the following.

> Emotional intelligence and its concomitant skills are the most essential competencies for leaders to succeed in academic institutions. The ten chairs emphatically stated that this ability was fundamental to their success and its absence was the cause of their failures. They suggested that the absence of emotional intelligence often resulted in the demise of chairs and contributed to the high turnover among colleagues.

Need for Support to Change

Physician leaders cite emotional and psychological support as the most valued type of leadership training, with a "series of 'strategic' interactions . . . about specific professional issues rather than longitudinal mentoring." *Looking for targeted mentoring was more likely to be found in established physician leaders. Aspiring physician leaders often look for a single mentor.*

Coaching Interventions Particularly Useful with and for Physicians

The good news is that, just like there are some common troubles in the Republic of Medicine, there are some commonly effective interventions as a coach. My physician coaching practice focuses on the human side of leadership and management – e.g., conflict management, motivating others, team building, understanding and maneuvering through organizational politics, realizing and appreciating value and personality differences, negotiation techniques, and getting and giving feedback. These are all crucial leadership skills that are deeply affected by the traits I've observed above.

In common with other industries, medical organizations are often interested in goal-directed coaching, with measurable milestones along the way to meeting each goal. Goals were included in the Community of Champions, the leadership development and coaching program I envisioned and developed for the Veterans Health Administration. I encouraged participants to partner in organizational goals, justifying the time and money spent by their facilities on the program. In sum, they focused on the question: what is the measurable value you offer to your clients and their organizations? Here are some of the tools that help them achieve that value:

1. Role playing and reflection

Watching leaders in action shows physicians what works, and what doesn't. My clients find role playing and reflection to be a proxy for watching leaders. During role playing, it's easier to be in the moment with their emotions because they are in supportive, nonthreatening situations with a coach. (This returns us to the previously cited article wherein emotional support was the most valued activity provided by mentors.) Among other things, role playing helps my clients understand how others may respond to and feel about various actions.

Several months ago, one of my clients mentioned his new boss seemed eager to be done with their regular appointments, rushing him through with "I know, I know" and looking at his watch. My client looked at me, paused in a moment of obvious self-reflection, and said, "Oh. Now I get it." He was thinking about feedback I had given him during a previous session when I shared my observation that my client always seemed to be in a hurry.

He thought more about his reaction to his new boss. "How's that working for you?" I asked. I could not have asked for a better set up. This interaction was role play for real.

2. Leveraging Data and Facts to Create Logical Context

As I wrote in my previous article, for those of us trained in the scientific method, coaching often starts with data. This could be an internal or external 360 assessment, a self-generated instrument such as the VIA Survey of Character Strengths (free online assessment), Strengths Finder, Hogan or others. Personality inventories, strengths and weakness analyses, values and motivations all may reveal information useful to physicians in moving to leadership roles.

I prefer assessments that highlight strengths. The current literature on leadership development indicates developing one's strengths is a more effective path than spending time and energy in developing weaker areas. I encourage my clients to work with those professionals who complement their strengths, rather than working with those who are similar. It provides another route to reducing the possible impact of their weaknesses and it reduces the homogeneity of perspective that can lead to group think.

My preference is for interview 360 assessments rather than online assessments. I get richer, more nuanced information and interviewing others kickstarts the change process for my clients. Later, I can check back with the folks I've interviewed to see how my coaching client is doing. I write a straightforward, bulleted report that contains examples of behavior either supportive or critical (if unidentifiable as to source) with interviewees' comments from observing or experiencing the coaching client's actions.

In addition, I recommend my clients tell their colleagues they are being coached, and ask for feedback. There are at least two reasons for this. First, it engages others in the process. Second, coaching in medicine has often been for "problem children," or "disruptive physicians." We've moving to coaching as something for high potentials and for those at the top who would like a trusted advisor.

3. Let Science Do the Talking

Developmental delay and emotional intelligence level are reasons to consider a developmental approach when coaching physicians. A fellow coach suggested I not share adult developmental theory with physicians because “it will depress them.”

My experience is the opposite. When my clients learn about adult developmental theory they lean forward and ask for more details

“You mean I can improve?” they often ask, happy and astonished that science tells them there is hope for some of their secret fears. Adult development theory fits in with our medical training in infant and child development. They have changing over time in common.

After one of my clients learned about adult development theory, he said, “I think my 11 year old daughter is farther along than I am.” That was the beginning of another level in his leadership development, in his moving from either/or thinking to both/and.

As an executive coach for physicians in leadership roles my job is to offer clarity and hope – to be an Ambassador to (and from) the Republic of Medicine.

Issue Five: ROI and Beyond – The Promises, Pitfalls and Perspectives of Coaching Program Evaluation

[Guest Editor: John Lazar]

"What's the point of all this, anyway?"

If you've ever heard the question—and we're pretty sure that we have all heard that at least once—you already knew that you were in trouble. Your questioner couldn't see the brilliance of the project you'd produced; or he'd missed the exquisite reasoning in your eloquent remarks; or she'd not taken in the enormous impact of the outstanding coaching you'd provided her organization.

In the case of these examples and this question, ROI was, at least, temporarily AWOL--and when return on investment is absent without leave, you can be sure that others' investments in your ways will leave, too.

This issue of *The Future of Coaching* is dedicated to the proposition that we leave that pointed question behind instead. We will explore various perspectives on what people and organizations get out of coaching in comparison to what they put in—and we hope you gain much for your reading!

For important foundations and historical background on the ideas of ROI, we've included two articles from the *International Journal of Coaching in Organizations* (IJCO). First, we have the article on ROI written by Mary Beth O'Neill, one of the leading figures in professional coaching today. Her article was selected as one of the best in the first five years history of *IJCO* and was featured (with Mary Beth's updated 2007 commentary) in the journal's five-year anniversary issue.

An ROI Method for Executive Coaching

The second of the historic *IJCO* issues was written by two of the primary thought leaders and ROI practitioners in the field: Patricia Pulliam Phillips and Jack Phillips.

Measuring ROI in Executive Coaching

Both articles are republished here with the generous permission of their authors, for which we are very thankful.

In our third article, Noah Blumental, Elisa Malis, and Karlin Sloan deliver a brief overview of contemporary ROI and a short ROI analysis of a high-impact engagement at Accenture. They call for more use of measurement in support of our profession. Unsurprisingly, you'll find that they've noted the work of the Phillips and Mary Beth O'Neill.

Keeping Your Coach Accountable

Rey Carr details many of the best ROI resources available in "The State-of-the-Art in Return-on-Investment (ROI) in Coaching." This article, first posted in The Library of Professional Coaching in 2011, includes an excellent, curated selection on this critical topic in an annotated bibliography.

The State of the Art in ROI in Coaching

Our next set of articles broadens the horizon regarding the evaluation of coaching programs. Lory Lanese, an executive and coach at Intel, provides us with a prime example of measurement in action. She writes about coaching a team of engineers—and her focus on measurement provides the point of the exercise.

Leadership Change Ending Blindness and Igniting Intention

John Lazar, our guest co-editor for this issue, introduces us to the big picture inside which ROI sits: evaluation and its inherent judgments. His very experienced—and very ontological—take is well worth the read.

A Perspective on Evaluation

Finally, one of us [WB] offers a particularly broad view regarding the evaluation of coaching programs, pointing to the important distinction between formative and summative evaluation, and identifying the Four Ds of program evaluation: (1) description, (2) documentation, (3) diagnosis and (4) determination of outcomes.

The Essentials of Coaching Program Evaluation

We conclude this issue of *The Future of Coaching* with our coaching bookshelf and toolbox.

Our bookshelf reviews *Measuring the Success of Coaching: A Step-by-Step Guide for Measuring Impact and Calculating ROI* by Patricia Pulliam Phillips, Jack Phillips, and Lisa Ann Edwards. In this solidly useful book, the authors outline the ROI methodology and apply it directly to the profession of coaching.

Book Shelf: Measuring the Success of Coaching

Our coaching toolbox is a brief set of interview questions to be asking when a coaching engagement comes to an end. What type of information is of greatest value to both the coach and client?

Coaching Questions: The Exiting Process

Lastly, we'd like to recognize and give our thanks to our first-ever guest co-editor, John Lazar. John's expertise and experience in ROI made this issue richer and fuller—in fact, in the spirit of ROI, we can say that this issue has

37.5% more articles because of John. Moreover, when we consider an important intangible, his collaborative spirit made the process even more enjoyable for both of us.

May you find great value in what you read. (And when you do, please let us know your ROI!)

Leadership Change Ending Blindness and Igniting Intention Measuring and Graphing Change

Lory Lanese

After being a certified coach for 6 years while I performed a management role in a large corporation, I moved in a full-time leadership coaching and organizational effectiveness position within a large factory site that creates state of the art micro- processors. In this new position, I started forming coaching partnerships with various senior and mid-level managers. I asked one of the senior managers that I was coaching if I could observe him in action in a meeting. During the meeting, I was struck by the overwhelming mood of low energy and lack of smiles and laughter. There was no celebration of the small wins the team had achieved or appreciative statements during the meeting. (In my 25 years at the company I had not experienced this level of resignation) The team had been solving many difficult problems, and had much success but not enough recognition of the amazing things they accomplished. There were still many more problems to solve so the emotional state, the internal narrative. There is no light at the end of the tunnel. It's just our fate to work and work at never-ending problems. This was like watching the myth of Sisyphus in action.

The factory site had a culture that did not reflect its own desired state and the collective leadership behaviors did not reflect external research on best practices. A lack of trust and openness caused employees to be reluctant to ask their manager for help and to cling to behavior of self-preservation ("I'm going to watch out for myself and my own area"). In addition, a number of leaders radiated their own stress throughout the organization, generating a downward mood and state of feeling overwhelmed. My observation data revealed that often 70% of the leaders multitasked in critical forums, reducing engagement and positive leadership energy. Lead our People behaviors were insufficient with the dominant focus on task only and little focus on relationship. The common form of motivation was negative attention that research shows is three times the weight of positive, causing employees to use energy to avoid pain versus igniting possibilities. There was a general lack of encouragement, engaging the fire within that helps create a high performing team and individual productivity. The lack of desired behaviors was invisible to those immersed in the culture.

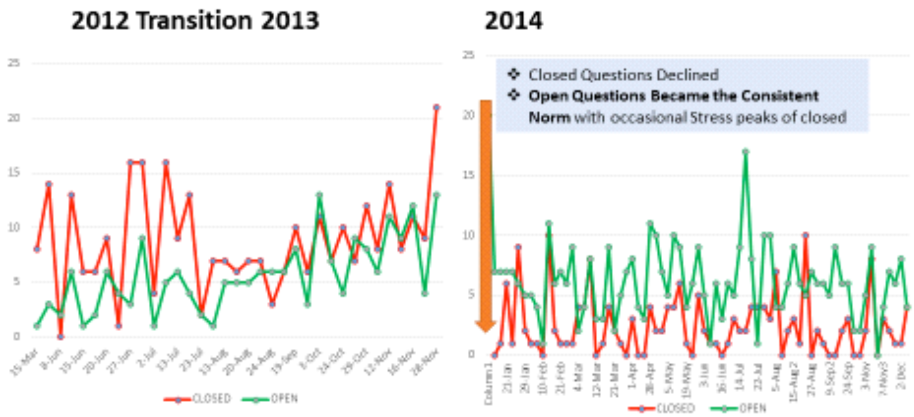
I started observing meetings to baseline what behaviors were occurring and what was missing. Since I had worked with engineers all of my career, I realized that they could connect to graphical representations of observations. This visible made what was perceived as soft and less tangible. At first I selected seven foundational behaviors, for four months, and then at a strategic meeting showed the staff graphs of their collective behavior. The behaviors I chose were based on research in neuroscience, studies of human behavior and consequences along best-known practices. I tracked laughter as a representation of light up energy and positive energy being brought into the meeting. I tracked Open questions (what and how) that invite exploration, learning, reflection and dialog. I also tracked closed questions that were predominately being used and in a meeting felt more like presenters were being interrogated so I could compare and contrast the change over time. I had encouraged the senior leader to begin meetings with recognition and to offer appreciative statements based on the research that at least a 5-to -1 Ratio of positive to negative statements will help to build relationships and high performing teams. I tracked asking for help and making offers, building mutual support and summarizing that demonstrated listening. When I showed the staff the graphs, one engineering manager said out loud, “She graphed our behaviors”. Along with showing the graphs I spoke about why these behaviors are important to high performing teams, organizations and their effects on human productivity and commitment.

The next step was to facilitate small group dialogs for the staff to determine what leadership behaviors they would commit to start doing or do more of. In addition, I asked each one of the leaders to make a personal commitment. Using research around forming habits I asked them to commit to one or two the behaviors to build into new leadership habits.

The approach taken integrated the research on positive-to-negative ratios, neuroscience, building new habits and high performing teams, power of feedback and removing blind spots, leader mood, motivating and demotivating factors, using the millions of moments every day to inform the change starting tops down. The methodology was: (1) Define the desired culture in terms of observable behaviors (2) Obtain leadership commitment (3) Baseline current state (4) Engage in observation (open up blind spots) (5) Provide feedback at individual and organizational level (6) Provide reporting showing graphical leadership behavioral change (visible barometer charting change).

Results: Over the next two-half years, leaders developed new behavioral habits and maintained and grew them during tough challenges, such as dealing with a 30% reduction in full time employees and a 50% reduction in vendor experts supporting the highly specialized equipment while hitting all time highs for output and supporting new technology start-ups. This site provided over 40% of the company's revenue in 2014. One hundred percent of the committed leadership behaviors continued to improve and even *doubled* in some areas (e.g. challenging the status quo/candor) as measured by observations graphed. It took 18 months for the staff norm to change from closed to open questions. Open questions now dominate meetings with occasional reversal to closed questions under high stress, but then revert back to the new norm.

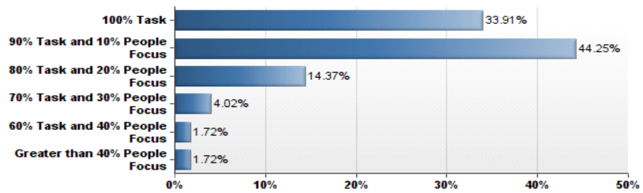
Open – Closed Questions

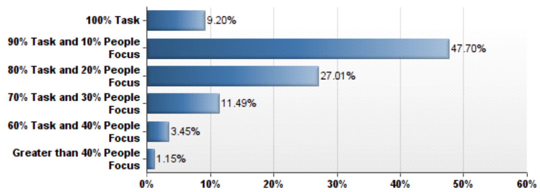


The mood of the leaders continued to become more positive and encouraging even during tough times. In 2012 positive energy went from zero to bouncing around an average of 5. In 2013 the energy results doubled and in 2014 doubled again.

Positive Leadership Energy

The staff had taken the Leadership Practices Inventory survey at the end of 2013 then at the end of 2014. Scores from direct reports improved (10+% increase) across the five leadership categories. As reported by one of the vice presidents: "*This methodology resulted in a significant increase in trust and mutual support at the staff level. This was particularly evident as the factory moved into high output, the team demonstrated an increased ability to accept challenging goals and found ways to deliver them in a timely manner. The product priorities changed with significant pull-in requests. Even in this very intense environment, the energy level stayed high, with each manager willing to support what was needed. This would not have been possible earlier.*" The culture now promotes asking for help, providing appreciation, candor and a learning environment. The bell-shaped curve for percent of task/relationship focus between employees and managers shifted from predominately 100% task to a 10 to 20% increase in attention to relationships.





The methodology can be used by any organization committed to changing leadership behaviors to create the desired culture. This approach can result in substantial change within a 12-18 month period. This approach combines different human behavior research to help shift a staff of leaders with key parts being observing, providing feedback and making the less tangible more visible through graphic behavior change over time.

I learned as I went along on this journey with the staff. Below are a few observations and moments that illustrate what I discovered.

Some unexpected results in the beginning when I observed if there was a good amount of recognition at the beginning of the meeting then there were more appreciative statements. If there was fewer recognition then there was less appreciative statements they tracked together. Last year the habits became strong so I noticed recognition and appreciation now track independently of one another.

In one meeting when I observed the mood dropped the lowest I had experienced in a long time, I mentioned it to the vice president. He then went into the next meeting being intentional about the positive leadership energy he brought into that meeting which totally shifted the entire mood.

I have been struck by comments leaders make now that tell me they are better observers of themselves and others in a meeting. They will talk about changing their approach when they notice the body language going negative or about being intentionally with a specific behavior to help encourage a team that is struggling, reminding them of the confidence they had in their ability to solve challenging technical problems.

An executive shared with me that he had observed a manager asking closed questions and saw the impact that had on the person the manager was talking with, the employee moving into a defensive mood and withdrawing. The executive provided a little coaching to that manager on open questions. Then manager he had coached later reported when he asked open questions he noticed the difference it made in the dialog and reaction of the other person.

What a difference it is now to observe meetings and experience the increased leadership behaviors. The leadership continues to take it to new levels. I am honored that I have been on this journey with them and proud that they have embraced and continue to expand their leadership habits and increase their intentionality.

There are now many meetings, I leave with a big smile on my face.

Issue Six: Supervision and the Future of Coaching

Welcome to this issue of *The Future of Coaching* magazine, whose purpose is to add more substance to the discourse of coaching—and to do so in a flexible and positive way. Our intent with this issue is to present a balanced perspective on coaching supervision, mentor coaching, and peer consultation within the coaching profession.

- The Problem of Competence in Coaching by Bob Garvey
- Supervision and Mentoring: A Distinction That is Arbitrary and Contrary? by Marcia Reynolds
- We've Lost Our Way and Our Soul in The Process by Michael Stratford
- Lost Souls? [Inspired by Stratford] by Bob Garvey
- What is the Soul of the ICF? by Jay Perry
- Supervision or Peer Consultation: An Op-Ed Blog by Patrick Williams
- What Is Coaching Supervision and Is It Important? by Paul Lawrence
- The Future of Coaching: Trends That Illustrate The End Is Near by Rey Carr
- Gold Rush Coaching Supervision by Vikki Brock
- Supervision of Coaches in Europe: Situation and Trends by Michal Moral
- ICF Approach to Mentor Coaching: A Competencies Applied Model by Damian Goldvarg and Laura Zuvanic
- Book Shelf: Supervision In Coaching by Vikki Brock

It wasn't all that long ago that when we wrote about coaching, our metaphor was of the Wild West. The ongoing joke was that, if you could hang a shingle with your name on it, you could be a sheriff or a coach. Sometimes, we now write about those days with a sense of loss (and sometimes with a sense of good riddance, too).

Our profession, it is clear, has evolved and is evolving. For one thing, when we say "profession" no one blinks or laughs because we are now a multi-billion dollar industry. More importantly, for most of us, our collective impact magnifies the output, the potential, and the joy of many other industries and many other leaders.

We will explore in this issue one of the ways coaching is changing: a current trend toward "supervision." We'll look at the term itself; we'll check out the larger trends in which it occurs and some of the ramifications of supervision's possible growth; we'll explore some alternatives and some accomplishments; we'll hear from the pros and the cons.

One of us, in particular, our Guest Editor, Vikki Brock, has invested a good amount of time in charting this trend. It's particularly appropriate, since one of her claims to fame in our profession is her extensive and impressive charting of the history of coaching.

We're now talking about the future of coaching itself—appropriate, don't you think, given our magazine's title—and some may say that future is a Bureaucratic Wasteland or an Island of Order, the Wild West Returned or Camelot by Coaching. Regardless, it will serve our clients, our profession, and ourselves to make sure we know where we want to go and where we are headed—and if they are the same thing or not.

Here's Vikki on the subject:

When I completed my PhD research in 2008 I identified several paths coaching might take in the future. On one end of the spectrum was the field becoming institutionalized and bureaucratic, and the other was becoming the new worldview. For the past year I have been closely following the movement toward establishing coaching supervision as a standard within the coaching industry. And what I see happening seems to me to be symptomatic of a change within the entire field.

The movement toward coaching supervision and how it is taking place demonstrates that a trend toward “legitimate professionalism” pursued by professional coach associations and others who benefit from more regulations is the path coaching is on right now. Legitimate professionalism means to be supported by recognized institutions of learning, an accepted body of research, and well-understood processes of certification. Gone are the days of open and transparent dialogue that value the input of elder coaches alongside newer coaches.

Rather than forging our own path, the coaching field at 20 years is continuing to borrow from other fields to define coaching. Read the perspectives shared by the authors who contributed to this issue. You make your own decision – do we forge our own path or run the risk of being overtaken by a new field with the agility to adapt to ever changing world requirements.

Summary of Contributions

Garvey – Garvey explores the problem of competence in coaching; he looks at the reductionist nature of competencies finding they are inadequate to deal with the complexities of coaching. He proposes revisions to assessment and accreditation that are rooted in person centered humanism philosophy; and are dynamic, situational and peer led.

Reynolds – The author’s perspective is that the arbitrary use of supervision and mentoring are contrary to the broader definitions of credentialed coaches. Asks the bigger question as to why elders in coaching are not consulted in proposed changes before the decisions are made.

Stratford – This author argues that the ICF has been violating their own competencies and the soul of coaching in how they deal with their members (clients). In their quest for legitimacy as a profession, associations like the ICF went hierarchical and bureaucratic, rather than innovative and distinctive. In coaching language, we focused on solidifying the "what" rather than the "who" – which is demonstrated in copying one more professions system … "supervision".

Garvey – EMCC has shifted focus over the years from eclectic mix to rational reductionism of managerialism and commodification. This form of managerialist professionalism rips the soul out of coaching and mentoring, and drives out inclusivity and eclectic mix in favor of exclusivity and commodification. We must return to core values and principles of what we do as coaches and mentors.

Perry – The soul of coaching is the foundation of our industry and this author explores what has happened to the soul of the ICF. While this talks about the ICF, it could just as easily be for the entire coaching industry. We co-editors choose to be those who are "willing to push back, to ask questions, to challenge the status quo". He also introduces the concept that coaching is a 'modeling' rather than 'service' field.

Williams – Supervision in psychology is extensive and required for postdoctoral students in the US. Supervision is the wrong term for coaches and fulfills one of the duties of a fully engaged mentor coach. Coaches are an unlicensed profession where peer consultation for professional development, self-reflection, challenges, etc. is a good ethical principle. Author suggests calling this process Coaching Consultation.

Lawrence – Australia guidelines for coaching in organizations requires all coaches to be engaged in professional supervision. Yet the industry does not agree what coaching supervision is nor who is qualified to act as a supervisor. Coaching borrows ideas from a range of disciplines. This author looks at research supporting supervision, identifies six approaches to coaching supervision, and shares results of it's own study with coaching clients.

Carr – Eleven coaching trends are identified that will have dramatic impact on future of coaching. These include (among others): glut of coaches; niche coaching; proliferation of credentialing schemes; and influx of parasites. While well-meaning, reasonable and making sense for individual practitioner survival, the big picture perspective appears to form an unintentional whole that results in a confused and at times baffled general public with regard to the coaching industry.

Brock – Published in the Spring 2015 *Journal of the Association for Management Education and Development* issue that focused on the future coaching and mentoring – evolution, revolution or extinction?, this article explores the potential for detrimental consequences and inappropriateness of imposing supervision on coaching practitioners, versus the established mentor coach approach. It also includes the chronology of coaching supervision within the coaching field.

Moral – The history, situation and trends of coaching supervision in Europe are factually presented, along with definitions and identification of the key coaching supervision associations in Europe. Accreditations for coaching supervision, the role of European Union, and scenarios for evolution of coaching supervision are included through a European perspective.

Goldvarg and Zuvanic – A key player in mentor coaching and more recently in coaching supervision is the ICF. This article describes the ICF approach to mentor coaching since 2010. Results of an interview survey administered to Latin American senior Mentor-Coaches for the purpose of building a model for mentor coaching competencies are shared.

Brock -- Finally, we have our usual book review (Bookshelf), which in this instance is quite timely, focusing as it does on books regarding coaching supervision.

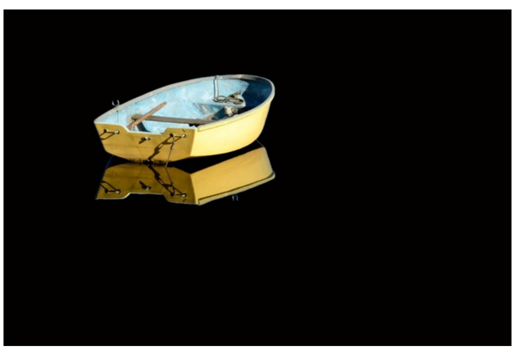
We’ve lost our Way AND our Soul in the Process.

Michael Stratford

Would anyone coaching, as a member in the ICF, tell a client that they had to imitate the existing success models in order to thrive? I would hope not. Would they seek to impose a structure for success they’d seen before, studied or been a part of? In fact, the ICF MCC minimum skill requirements would be expressly against that.

> A coach will not receive a passing score for establishing trust and intimacy with the client on the MCC exam if the **coach does not treat the client as a full partner choosing not only the agenda,** but also participating in the creation of the coaching process itself. Any indication that the coach is teaching rather than coaching will also create a score below the MCC level.

And yet, the ICF, as an organization, is violating not only our own competencies but the soul of coaching left and right and has been for years. Let me explain. The members are the clients and the organization / leadership is the coach. But a little context first.



Many years ago circa 1992 when I was introduced to coaching by Thomas Leonard, the process went something like this. I’d been told to go to this new workshop by my friend Jay Perry. Now I had been to lots of seminars, with success gurus and invariably, every time I tried something they had to offer and it didn’t work, inevitably it came back to the notion that somehow, if I couldn't make their system work, it was my fault and I was not somehow enough…committed, passionate, perseverant, something.

So, when he suggested I attend this course on 'coaching' I pushed back but eventually my trust of him said okay, one last time.

I went to the event in an apartment in Greenwich Village, and as part of it, Thomas said, "I want to give a coaching demo, who would like to be coached?" So I raised my hand and volunteered fully expecting to hear his success formula, one I'm sure would somehow fail if I tried it and I'd be once more thrust on the rocks of my own 'limitation'.

I gave him my scenario and he responded after listening attentively to it all…."When you've been successful in the past, what methodology did you use?" I sat there stunned. No one had ever asked me a question like that before. It was a question that contained at least three assumptions: Firstly, that I'd been successful before. Second that I had a methodology and third that I might know something about it.

Engaged I stumbled through a response and then the next question came. "And when you ran into obstacles what character traits did you draw on to keep going?" Again, there was silence on my part. And again, I fumbled the best answer I could in the moment. It went on for about 15 minutes and at the end, I felt alive, renewed, engaged and most of all…returned to myself. It was one of the more life affirming experiences I'd ever had and I thought…"I want to do this for people."

And that was the start of a 20+ years in coaching career. I joined the ICF which seemed to be an organization that was supporting these principles of honoring people's uniqueness, exploration (the word is all over the competencies) and discovery of something new that would fit uniquely to whom the client was and what they were seeking.

Sadly, we didn't do that same kind of exploration for ourselves. In our quest for legitimacy as a profession, we fell back on the 'tried and true' structures of other organizations, even adopting the Robert's Rules of Order way of meetings. We went all hierarchical with directors, a board, committees etc.

It was as if we had asked a coach how to put together an organization and the coach said …"Do what already exists." This is something that we wouldn't do for our clients and yet we abandoned the sense of adventure and discovery that is/was the hallmark of our profession. We stepped in a pile of incongruence and never looked back.

It seems we never dared to seek or invent a new form. We never took the moment to say…"if we are a unique organization, honoring a one of a kind membership and we were staying true to those values what would we create?"

We came up with 'competencies'…just like other organizations, to inspire and measure our profession's output. Sidebar here, who actually wants to be 'competent'? We didn't even take the time to seek out new language that would become part of the brand and therefore the distinction we presented to the world.

We were so busy trying to define ourselves as different from therapy or consulting or mentoring that we didn't notice that we were following what was taught about each of those things as to how to have an organization function.

We might have continued the sense of discovery and created something as yet unseen in terms of how an organization could function. And yet we didn't. We copied. And that is the singular most glaring indictment of how we operate that has created many more difficulties as that desire for legitimacy and 'professionalism' compelled us to simply adopt or attempt to adopt other practices for our organization.

In doing so, we gained acceptance in the world at the price of our soul. Our soul of 'not knowing but inquiring', our soul of 'daring to seek something new that fits the unique creature we were' our soul of 'honoring the individual' before simply driving to success. We forgot the 'who' of who we are and went pell-mell down the mountain to solidify the 'what'.

This shows itself in many ways not the least of which is the current thrust toward copying one more profession's system….'supervision'. I'm just curious, but haven't we spent decades trying almost desperately at times, to provide a distinction between coaching and therapy, only to adopt one of their ways of going about things and thereby blurring the lines even more?

And who is crying for this supervision? Certainly NOT the general membership. I've seen no hue and cry over the lack of this being present in the ICF. Yes, there have been some advocates - ironically though, from members who also seem to have a conflict of interest in that some from a company that would provide this service.

I get it. We need something that supports what new coaches go through. I agree, and yet looking for it outside ourselves in existing models denies the level of creativity that is within the membership of this organization. This is a service that used to be fulfilled by mentors before the ICF narrowed the definition of mentoring to something that even the general world doesn't subscribe to. My coach mentored me in a full range of topics regarding my success. Challenges I was facing with clients, growing my business, my mastery of skills. That's what I brought to him, after all, I'd hired him as my coach and I allegedly could bring anything I wanted to because I was paying.

We did this with the ISO initiative (the movement by ICF staff to one credential level in 2008) when we sought to measure ourselves more on a professional level as compared to other organizations. When did comparing ourselves to another become part of the ICF soul?

And the members are where stuff lives. If members are the 'clients' of the ICF then we are sorely being abused at present by the 'coach' having all this research, dialogue and meetings investigating 'Coaching Supervision' without first having consulted the client.

> "The coach, through a **partnering** discussion, ensures that **both** the coach and client are clear about the agenda, the measures of success, and the issues to be discussed. The coach attends to that agenda and those measures throughout the coaching, **unless redirected** by the client. **Any potential change in direction of the coaching session is thoroughly explored in partnership** with the client and **the client is the ultimate decision maker** as to whether a change in direction will occur. The coach regularly checks with the client throughout the session to make sure that the client's goals for the session are in fact being achieved and that the direction and process chosen are forwarding the client's thinking and/or action about their desired goals".

For anyone who might say…'but this is how leadership functions in an organization'. That's exactly the problem. Who says we have to be like every, or even ANY other organization? We're not operating as a coaching organization. We're operating as a copy of others. Something we wouldn't advocate for a minute that we do with clients, and something for which we'd get hammered in applying for a credential.

Either our competencies and the philosophy of coaching mean something across the board or it's as meaningless as all the 'these are our values' placards I've seen in companies that don't live by them.

> "Lack of full partnership will be demonstrated if the coach exhibits **an interest in the coach's view of the situation rather than the client's view of the situation**, **does not seek information from the client about the client's thinking around the situation, does not seek information about the client's goals regarding the situation,** or any attention seems to be on the coach's own performance or demonstration of knowledge about the topic. In addition, the evaluation will be

> negatively impacted *if the coa*ch does not invite the client **to share his/her thinking on an equal level with the coach and/or chooses the direction and tools in the session without significant input from the client."**

Bottom line…you can't have one code for the members of the organization and another for the leaders and how the organization functions and pretend any level of congruence. As for me…we've lost our way and a magnificent grand adventure is gone. We're now looking at the detritus of what we have wrought. Anyone anywhere can label themselves a coach, thereby either polluting the environment with untrained behavior ("I'm a tarot coach") or confusing the marketplace by diluting the brand.

Perhaps we brought this all on ourselves when we started by co-opting someone else's word for what we do…coach. It had different meanings before and still does, hence the question that is still out there "What sport?" The word comes with baggage because the association with existing definitions creates preconditioned expectations. We've spent a lot of time and effort by the membership trying to clear up muddy waters. Waters that were inadvertently muddied by us stepping into the stream with the dirt from other professions on our shoes.

Here's the reminder of what we're allegedly about:

> ICF defines coaching as partnering with clients in a thought-provoking and **creative process** that inspires them to maximize their personal and professional potential, which is particularly important in today's uncertain and complex environment. Coaches honor the client as the expert in his or her life and work and believe every client is creative, resourceful and whole. Standing on this foundation, the coach's responsibility is to:
>
> - **Discover, clarify, and align with what the client wants to achieve**
> - **Encourage client self-discovery**

- Elicit client-generated solutions and strategies
- Hold the client responsible and accountable

This process helps clients dramatically improve their outlook on work and life, while improving their leadership skills and unlocking their potential.

I haven't counted how many times the words discover, explore and create are in our literature but I'm betting the number of times the word 'imitate' is 0.

Issue Seven: Coaching and the Sociology of Knowledge

This issue of *The Future of Coaching* focuses on a somewhat elusive but critical theme operating in our world: the institutionalization of knowledge. Building on concepts coming from the sub-discipline called "the sociology of knowledge", our theme this quarter concerns ways in which knowledge is framed in the various societies in our contemporary coaching world and the even more specific ways in which knowledge is framed in subsets of each society.

We are considering several fundamental epistemological (knowledge-based) questions. First, is there an objective "reality" that we can all agree exists and that can be measured with increasing accuracy, given the proper tools and technologies? To a certain extent, the core of this question is whether there can even be objective knowledge. (It's a bad joke, true—and more importantly, a funny truism: We think there is an objective knowledge—it's just that we don't all share the same set of objectives.)

Second, are there important and influential ways in which we screen, interpret, and make use of knowledge we have acquired that tend to confirm and reinforce the world view we already hold? In other words, are we frequently participating in actions that produce "self-fulfilling prophecies" and consequently wind up creating silos of "true believers?"

We propose that these big questions are particularly for each of us to address not just with our clients, but also with ourselves and with our colleagues in the field and multi-discipline of professional coaching. In this issue of The Future of Coaching, we've got some really interesting people and perspectives to weigh in.

We find, in general, that the sociology of knowledge focuses on two topics that should be of particular interest to professional coaches. First, there are the **Ghosts** that linger in our field. These are the perspectives and biases embraced by the men and women who founded the field of professional coaching or, at the very least, set the stage for our field to emerge as a viable domain of human service. The past creates or at least influences or limits the future—unless we take it into account as we consider where we are going.

Second, there is **Money**. The field of professional coaching provides the opportunity for some talented people to make a very good living providing valuable (and highly valued) services to C-Suite executives who are willing to pay quite a bit (or work in organizations that are willing to pay quite a bit) for these services. Does the opportunity for lucrative business bias the kind of work that coaches do? Are we willing, in any sense, to sell a small part of our soul in order to generate and retain high-paying contracts? Do we very often collude with our clients, reframe a question in order to please our client, and provide reassurances that their world-view is correct or at least aligned with the dominant perspectives and values of their organization (or society in which they live)? Does money in the system create the opportunity for coaching to exist, incentivizing more and better approaches to helping humans in their work and lives? We're asking about what money (and other incentives, of course) does to the ideas and ideals of coaching.

In applying the sociology of knowledge to our field, we are confronted with these provocative questions, among many others -- and the answers to these questions can help us to be even better stewards of professional coaching--a human service endeavor that should be based on a solid foundation of ethics and critical reflection. As we've mentioned before, there's more of this world of coaching that bears exploring…

We begin this issue of *The Future of Coaching* with a rich and provocative account of professional coaching, prepared by Vikki Brock, a noted and widely-respected coach historian. Dr. Brock offers us an important perspective regarding the origins of the coaching profession and the forces that helped to mold this field:

[Professional Challenges Facing the Coaching Field from an Historical Perspective]

We turn next to two interviews that provides first-hand accounts of two different sources of contemporary coaching. The first account is offered by John Lazar, who describes the events, institutions and individual thought leaders that have helped shape his own perspective on coaching. He focuses, in part, on the early work and ideas offered by Werner Erhard, Fernando Flores and Julio Olalla. As an influential member of the coaching community, John not only exemplifies a particular point of view, he has been one of the leaders who helped to forge and reinforce this first point of view regarding professional coaching thoughts and practices:

[An Interview with John Lazar: Institutions and Influences]

The second account is offered by Edie Seashore, a legendary organization development (OD) practitioner. Seashore reflects on the way she frames her own work as a coach from the perspective of OD- a second point of view regarding professional coaching thoughts and practices:

[Edie Seashore: On Coaching]

A valuable contrast is provided by Lazar and Seashore, though they also share many values and strategies. The sociology of knowledge comes alive as we listen to the narratives offered by these two leaders.

Our third article is written by one of us [WB] in collaboration with two colleagues -- one from Singapore (Simon) and one from Norway (Eggen). They make use of ideas offered by Julio Olalla (one of the major influences on Lazar's work), as well as ideas derived from the contemporary sociology of knowledge and the much older allegory of the cave first offered by Plato:

Professional Coaching, Plato's Cave and the Sociology of Knowledge

We conclude this issue of *The Future of Coaching* with one of our regular features, the Book Shelf. In keeping with the theme of this issue, the book review centers on the work of Karl Mannheim (a founder of the sociology of knowledge sub-discipline):

The Book Shelf: Karl Mannheim and the Sociology of Knowledge

An Interview with John Lazar: Institutions and Influences

Interview Conducted by Bill Carrier

Learning in Institutions: Professional Beginnings

Bill: Thank you for joining us to talk with The Future of Coaching about the institutions of coaching from your own extensive experience! To get started, would you share a little bit about your background in terms of coaching and institutions that you've been involved in as you got started as a coach?

John: Sure. I think part of the background, Bill, that's relevant is that my initial training was in psychology, including a Masters degree in clinical psych. My orientation even before I was doing what was called 'coaching' was in the helping professions and enabling people to be better. I changed careers in '83 from psychology—where I had been working with the severely and profoundly handicapped, as well as having a private psychotherapy practice—to solving human performance problems in organizations.

I found very quickly as I went out into work situations that what I was doing—augmenting process redesign, or training, or work re-engineering, any of that kind of stuff—was meant to enable and accelerate people's learning and performance improvement and was, in fact, coaching. In the late '70s, I studied with the founders of neuro-linguistic programming, Richard Bandler and John Grinder and their colleagues, as well as Virginia Satir for family therapy. They were providing some models for how to engage people that had a coaching component though they didn't necessarily talk about it that way.

In the early '80s to the early '90s, I was working with three gentlemen from Chile: Fernando Flores, Rafael Echeverria, and Julio Olalla. At various times, they had two different companies, Hermenet and Logonet, which were doing training and development with folks about communications, sales, and things like that. There was a coaching component there.

Then in the early '90s, after those three gentlemen had gone their own way with respect to their businesses, Julio started his own company called Newfield Network. I took my initial coach training with him, I think in '92. It was in the '80s, while I was doing work in organizational settings that I actually got the label from someone that what I was doing was coaching. Before that, I was doing what I was doing but didn't really have a name to hang it on. That became more important to me because I was good at it and because I had already been listening deeply, had already been able to do at least some of the things that a coach does. It made a lot of sense for me to get trained formally, which I did.

Actually, I was at AT&T for some years, and they paid for my training in the Ontological Design Course (ODC) that I had with Julio, Fernando, and Rafael. They also paid for my training with Julio in Newfield.

The other pieces that I would mention, Bill, are that from 1993 to 2004, I was involved at Landmark Education Corporation. That was building on the work of Werner Erhard and, certainly, Fernando Flores, as well as the theorists on Speech-Act Theory, philosophy and other things about communication. That was a fertile ground for my own learning and development. The last seven years I was a master coach or a coach of coaches in the Team Management Leadership Program (TMLP).

It gave me an opportunity to stay actively engaged in some very rich conversations about what it means to be a team and what it means to make things happen together as a team. I got to coach the people who were coaching the teams and support their development because these are multi-year programs.

Contributing to Institutions: Professional Growth

Bill: You've done a really good job given a picture of how you got started and the middle portion of your coaching profession. You've been doing this for about as long as coaching has been around. How about a little bit of context to and what's been happening since 2004? We'll get into the details later but what other organizations have you been involved in?

John: In 2004, I completed my involvement with Landmark. I engaged in a conversation with the folks in Newfield about being a mentor coach in their coaching program. At Newfield, I found a spiritual as well as practical home, a community. It was an opportunity to be engaged in a conversation with like-minded and like-valued people. For three or four years, I worked as a mentor coach for Newfield. I then did the same kind of program coaching, I think in 2008, for Bob Dunham and his Institute for Generative Leadership. I knew Bob when he and I were both studying with Julio and Fernando and Rafael in Logonet and Hermenet and their Ontological Design Course.

Bob had started something, a 2-year program, called Coaching Excellence in Organizations. I immediately saw that it spoke even more directly and powerfully to me in terms of the direction that I wanted my career to take, than the work that I had been doing with Julio. I enrolled in the CEO program and also became one of the program coaches in the program. Several of us were concurrently taking the program and coaching others in the group on how to move through the CEO program.

I've been a program coach for CEO ever since, going on eight years. I completed the two years of the program. In fact, as participants we successfully lobbied to add a third year of the program. Bob listened to our arguments and did develop a third year for us all to take. You can consider the program as it currently stands to be a premier, graduate-level program for experienced coaches on how to coach even more effectively in organizational settings.

In CEO, I've got a lovely group of fellow program coaches. Bill, you were a program coach at CEO, too, as I recall and that was wonderful! I get to be actively engaged in these leading-edge conversations and challenge myself as an observer and reflective practitioner in order to continue to raise the bar on whom I can be and what I can provide.

Leading in Institutions: Professional Stewardship

Bill: We've talked a lot about the way you grew up and actually worked in the profession. I know that you've also been involved in a couple of organizations pretty fundamentally supporting the work of the profession of coaching itself.

John: That's true.

Bill: Please talk a little bit about what those are and tell us some more about them.

John: Sure. So, a little bit of history first. At one point in time and for a number of years, there was an event that took place every year, typically in advance of the annual conference at the International Coach Federation. That event was called the Executive Coaching Summit. It was a by-invitation-only, 2 or 3-day event for seasoned executive coaches, and it was an opportunity to have serious and deep conversations about topics of interest to executive coach practitioners.

I got invited to that and I think the very first year that I attended was 2001 or 2002. The event was held in Chicago. There may have been between 15 and 20 of us.

One of the people that I met was a guy by the name of Bill Bergquist. Bill was a very well-respected coach and entrepreneur. He had a coaching school that he owned out in Sacramento. He was extraordinarily well-read and well-written. He had written, I think at that time, over 30, 35 books. He was just a renaissance guy.

The reason that he caught my attention was because he had presented a proposal to fellow members of this Executive Coaching Summit to create a coaching journal. At the time, there was very little being published in any kind of formal way about coaching and what was published was not done with much rigor. Bill put his proposal together and presented it—and it was not extraordinarily well-received at the time. Lukewarm, I think, would perhaps be stretching it.

I was curious about this proposal for publishing a journal but I was even more curious as to whether Bill might not be a person to write something with, to co-author an article with. Now, for me, part of what was going on at the time was I had recognized the importance of writing as an important expression for myself professionally and I was also seeing it as a way of increasing my visibility. So, I invited Bill out to dinner and we had a very pleasant dinner and conversation. We decided to write an article together and took six to nine months to write that. Along the way, I came back to him and I said, "Do you still have any interest in proposing a coaching journal? Because if you do, I would be interested in exploring that with you."

Out of that initial expression of shared care and concern, we ended up revamping Bill's proposal and presented it at the Executive Coaching Summit the next year, where it was enthusiastically accepted. In fact, there were a number of people who were there at the summit who became members of the editorial board and stayed on for a number of years. In 2003, we publish our first issue of The International Journal of Coaching in Organizations, or IJCO. We published for nine years until I shut it down, I think, in December of 2011.

So, I think that's fair to say that IJCO was a direct offshoot of the conversations in the community of the Executive Coaching Summit. There was a second offshoot that also emerged a couple of years later, I think, out in San Francisco from another Executive Coaching Summit.

People observed that we were reinventing the wheel of the Summit each year because we were not an organization. We were simply a group of people that came together to make the event happen. There was a rather extensive discussion and declaration of exploring the possibility of creating an organization that could house these kinds of events so that practitioners could come together and create learning and development opportunities, to create something amazing.

Out of that set of discussions, the task force that was formed and the decisions and recommendations that were made emerged the International Consortium for Coaching in Organizations, or ICCO. For the first year or year and a half I was acting executive director and, subsequently, I was a board member. Ultimately, for a year and a half or so, I was president of the board of ICCO.

ICCO, though it wasn't around for all that long, did some truly amazing work, especially in the area of developing learning events that were very cutting edge, like our Symposia, the design of which I think is even still very cutting edge. The conversation at the Summit ended up creating a very excited but small group of followers and people who wanted to the play and wanted to have ICCO be successful.

I would say that one of the things that is similar between the journal and ICCO is that marketing and sales were never strong skills of many who played a role. Perhaps part of the reason that both of those institutions failed to be sustainable was that we didn't have sufficient expertise to effectively engage in those conversations and create the appetite for what they were providing. We did receive very high marks from journal subscribers and those participants at ICCO events.

I had several IJCO roles. I managed art design, production and distribution, as well as subscription sales. Bill and I were co-executive editors and identified the theme for each issue. I also did the final copy editing of articles. I had a tremendous opportunity for the quarterly issues to work with the article authors. In the process, we took their article idea and turned into a finished product that was, in my view, really stunning.

Observing Institutional Impact: Professional Legacies

Bill: Would you mind talking about the impact of the journal and maybe of ICCO? Could you talk a little bit more about how those affected individual practitioners or the profession itself?

John: I can offer a point of view but want to be careful not to overstate what I think the impact was. Okay?

Bill: Of course.

John: From my view, the impact that we had was a two-fold. The journal, as Bill and I conceptualized it, was meant to be a bridge between theory and research, on the one hand, and application on the other. It wasn't a fully evidence-based journal that had classic research design--you had a proposition and null hypothesis; you were trying to sort things out.

We required our authors to take a theory or to take a piece of research and then to build on it. What we intended to do and succeeded at, I think, was to encourage authors to expand on those models, theories and research in ways that would be relevant to practitioners as well as fellow researchers.
I think that has proven to be very effective. I think it was also effective in enabling people who chose to write articles for us. Bill and I were accountable for identifying the people who we would invite to write articles for us. We had the opportunity to work with them to help take their initial thoughts and form them into something really well-written, something that really had a story to tell, something that was, in fact, a contribution to our profession.

The reason I say that is because I received comments from a number of people with whom I worked. They expressed their gratitude, not only for the opportunity to write something for the journal, but also for the learning experience of working with me or Bill to get something into a final form. I think we helped crystallize ideas into things that were even more accessible and even more useful.

The journal never had a large readership. I don't think we ever had more than 500 or 1,000 subscribers. We had people who were purchasing articles off the website. I think perhaps a tribute to the impact of the journal is that more than three years after we stopped publishing—and while doing nothing to advertise about the journal—we still had people coming to the website buying articles, back issue, and things like that. They couldn't buy subscriptions anymore but they were making purchases of things that were relevant to them.

We also have, as I remember, at least one article that continues to be used by one of the business schools, I think Stanford, in one of their courses. That to me is, at least, a couple of data points around the impact of the journal.

I think one other thing is that over the years, Bill and I continued to improve the production values of the journal. In the last couple years, we really had a handsome publication. We were able to not only increase the quality of the articles but also to increase the size of each issue. I think we went from 40 or 50 pages initially to more than 160 pages.

Bill: Thank you. I think one of the things you are saying here is that the journal—even though you closed it down in 2011—is still affecting the ability of coaches to do their work, that the journal actually had an impact in developing the thinking of professionals who wrote the articles.

John: Yes. Our issues always had a theme, and so the authors that we would invite to work with us were authors that could contribute around that theme.

One of the issues that we had was on coaching and neuroscience and there was a David Rock and Jeffrey Schwartz article.

That particular article was the one picked up by Stanford Business School for one of their professors for one of the courses and it continues. I get something from the Copyright Clearing House every year with a request for so many copies of that particular article.

And that was only one of the five or six excellent neuroscience-related articles that appeared in that issue. As you know in recent years, the interest in neuroscience and how it connects to coaching, how it connects the leadership, has been an extraordinarily hot topic. We're finding and connecting dots and ways that are very interesting and very useful in my view.

Bill: So, here's a moment in which neuroscience, one of the subjects that we are really dealing with today in coaching, got more visibility across our coaching profession, particularly with a small group of people who were really interested in forwarding the profession

Bill: For readers who are interested in finding articles or previous issues of IJCO, where can they still find them? Do they still have the opportunity to read IJCO?

John: Absolutely. We published 32 issues and 175 articles over the nine years that we were publishing. If anybody is interested, they can go to www.pcpionline.com, where you can see the back issues and articles that can be purchased, typically in PDF form. Back issues of the journal are available in PDF or in print form if they're still in print. Those can be ordered online.

Bill: You had also talked about being involved in ICCO. Could you tell us a little bit more about what ICCO was, what it did?

John: ICCO was an organization that was meant to be a support organization for practitioners to explore and deepen their understanding of certain conversations or certain areas of professional endeavor and to do that in a group setting. I'm probably stating that badly but that's at least a short-hand on it.

The way ICCO did that was through its events. The group of coaches at the Executive Coaching Summit saw that if what we wanted to do was hold events, the Executive Coaching Summit was an annual event but without an organization as an appropriate legal structure. We were looking for an organization that could provide continuity, house a Summit or other kinds of events. ICCO was what emerged as the consensus amongst, I think, the 80 or 90 practitioners who were in California at the Summit event that year.

Once we formed ICCO, then it became a question of what were the critical issues? What did we want to do about them? And what was the offering that we wanted to make available to the larger community? Obviously, like with anything, there were cost issues and logistics issues, and so forth. We had other questions, such as whether we wanted to keep it connected with the ICF Conference or not? How long would our event be? What was an appropriate price point, given the people were already spending money to attend the conference?

Ultimately, what we decided came out of some wonderful discussions that were held up at Bill's school of psychology in Sacramento. It was a design for something that we call the symposium, which was a 2- or 3-day event that always had a theme, speakers and different ways of engaging with a topic area.

It was meant to be innovative, provocative, and to leave people-enlivened and expansive as a result of having attended. We ran those symposia for six or seven years, maybe longer, and invariably got rave reviews.

They were designed to be intimate events. It wasn't like thousands and thousands of attendants, not even hundreds. It was meant to be an event with 25, 30, 40 people.

What we what we lacked in size, we gained in intimacy, richness, depth, connection, and relatedness. In that regard, those events were—and perhaps to this day, continue to be—unique in what they provided at an intellectual and practical level on the one hand and in relational, spiritual, and heart space ways on the other.

Bill: You probably remember I even attended one of those events.

John: I do. If you don't mind my asking, so what was your experience of having attended that event? What seemed to work? What didn't? What do you remember? What stands out for you?

Bill: The community. It was a small event, probably 30 people in San Antonio. I was struck by being involved with a group of peers on the subject of our profession, peers who cared deeply about serving others and helping other coaches learn more about how to serve others effectively and more specifically within organizations.

John: Right. It was in the name: ICCO, The International Consortium for Coaching in Organizations. It was really about what happens in organizational settings and the kinds of issues that are relevant there.

Bill: I'll add here that being in a small group meant that I got to make some friendships and create relationships with people who do what I do, coaching in organizations, so we had this basis of understanding. I found it very intellectually stimulating. We were talking about things that mattered to our profession of executive coaching. I'd like to slip that question back to you and ask what you found to be the impact on individuals and the profession?

John: My sense is that there were a couple things: Because of the intimacy of the events we were facilitating; there was a building of relationships and bridges. I think you commented on that. You had relationships taken to a new level. Like what happens from the terms of new conversations, new possibilities opened.

I also think that by the explicit, provocative nature of these events and the kinds of conversations that we were having and facilitating, we pushed the envelope. We were pushing the envelope for people to stretch beyond their habitual ways of thinking about things, to think beyond their pat answers to a particular question or their pat responses to a particular way of framing and making sense of those questions.

There was something very Socratic in the ways that we were trying to engage people for the sake of their own learning and development and, therefore, what they would be able to bring back to their organizational settings. We got feedback periodically about how, out of the conversations that we had, a new perspective or a new distinction was gained. People did take that back and try something out that they wouldn't have otherwise. The bow of the ship moves a little bit in a desired direction. Does that answer your question, Bill?

Bill: Very much so.

Considering the Profession and the Future: Influencing Professional Beginnings

John: I think people always have the opportunity to take a look at how they want to develop themselves in their chosen profession, given what their cares are. Beyond that, there's this piece people ask themselves about "what else might I do? How can I can contribute?" There are obviously lots and lots of different ways that one can contribute. One of those is to stake out an area of interest, then see where you can add to the conversation, enrich the conversation, engage others in new and constructive ways around that area.

I feel extraordinarily privileged and grateful for the opportunity over the years go to work with the people that we worked with as authors and to support them, not only supporting us but supporting the field, raising important questions, and offering points of view that would be constructively provocative.

These were beginnings to me—meaningful steps moving things forward and explicitly looking to build, extend, and strengthen community.

Bill: You've talked about some of these small steps as someone who's been deeply involved in some of these organizations and institutions. Let's talk for just a few moments as we close up shop about what you see as next steps. What are the organizations that are taking these ideas to the next level? What's missing or what do we need an organization to do from your perspective?

John: It's a good question. Here are a couple of initial responses. Certainly, the International Coach Federation is a player as the largest global coaching institution. They've got a role to play and it remains to be seen to what extent they're going to step up to playing that role on behalf of not only their constituents, which are their coaches around the world, but also in terms of the larger profession as it emerges as a profession, and as well as those that coaching intends to serve.

I know that you and Bill Bergquist are involved in The Library of Professional Coaching and it seems to me from afar that the Library can be playing a role in terms of availability, access, and dissemination of information relevant to different kinds of coaching-related questions.

The NeuroLeadership Institute comes to mind as an organization that certainly does an extremely good job around its marketing and sales—and I think it's also growing in terms of how it's bringing together research and theory. It is providing some grounding for the kinds of understanding that can be developed about what we do behaviorally and how that translates into what's happening neurologically.

WBECS is an organization that in the past several years has played a role in expanding the coaching conversation and extending the availability of those kinds of conversations to people around the world at a reasonable price point.

Marshall Goldsmith, one of the leading executive coaches in the world, is doing what he's doing through his organization and taking all of his materials and making all available to the public at no charge. I think Bob Dunham and his Institute for Generative Leadership is doing some really leading-edge work around how we understand organizations, what's constitutive of them, and in what ways we can intervene elegantly, effectively and powerfully to make a difference.

The International Society for Performance Improvement or ISPI has been around for more than 50 years. They take a data-driven, evidence-based approach to solving human performance problems in organizations. In my experience, their Europe/Middle East/Africa (EMEA) Conference has been a lovely forum for bringing up coaching and coaching related topics to an international group of practitioners and decision makers. I find that my approach to doing coaching work has been heavily and positively influenced by their models. While I'm passionate about coaching, I consider myself a performance technologist who has coaching as an essential set of tools in my tool kit.

Two other institutions come to mind. One is the Institute of Coaching in Boston that you know about and their annual conference on leadership and health care, which I think is a really fantastic conference. Being a member of that organization has a lot of benefits associated with it. Then, finally, is the International Leadership Association (ILA), which is, I think, housed in Barcelona. They're an organization that brings together leaders and decision makers even more than practitioners to talk about leadership-related issues in organizations.

It was only last year that, for the first time, ILA collaborated with the Institute of Coaching to hold an event related to executive coaching that occurred in Barcelona. I'm anticipating in coming years that ILA is going to have some things to say and that coaching is going to have a broader presence and significance in those conversations and the kinds of work that they do.

Bill: What a neat way to wrap up our conversation and bring it full circle. You talked about how, early on, the institutions were helping shape what you were learning and doing in coaching. Then we talked about how you've helped found and lead organizations that were shaping coaching. Now, you've been talking a little bit about some of the organizations that are influencing what you as a leader are doing today and in the future.

John: And obviously that the list of things that I give you is based on the observer that I am and the things that are important to me. I'm sure if you were to talk to other folks you would get other answers in terms of what are the influencers as we look ahead. It's an okay starting point.

Bill: You've been exceptionally generous with your time. Is there anything else that you'd like to add?

John: Simply that I appreciate the work that you and Bill are doing with the library. I very much appreciate the occasional invitations that I get to participate and contribute. I continue to be a big fan of, as well as colleague and friend of, Bill's and of yours. I'm delighted to have this opportunity to engage with you about topics of mutual interest. Thank you.

Bill: Thank you, John. We are grateful for your support and collaboration.

Issue Eight: The Terrain of Personal and Life Coaching

This is the first of two connected issues on coaching. We have written about the "terrain" of coaching and the various charted and uncharted parts of our profession, encouraging continued exploration and explanation of the whole and the pieces (like effective contracting, establishing trust, methods and perspectives, how to measure outcomes or starting points).

There's another way we sometimes segment our work, this time into two vast and different lands: Life/Personal Coaching and Executive/Organizational Coaching. This, our first of two issues, will focus on Life/Personal Coaching; the second, on Executive/Organizational Coaching. Often it seems these domains lie distant and separate. In fact, we have professionals and schools, companies and nonprofits, which claim to be exclusively one or the other.

Certainly, there *are* differences. Coaches who work in organizations often have multiple stakeholders (client, boss, HR contact); Life/Personal coaches typically have a single person to whom they are responsible, the client. Coaches who work in organizations often have more complex interactions to acquire, contract, and assess their coaching work—there may even be multiple rounds of actual legal contracting. Executive coaching engagements can sometimes be inflexible or embedded in programs where they are secondary concerns. Life/Personal coaches may have more interactions to acquire clients and may need to think about scaling businesses in different ways. Their work may be more fluid and flexible since it generally occurs directly with the stakeholder who is also the client, contractor and evaluator.

But none of those important distinctions really address what we might argue is at the core of our work as coaches: the enhancement of individual lives. Whether that person works in an organization or is an organization unto themselves is not necessarily the defining factor of our work. We write "an organization unto themselves" deliberately to highlight the obvious observation of our profession: that people are quite complex in their history, experiences, actions and desires. But we also write the phrase to imply the connectedness of individuals and organizations--noting the fractal nature of our work as coaches.

A fractal, as we all may remember, is a pattern that repeats at progressively smaller scales, much like the molecular lattice-work in a crystal…or the behavior of a leader in a corporate division or a suburban family. Another example: You can see the way generosity appears as it cascades in patterns from people who lead to those who follow and, in turn, lead others who follow them, who again in turn, lead even more. You can also observe generosity in the way a leader lives with himself and the ways in which that influences his or her impact on others.

Sometimes we are helping leaders consider what vision is, or how to delegate, or what differentiates between the strategic and the merely good-to-do. Sometimes that vision is about how an organization could expand services throughout new continents; sometimes the vision is about how a leader sees his or her own impact expanding. Sometimes we ask questions about what could be essential to delegate in order to develop others and organizational reach; sometimes we ask questions about what people don't find joy in doing.

That's the thing about fractals: because they are patterns that repeat at different scales, you can follow them in and you can follow them out. Individuals and organizations are variations on a fractal theme. (Our work wouldn't be interesting enough if the patterns were always replicated perfectly…) Where we begin—focusing on the individual, or focusing on the organization, serving as Life/Personal Coaches or Executive/Organizational Coaches—may not be one of the more relevant distinctions of our work.

In this issue, we'll begin at the level of the individual, focusing on Life/Personal Coaching.

First, one of us joined with David Skibbins to write about the "Ten Trends in Life/Personal Coaching." (In our next issue, we'll have the article from Carol Goldsmith that inspired the thinking behind this issue, "Ten Trends in Organizational Coaching. ")

From our partner *choice* magazine, with the generous support of Garry Schleifer, we have reprinted two great articles. The first, by Ann Betz, concerns "How Coaching Changes the Coach." The second article, by Ronnie Brabon, is about "Wearing Two Hats: The Key to Whole Coach Mastery."

From the archives of the *International Journal of Coaching in Organizations* (special thanks to John Lazar, as usual), we have a great piece on adult development theory in coaching by Pam McLean, "A Developmental Perspective in Coaching".

We are glad to have a great addition to the Bookshelf, written by two of our colleagues (Edmundo Currie and Shinta Togatorop) from Indonesia. They are reviewing Matt Driver's Coaching Positively.

We hope you find these perspectives on the terrain of personal and life coaching to be of interest and informative. We will be offering various perspectives on the terrain of organizational and executive coaching in our next issue. Stay tuned . . .

Ten Trends in Personal/Life Coaching

David Skibbins and William Bergquist

Agendas in personal and life coaching focus on hope, meaning, aspirations and the future. This form of coaching concentrates on what could be, even more than what currently is. When we ask people to "follow their bliss" or to search for what in their soul or heart is most compelling, coaches are looking beyond their current-day assessments. Similarly, as we were preparing this article and considering the trends in personal and life coaching, we decided to anticipate rather than merely observe. The authors of this article decided to take a risk and suggest where we project these endeavors will be moving during the coming decade.

Rather than reflecting on where the state of personal and life coaching is right now, we are looking at trending that has been done over the past five years and projecting these trends forward. Through focusing on the future of coaching we are taking some leaps into new territory. Much as Taleb (2010) has noted with regard to other trends in our society that look like unpredictable "black swans," (unexpected events) we are inviting you to consider some new ideas that we base, at least in part, on our own accumulated experiences over the past thirty years as coaches, consultants, therapist and educators –experiences that are admitted biased, opinionated and hopefully provocative.

We have identified ten trends in personal and life coaching. We offer examples of how each of these trends has manifest itself in recent years, and we take a glimpse into what each of these trends might look like if it were to fully unfold.

Coaching and the Wiring and Firing of Our Brain

We are entering a new world of knowledge and understanding with regard to the complex processes ongoing in our brain and in the many other "thinking" parts of our body. The new findings in the field of neurobiology are likely to impact the way in which we do personal and life coaching in the near future—in large part because, in the coaching relationship, a client is often invited to discover the core values in their life, and then to begin altering their life to live in accordance with those values. This involved a lot of behavior change. The question of how the brain makes those behavioral changes is increasingly becoming an interest to coaches. The science of neurobiology is providing some answers.

The first insight recent findings in neurobiology provides us is in the area of memory. We now know that habitual behavior requires the shifting of knowledge and skill-sets from focused, intentional and explicit (conscious) memory systems to another memory system located in a different part of the brain (often called "procedural" memory). This second memory system is holistic, much less accessible to intention, and implicit (unconscious) in nature. When personal or life coaches try to "break up" the habitual behavior of their clients, they may be trying to move stored material between two different memory systems.

Resistance to the disruption of habitual behavior may be based not only on our fear of changing established behavior patterns, but also on the profoundly difficult task of recovering stored memories, and the early beliefs associated with those memories, up from the implicit, unconscious system. This resistance makes it difficult to examine those memories and to address primitive beliefs created by those memories, let alone to take on the task of reprogramming the explicit, procedural memory system.

Furthermore, recent neurobiological research (often called social neurobiology) (Rock and Page, 2009) indicates that the social/psychological constructs which guide our life and our relationships with other people are deeply embedded in and reinforced by and through complex, highly-redundant and multiple-level neural connections and networks. To examine (let alone attempt to "break up") these constructs may be quite difficult. The outcomes of such a disruption may be difficult to predict. This holds major implications for the personal or life coach who is encouraging her client to see things "in a different way?"

The second finding is that we react before we think. Specifically, it is now known that we immediately process most incoming stimuli through "templates" in our Amygdala (mid-brain) (LeDoux,1998). The Amygdala "templates" are applied to each incoming stimulus to determine whether or not this stimulus represents a threat to us (or perhaps the prospect of personal pleasure). Many of these Amygdala templates are probably established early in our life or may actually be "hard-wired" (could they relate to what Carl Jung identified many years ago as the "collective unconscious"?). We process these same stimuli through our cerebral cortex at a later point (1 or 2 seconds later) and process them more slowly. In most cases, we eventually temper the immediate reactions of our Amygdala by means of this more "rational" cortical analysis. When a personal or life coach is working with her client on difficult issues that may evoke fear-based templates, the coach is dealing with more than rational content. He or she must bypass or counter or at least address the emotional impact of these more primitive templates.

While there are many other neurobiological implications for the personal and life coach, we want to mention just one more. It involves the entire body. We establish "stress ruts" when exposed repeatedly to real or imagined threats. These ruts are grooved deeper with each stressful event and lead to permanent structural changes in our nervous/hormonal systems. We become increasingly vulnerable ("trigger happy") to stress (Sapolsky, 2004). A personal or life coach can play an important role in assisting her client in identifying and even seeking to avoid or reduce the impact of these stress ruts.

Our daily behavior is profoundly impacted by these stress ruts and by our patterns/decisions regarding sleep, exercise, exposure to light, and the consumption of alcohol, tobacco and other mind-altering drugs. Caffeine consumption might be a major culprit (Bergquist, 20110> When clients are trapped in such a rut they become less coachable. It may be hard to assist other people until they are "physiologically-primed/prepared" for this assistance. A personal or life coach might insist that her client be physiologically prepared for the challenges of coaching prior to beginning the coaching process.

Coaching and Health

Back in the early Seventies, when life coaches told people that they were a coach the usual response was, "What sport?" Coaches had to go on to describe what Life Coaching was. A decade ago that explanation rarely included concerns that athletic coaches had, such as diet, exercise, physical challenge, sleep patterns, physical health and fitness. This is changing. A foundational cornerstone of one major coaching school (CTI) is "Focus on the whole person." (Kimsey-House, et al 2011). Coaches are beginning to realize that their coaching also needs to include paying attention to the parts of the person located below the neck—as we noted above with regard to stress ruts. Specialties in personal and life coaching now include fitness coaching, nutritional coaching, coaching clients with chronic physical conditions, stress reduction and mindfulness coaching and finally health coaching as an adjunct to medical treatment. As Baby Boomers age and begin to redefine retirement, coaches working with this population are learning how to dovetail their coaching with medical breakthroughs to make life after sixty meaningful and rewarding.

One health-related coaching specialization appeared early in the history of coaching: coaching clients with addiction issues. (Skibbins, 2000). As the entire addiction field began to move from self-help perspectives, to approaches that included medication, family therapy, and group therapy, coaches have also created a niche in addiction treatment. Coaches were not successful as a resource in the early stages of recovery, but began to be utilized by individuals and recovery centers in later stages of treatment, to help the client make the transition from treatment into a sober or functional lifestyle.

Another area where coaching and psychotherapy has had a very successful marriage is in the area of Attention Deficit Disorder treatment. Prevatt and Levrini, (2015) points out how the practical coaching skills of accountability, brainstorming, and time management can aid any mental health professional working with these clients. Often teams of therapists and coaches can make a powerful difference through working together to provide a wider range of services to this population. In the future, coaching may be utilized in the treatment of a number of medical conditions in which a radical change of lifestyle is necessitated, such as stroke, Parkinson's, loss of limb, or diabetes.

In the future, insurance companies may see that health-related coaching, post-medical-treatment coaching, and medical compliance coaching are cost effective approaches. That will be a two-edged sword for the coaching industry. Coaching has been a relatively lawsuit-free enterprise because there have been no deep pockets in which to reach for high judgement rewards. If insurance begins to compensate coaches that may situation may change for the worse.

Coaching and Psychotherapy

From its inception coaching has been on the frontier of the human services territory. As with all frontier towns, all a Sherriff needed was a six gun and a badge. In the early days of coaching all a coach needed was a business card that said, “Coach.” In those early days the boundaries between coaching and therapy were more clear cut. Therapy focused on dysfunctional behavior. Psychodynamic approaches sought to uncover past patterns that led to that dysfunction. Cognitive approaches sought to modify behavior patterns to improve functionality. On the other hand, coaching focused on strengths, potential, values, goals, ideals, and attaining a long-term vision of the future you desired. It appeared that these were two distinct human services (Skibbins, 2007).

Even in recent years, a clear line has often been drawn between these two fields. One of the leaders in the field of personal coaching, Patrick Williams (who is also trained as a therapist) offers the following four distinctions regarding the relationship between the therapist and client as compared to the relationship between coach and client: (1) past (therapy) vs. future (coaching), (2) fix (therapy) vs. create (coaching), (3) professional (therapy) vs. collegial (coaching) and (4) limited (therapy) vs. open (coaching). (William,2015)

These days the boundaries may be blurring. Trends in modern psychotherapy include mindfulness training, narrative therapy, sports psychology, positive psychology, Neuro-linguistic Programming, Holistic Psychotherapy and the entire Human Potential Movement. Psychotherapy is beginning to focus on defining and meeting the client’s needs. Psychology is moving towards areas previously addressed by coaching. At the same time, coaching is incorporating neuroscientific innovations, couples coaching, Emotional Intelligence work, mindfulness training, and Insight oriented coaching. The coaching profession is moving into that boundary region between psychotherapy and coaching.

Coaching seeks to professionalize itself. Training programs that seek certified recognition from the International Coach Federation must meet standards that include supervision, class instruction, and many hours spent coaching. An individual wanting ICF certification must certify their education, be tested, and participate in Continuing Education. (https://www.coachfederation.org) However, none of this training can begin to compare with what is required to become a licensed professional psychotherapist. This leads to acrimony between the two professions, especially as each begins to encroach on the territory previously ceded to the other.

There is no easy reconciliation to this conflict. As psychotherapy evolves, exploring the future concerns, expectations and ideals of the client will become grist for the mill of the therapeutic relationship. As coaching evolves, exploration into the working of the brain, and a deeper understanding of the barriers to effective choice making will become grist for the mill of the coaching conversation. A head-on collision is inevitable, and may lead to a deepening of both professions, if member from each side can come to respect the contributions of the other.

Coaching the Couple and the Family

Just as the focus in corporate coaching is broadening beyond one-on-one interactions to include team and work group coaching, so too in the field of personal life coaching the scope is broadening. Coaching is no longer just a one-on-one interaction. Relationship coaching, married couples coaching, and family coaching are now a part of the mix (Ives and Cox 2014). And like all other aspects of personal coaching, one of the first tasks of a coach who is working with more than one person at a time is to clearly distinguish how this form of coaching differs from couples or family therapy.

In couples and family therapy, the first order of work is to identify dysfunctional behavior and communication patterns. The therapeutic intention of this psychologically-oriented work is to create more intimacy and authenticity in the couples or family system with the focus on making that unit more functional, connected, intimate, and aligned. In a sense the goal is: "How can we get past our previous problems and difficulties so that we can be happier today?"

Alignment is also a goal of relationship, couples and family coaching. But the premise a coach operates from is that the couple or family unit is already strong and functional. There are no major problems to be fixed. The goal of this work could be expressed as: "How can we align where we are, and where we are headed as a unit, so that we can be happy today, tomorrow and into the future?" In a sense couples and family coaching begins where couples and family therapy leaves off. The entire field of positive psychology is beginning to focus attention on the dynamics of successful couples, families, friendships and relationships. It is hoped in the future that the practice of life coaching and the research of positive psychology could be married together as a unified approach for supporting successful relationships, while couples counseling and family therapy could continue to focus on repairing dysfunctional communication patterns.

Coaching and Leadership

As Bob Dylan (1979) reminds us, "Well, it may be the devil or it may be the Lord/ But you're gonna have to serve somebody." But it is also true that, sooner or later, you're gonna have to lead somebody. We generally think of leadership within a work or corporate setting. We look at formal positions of authority within the work setting. But leadership extends far beyond those role-limited boundaries. You are called to lead throughout your life: in your intimate relationships, in your family, in your community, at your church, temple or mosque--or sometimes just walking down the street. Circumstances can come up at any time that can call you into leadership.

There are several styles that any leadership can take, and as many categorical systems to describe those styles as the mind can devise. (Blanchard and

Johnson, 2012). Let's keep it simple. You can lead from authority, in a top down fashion. You can lead by participation, working closely, or even side-by-side with those you lead. Or you can lead by giving the authority over to those you are in charge of, with minimum guidance. All these are effective, but in differing circumstances. In a fire everyone needs a leader with clear authority. In many working teams people want a leader who is there with them and who inspires them through the leader's actions and vision. With a highly functioning group sometimes all the leader has to do is point the group in a direction and they will do the rest.

Dwight Eisenhower (1954) said, "By leadership is the art of getting someone else to do something you want done because he wants to do it." Leaders inspire, whether through fear, through respect, through vision, or usually a combination of all three. To be able to lead in all aspects of your life you need a clear idea of who you are, what you believe, and what you want from others. Personal and life coaching provides a relationship in which all these areas of your life can be discovered and explored.

Personal life coaching gives clients a values-based foundation from which they can lead, both in work and in non-work related situations. This style of coaching focuses on discovering what each client's unique personal values are, and how they can be expressed throughout the client's life. Personal coaching seeks to establish an authentic, distinctive, values-oriented base of operations from which clients can make decisions, and from which the client can inspire others to join them in their projects. Leadership-oriented questions that personal coaches are increasingly asking are: "What is your job this lifetime?" "What difference are you going to make in the world, in your community, in your family, and in your relationships?" "Why were you placed on this Earth in this lifetime?" "Who are you meant to lead?" and "Who are you meant to serve?" In the future this focus on leadership which has been so exclusively oriented towards issues relating to leading at work needs to widen its focus. The question needs to become, “How can you lead in all aspects of your life?” (Kimsey-House and Skibbins, 2013).

Coaching and the Decisional Sciences

In recent years, a multi-disciplinary field called “behavioral economics” has captured the attention of many behavioral scientists. It has drawn attention to the complex and often challenging process of personal decision-making—whether this process involves the mundane choice between two dinner entrees at a restaurant or fundamental life decisions regarding where we live, who we choose to spend our life with, or what we will do about our rebellious adolescent child.

Why this sudden “invention” of a new multi-disciplinary field? As is often the case, the new field involves a “perfect storm” of aligned insights emerging from seemingly disparate disciplines. In this case, the fields are psychology, economics, marketing, sociology and philosophy (with a few other disciplines thrown in for spice). Perfect storms also often involve a series of crises (political, economic, epistemological, etc). In the case of behavioral economics, the crises have to do with the rapidly increasing complexity and unpredictability of the world in which we operate – a world filled with many unexpected “black swans” and tipping points of chaos.

The unpredictability and complexity of life have led to the creation of great turbulence, with swiftly flowing streams (rapid change) intermixing with swirling pools (patterned change) and stagnant side waters (resistance to change). Connecting the rapid, patterned and resisted change are the areas of complete unpredictability and great complexity. One of the major geographers of this turbulent world, Scott Page (2011), differentiates between systems that are complicated (many working parts) and systems that are complex (many working parts with each part connected to every other part). It is in the world of complexity that we find the tippiness of life and the unpredictability to be faced as decision makers.

This is where behavior economics comes to the rescue (or at least brings to the world some clarification). When faced with complexity, unpredictability and turbulence, we grasp on to "heuristics" – decision-making rules that enable us to focus, take action and judge the validity and effectiveness of the decisions we do make. These heuristics can sometimes be quite helpful (building on our extraordinary ability to be intuitive), but at other times they can get us in trouble. The behavioral economist and Nobel prize-winner, Daniel Kahneman (2011) aligns these heuristics with a process he calls "fast thinking" and describes a second kind of decision-making process that he calls "slow thinking."

It is this latter type of work that Kahneman believes should be engaged at critical times in our lives. As Personal and Life Coaches we can help provide our clients with some "slow thinking" – help them "put on the breaks" for a few minutes to reflect on their own "fast thinking" assumptions and decision-making process. Ironically, in a recent set of studies, one of us (Bergquist, 2015) is conducting with more than 200 coaches from around the world, it appears that "slow thinking" is also often absent among professional coaches themselves. Thus, the trend might be toward slow thinking not just for our clients, but also for ourselves.

We believe the future of professional coaching at the personal level at least partially resides in this activity of "slow thinking." This decision-making approach which emerged from a focus on work-related situations can be applied throughout the life of the client. A coach can help her client sort out the options, discern that which is real and helpful in the world and that which is misleading and counter-productive. The personal and life coach who promotes and helps her client engage in slow-thinking provides guidance by offering provocative questions, by helping her client to become aware of a set of assumptions and trace out the implications of a particular course of action.

Coaching the Transitions

Frederick Hudson (1999), who was one of the pioneers in the field of personal and life coaching was also a major contributor to the field of adult development. He was founding president of the Fielding Graduate School and founder of the Hudson Institute. For Hudson, the history of a life occurs not in stages as Erik Erikson (Erikson, Erikson and Kivnick, 1986) proposed, but in cycles. We return (with new insights and strategies) to the same fundamental issues at multiple points in our life. This being the case, then it seems appropriate that personal and life coaching be made available to people of all ages (a trend we note later), as they encounter challenges associated with the beginning of a new cycle--dealing with what Bill Bridges (2004) calls “life transitions”. They also encounter challenges associated with the end of an existing cycle. These beginnings and ends – these moments of preparation and reflection—are highly “coachable” moments. They enable each of us to benefit from the thoughtful companionship of a personal or life coach.

When might these “coachable” moments occur and when might personal and life coaching become of particular value. The obvious times are when there is birth (a new child), death (of a significant other), marriage, major illness and divorce. These are usually the defining moments in each of our lives. We find similar moments of major personal transition in our work life: a new job, a promotion, a firing or lay-off, retirement. The critical point to be made is that these major transitions (and many others in our lives) are inherently stressful – whether these are “positive” transitions or “negative” transitions. The life change scale -- developed many years ago and refined by one of us (Bergquist, 2011) -- points to the impact of transitions on our physical and mental health. The key point is that the impact of a major transition typically does not show up immediately, but rather is a ticking bomb—often manifest only six to eight months after the transition occurred.

There is one other important point to make when anticipating the future trends in personal and life coaching. This point concerns something called "locus of control" (Skibbins, 2007). We know that transitions look and feel quite different if they were initiated by our client then if they were imposed by some external person, event or circumstance. Typically, when we have some control ("internal locus of control") the transition is accompanied by a sense of hopefulness and personal empowerment, whereas the externally-imposed transitions ("external locus of control") is often accompanied by a sense of hopelessness and helplessness. Even when the external imposed transition leads to positive outcomes, we are inclined to interpret these transition as a matter of luck, good fortune or gift from some divine entity. We typically don't learn much from this external imposition, whereas a transition that we have initiated can be a rich learning-ful event, especially if we are accompanied by a skillful personal or life coach.

Coaching on Behalf of Fulfillment, Meaning, Generativity in Life

Several decades ago, Robert Bellah and his colleagues (Bellah et al, 1985), wrote about American society in their insight-filled book, *Habits of the Heart*. One of their many poignant observations concerned the substitution of psychotherapy for the religious confessional. We unburden our souls by seeking out a shrink rather than a priest. But this might be changing. Today, Americans (and those from other of the more prosperous and less traditional societies) might be turning to personal coaches for their own existential soul-searching. As we will note later, this type of coaching might often be linked directly to issues regarding spirituality and one's search for faith in a highly secular society.

We find that there is another way in which personal coaching has become something of a confessional. That occurs when fundamental issues regarding life fulfillment and the search for meaning takes center stage in the coaching engagement. This coaching approach is often associated with those coaches who have an ontological or existential orientation. The work of Julio Olallo (Olalla and Bergquist,2008) comes to the fore, as does the narrative coaching offered and described by David Drake (Drake, Brennan and Gortz, 2008).

One of us has recently engaged in work focusing on the process of deep caring in the lives of our clients and leaders we have interviewed (Bergquist and Quehl, 2016). Erik Erikson (1986) associates this yearning for deep and abiding care as the foundation of generativity—the seventh stage in his model of life development. We have expanded Erikson's analysis to suggest that deep caring and generative acts occur at all points in our life. The first act of generativity occurs as we give birth to and provide care to one or more children, or as we give "birth" to a new project which we nurture and care for deeply (often for many years). The second act of generativity typically occurs when we expand our zone of caring to an organization of which we are a member (and often a leader). We provide mentoring and other modes of support for the next generation in the organization.

The third role of generativity occurs when we expand out not just in terms of space (from family to organization) but also in terms of time. We become the guardians of traditions and caretakers of the natural environment or of historical sites. We bring the values and accomplishments of the past into the present and extend them into the future. Finally, there is a fourth role of generativity which extends both space and time. It concerns civic engagement. We care deeply about our community, our society – even our world. We become stewards, advocates, activists, change-agents on a very broad stage.

We anticipate that each of these acts of generativity will be even more effective and of even greater importance to the deep-care giver, when associated with personal and life coaching. We are suggesting an interweaving of essentially "existential" reflection with the practical, action-oriented strategies of deep care-giving. This will probably mean that personal and life coaching becomes even more intricate and valued in the world of professional coaching. Narratives of generativity will be carefully recorded and studied by client and coach, with a sustained focus being placed on finding the patterns of meaning, aspiration and value that reside in these narratives and in the acts of deep-caring.

Coaching Throughout the Lifespan

Personal and life coaching have often been confined to mid-life issues – helping our clients address the now-famous "mid-life crisis" or the 40s and 50s in our life. We would suggest (to reverse an old adage) that "coaching is wasted on the middle-aged client." Great coaching opportunities are to found in working with clients who are much younger (especially those in their adolescent years) and much older.

The coaching of young people has begun—often with regard to assisting students with their education and learning. We are likely to find this approach of increasing value in this time when parents push even harder for their children to be successful and (sadly) as many school systems face a diminishing source of funds to support "extra-curricular" activities (including tutoring). For adolescences the challenge might be even greater, given that they not only lack the life experiences of their parents, but are also saturated with the hormones and other neuro-chemicals that make thoughtful and careful reasoning that much more difficult. This age group needs more than just assistance with education. The young men and women of our postmodern world are faced with those same challenges of complexity, unpredictability and turbulence that we described above. They have to make difficult decisions, just as their parents do.

We can move to an even older age: early adulthood. Faced with the same daunting challenges as other adults in our society, and the added challenge of making a living wage in an adverse job market, it is understandable why young adults would want to cocoon, living at home well into their 20s— and regularly escaping into a substance misuse and a world of faux computer-generated graphics and narratives. They could use a coach! We might find that this request for a coach will be made not to mature adult-coaches (who they might consider to be no better than surrogate parents) but instead to peers who have been trained as personal and life coaches. Their peers are more likely to have some credibility when it comes to empathy (and also provide a bit of role modeling).

At the other end of the life spectrum, we find men and women in their 60s, 70s and beyond. As George Vaillant (2012) has noted in his extraordinary study of Harvard men at each stage in their adult lives (the study beginning in the late 1930s), there are many new challenges and changes facing mature adults during the final decades of life (if they are fortunate enough to be still healthy after their 50s). We now not only live longer (in Western Societies) but also have many decisions to make about how we wish to live the last third (or even half) of our life.

Most mature adults find themselves at mid-life standing between two worlds: the world of active, income-earning work and the world of retirement and avocations. As mid-centurions living in the United States or most other prosperous Western countries, we are allowed to explore alternative identities at the point we retire, provided we are not living in poverty or are not in ill health. During the 20th Century, retired husbands were often quite fortunate if they came from the middle or upper-middle class. The man could move in many new directions: take up hobbies, spend time at home reading or playing games, or engaging in recreational activities such as golf, tennis or bowling. Traditionally, women living in Western civilizations did not have it so good. They were expected to remain occupied as homemakers even after their husbands retire. Their work might even increase, given that they must now "look after" their husband who is suddenly "underfoot."

The world of retirement has grown a bit more complicated in recent years, and the transition between work and retirement has become more confusing for many men and women. First, mid-centurions do not necessarily retire at 65. Some work by choice, many work by necessity. Second, some mid-centurions want to make the transition in life and career earlier than at age 65. In either case, the question is: how do we handle this transition—which brings us back to that trend of transitions that we identified earlier in this essay. A personal and life coach can be of great value at this point in a client's life.

If we are in our late sixties or early seventies, we often don't have enough money saved for retirement. Do we have time for activities that lead to fulfillment and generativity during our sixties or seventies? Or do we still have to be "working stiffs" who have no time for gratifying work outside our immediate family? A generative option is available to those who have been financially successful in life or are particularly courageous. These fortunate or brave men and women alter their life style so that they are doing what they really want to do. The traditional distinction drawn between work and retirement begins to break down for the men and women who choose this option. Their work often becomes their avocation and their hobby becomes that for which they are paid. A personal and life coach can be of great assistance in finding their older clients the path to this often gratifying late-life path.

Coaching to the Spirit and Soul

Alan Sieler (2005) uses the term Ontological Coaching to describe a way of work that encompasses the entire being of the client. Counseling and coaching the client's sprit and soul involves looking at the deepest level of one's identity, one's discovery of meaning in one's actions, and one's belief in and alignment with something greater than one's own ego or personality. It can involve seeking redemption for one's past unskillful actions, committing to act skillfully in the present moment, and making intentions for one's future actions. Earlier in this article we discussed how, in this secular age, psychotherapy had become a modern ritual with deep links to confession. Coaching, psychotherapy and religious counseling may address transgresses in past behavior and can point to a form of atonement, be it through adopting skillful changes in your behavior or through reciting ten Hail Mary's. However, those past transgresses are not so interesting for a coach. Coaching orients itself to the future, and is not very concerned with past sins. It focuses on what is most meaningful right now in the client's life. It seeks to focus on an individual's unique values: but the boundaries between values and morals can become quite clouded at times. Often it is hard to distinguish between doing what you should do, because it is the right thing to do, and doing what you want to do because it is a manifestation of your deepest truth.

A minister, rabbi, cleric, priest or spiritual guide usually has an established set of beliefs and codes of behavior to operate from when doing such an exploration with a member of his or her flock. Psychotherapists have a unified body of psychological work from which they can draw their insights and strategies when digging into the more spiritual and epistemological regions of the client's experience.

Coaches are on their own. The only guidebook the coach has is the client's own experience, values, beliefs, and the vision and goals that clients set for themselves. If the client's concerns are entirely secular, and if the client only wishes to focus on practical issues and material goals, then that will be the level where the coaching remains. If, however (perhaps after a gentle nudge from the coach) the client does want to explore more transpersonal issues about the meaning of their life and the nature of their soul and the universe, then the coach does not become a spiritual leader, pointing the way. Rather he or she follows the lead of the client, as they wander into this new territory of inquiry and self-discovery.

In the future, the coaching profession has a lot to contribute to pastors, rabbis, priests, clerics and other religious and spiritual counselors and teachers on how to incorporate inquiry into their spiritual counseling. This guidance-from-within approach could potentially meld with the more traditional guidance-from-above.

Conclusions

We wish to conclude by coming full circle and turning one more time to social neurobiology – for this field yields one additional challenge that should be addressed by all practitioners and teachers of personal and life coaching. Apparently, the neurochemistry associated with formation of intimate relationships is quite different from the neurochemistry associated with formation of friendships. In both cases, powerful, chemically-based bonds are formed and these bonds are reinforced whenever our intimate or our friend appears before us. But those bonds differ in nature. Our body literally "lights up" with one set of neuro-chemical responses when the other person is considered a friend, and a completely different set of neuro-chemical responses when the other person is an intimate.

It seems that the neuro-chemical reactions of a patient in psychotherapy (especially when it is long-term and depth oriented) more closely resemble the neuro-chemical responses of an intimate relationship rather than that of a friendship—and these neuro-chemicals are released in both the patient and therapist. The processes called "transference" and "counter-transference" may be something more than the replication of patterns and images from previous intimate relationships (including parents). These processes may involve the release of neuro-chemicals that are the same as those released in our intimate relationships.

What about the personal and life coaching relationship—is that more like a friendship than an intimate relationship? What if this form of coaching, like therapy, releases neuro-chemicals that replicate intimate relationships? What if coaching differs from psychotherapy by lighting up the friendship set of responses? Does coaching in an organizational setting light up the brains of coach and client in the same way as personal and life coaching (which can involve more intimate issues)? What about coaching that touches upon the spiritual dimensions of life—how does the brain light up when these issues are addressed? Stay tuned. We suspect that there is much to be learned over the coming decade about these matters – and predict that personal and life coaching will never quite be the same once we gain a clearer sense of how our clients (and we as coaches) operate and construct life over many years and in very complex, unpredictable and turbulent time.

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Issue Nine: The Terrain of Organizational and Executive Coaching

In the eighth issue of this digital magazine we focused on Personal and Life Coaching – the one-on-one coaching that so clearly defined the field during its earliest years (in the 1970s and 1980s) and that still is the major player in the arena of professional coaching. In this issue, we turn to a parallel initiative: the provision of professional coaching in organizational settings.

Despite the many attempts to differentiate between their two areas of professional coaching (and often an attempt to define one as somehow superior to the other), there are clearly many overlaps between personal and organizational coaching and many successful practitioners work in both areas. We have chosen to devote two separate issues to these two areas in large part because there is too much to say about both personal and organizational coaching to place in one issue. If you have not already done so, we invite you to review or download issue eight and certainly encourage you to review and download the insightful and provocative essays contained in this issue.

We begin with a retrospective piece: the panel presentation on coaching in organizations that was convened at the 2003 ICF annual conference in Denver, Colorado. We have not only provided you with an edited version of this panel presentation (featuring some of the major players in the field), but also invited the panelists to offer their own insights in 2016 (13 years after their initial presentation). You will see that some things have changed and others remain the same.

[Executive Coaches Share Openly and Unselfishly]

Our second essay parallels (and helped to inspire) an essay contained in Issue 8 (Ten Trends in Personal and Life Coaching). Written by Carl Goldsmith, this essay is entitled “Ten Trends Driving Organizational Coaching.” As suggested in the title, Goldsmith provides a summary of surveys conducted by several international organizations and a panel presentation made at the 2015 Capital Coaches Conference in Washington D.C. We invite you to compare the presentations made by the 2003 panelists with those offered in 2015. Goldsmith’s report is also based on confidential interviews with dozens of North American leaders.

[Ten Trends Driving Organizational Coaching]

Our third essay is a case study provided by one of our esteemed colleagues, Suzi Pomerantz – with brief comments on this case offered by one of us [WC] who participated in this multi-coach project. Pomerantz offers us an example of a systemic, carefully conceived coaching project engaged inside a specific organization. Excerpts from this case study were published in Forbes. We suggest that this more detailed analysis yields even greater insights regarding the provision of coaching services inside organizations, though we certainly are impressed with the honoring of Ms. Pomerantz’s work by a notable business magazine such as Forbes.

[Coordinated Coaching Increases Trust with Organizations]

Fourth, is an essay written by one of us [WB}, which was previously published in the Library of Professional Coaching. Titled, “Premortem and the Change Curve,” this essay has receiving some attention as an initial application of behavioral economics to professional coaching. It focuses on several important dynamics operating in any organization that is engaged in innovation (as virtually all organizations must do in our current fast-changing global environment).

[Premortem and the Change Curve]

Finally, we offer a coaching tool—as we often do in the Future of Coaching. This specific tool yields an organization-wide assessment of organizational effectiveness. Specifically, it is a survey instrument that is based on concepts identified by Cathy Jameson—a major player in the area of coaching and consulting to health care practices.

The Organizational Effectiveness Inventory

We hope that you find that these diverse offerings yield useful insights for you as you deliver your own professional coaching practices or are deciding how best to use coaching services in your own organization.

Ten Trends Driving Organizational Coaching

by Carol Goldsmith, PCC, NLPT

About this Report

What does the future of coaching in organizations hold? This white paper synthesizes what surveys are saying with what coaching leaders are thinking about emerging trends.

The survey results cited come from the International Coach Federation (ICF), Human Capital Institute (HCI), Conference Board, DDI, Sherpa Institute, American Management Association, Deloitte, and DDI.

The stories behind the statistics come from confidential interviews with dozens of North American coaching leaders, plus panel presentations on The Future of Coaching in Organizations at the 2015 Capital Coaches Conference in Washington, D.C.

Interviewees represent market leaders in aviation, defense, energy, environmental engineering, financial services, health care, management consulting, pharmaceuticals, technology, and telecommunications, plus non-profit organizations and agencies in the U.S. and Canadian governments. Each person addressed three key questions:

* How does your organization use coaching today?
* What is the outlook for coaching in your organization over the next 2-3 years?
* Looking into your crystal ball, what do you see as the future of organizational coaching?

To a person, these subject matter experts were eager to share and compare experiences with their industry peers. The hope is that this paper will enlighten and stimulate discussion among the leaders who are creating the future of coaching in organizations.

Executive Summary

This research revealed 10 important trends:

1. Coaching cascades through organizations

Coaching is no longer reserved for the C-suite. As Baby Boomers retire, emerging leaders and millennial managers are benefitting from coaching.

2. Coaching goes strategic

One in five ICF/HCI survey respondents finds it "very difficult" to secure funding for coaching. Those who successfully found funding did so by linking coaching to key strategic goals.

3. Coaching becomes a key leadership competency

Coaching skills are being recognized widely as leadership skills. Yet only one-third of leaders today display proficiency in core coaching competencies.

4. Coaching skills training expands

Workshops on coaching skills for managers and leaders are becoming staples of many leadership development programs.

5. Coaching cultures gain traction

The term "coaching culture" has entered the corporate lexicon, thanks to studies showing that organizations with strong coaching cultures have higher levels of revenue and employee engagement than those that do not.

6. Coaching professionals come indoors

To contain costs while satisfying growing demand for coaching, organizations are expanding their internal coaching capabilities.

7. Coaching Centers of Excellence (CCOE) emerge Organizations are experimenting with different models for standing up a CCOE.

8. Coach mentoring and coaching supervision grow Internal coaches want to receive mentoring and supervision from external coaches in their quest to be the best at their job.

9. Coaching metrics evolve

Leaders look beyond ROI metrics for meaningful ways to measure the value of coaching.

10. Coaching enters the digital age

New technologies are changing the coaching experience.

Let's explore each of these top 10 trends.

One: Coaching Cascades Through Organizations

No longer is coaching just a C-suite perk. For much of its 20-year history, coaching in organizations had been reserved for the CEO, COO, CIO, and other chief officers who sit at the pointy part of the plane. Now coaching is being "democratized."

More than 40% of respondents to the American Management Association's Global Coaching Survey reported that coaching is being used at all leadership levels – from managers on up.

Demographics explain why. The current exodus of Baby Boomers from the workforce and elevation of Gen Xers into top slots have put the spotlight on developing younger leaders. According to Deloitte's 2015 report on Global Human Capital Trends, 50% of millennials say that within their first few years on the job, they are managing 3-4 direct reports whom they don't know how to lead.

This is where need and opportunity converge. Human capital leaders recognize that frontline and mid-level managers need to develop the foundational skills that will help them lead in the future. DDI ranked "coaching and developing others" as the number one way to do that in its 2014/15 Global Leadership Forecast. Other studies support these findings.

The Sherpa Institute has been surveying global organizations for 10 consecutive years for its Executive Coaching Survey. Survey respondents estimated in 2008 that 27% of senior managers in their organizations had received coaching in the past year. In 2015, a record 2,000 survey respondents reported a 10-point jump – to 37% of senior managers receiving coaching in the past year. While executive-level coaching also has increased (from 19% to 26%), coaching for managers is growing twice as fast.

The Conference Board surveys the world's largest organizations every two years for its Executive Coaching Survey. In 2014, 43% of the 142 multinationals responding to the survey reported a jump of 16% in their use of internal coaches to develop managers.

The 2014 ICF/HCI report on Building a Coaching Culture also predicted healthy growth rates for organizational coaching. Of the 500 survey respondents:
* 81% will expand the scope of managers/leaders using coaching skills
* 72% will expand the scope of internal coaching
* 35% will increase the scope of external coaching. As coaching reaches up and

down the leadership ladder, the emphasis is on strengthening the middle rungs. Learning experts agree that providing coaching early in one's career is one of the most effective ways of preparing today's managers to be tomorrow's leaders. DDI says that missing the window to close the skills gap "can be a costly mistake" in the long run.

Two: Coaching Goes Strategic

Recognizing the value of coaching is one thing. Funding it is quite another. Nearly one in five respondents to a 2015 ICF/HCI survey of 300 organizations said that it is "very difficult to find or secure funding for coaching in the organization." The biggest mistake that coach evangelists make is to think that the power of coaching will sell itself.

An Organization Development (OD) manager at a Fortune 100 firm spoke for many peers in saying, "Those of us who've been trained and transformed by coaching are so passionate about it that we think our bosses will immediately see the benefits. They don't. We can't sell coaching by saying how much happier and healthier our employees will be. We need to make the business case." NASA learned that lesson long ago.

Coaching was already being used in all 10 NASA centers in the 1990s – albeit in very different ways. Leaders from each center convened at the turn of the 21st century to create a strategic vision for using coaching organization-wide to achieve NASA's tripartite mission of building great leaders, achieving technical excellence, and creating an effective organization. Each center appointed a coaching manager to bring NASA's coaching initiatives into alignment and regularly share best practices. Today, internal and external coaches provide a full spectrum of integrated coaching services to support NASA's key strategic goals.

Strategic thinking, plus dogged efforts, also led to coaching success at a leading tech firm. Says an OD manager there, “The first time I pitched a pilot program for coaching, it was based on passion. I received a polite turn-down. The next time,” she said, “I linked internal coaching to an employee insight survey showing that for a majority of employees, career development is a critically important area that we don’t do well.” Now an internal coaching program tied to improving that metric is in the pilot stage.

Then there is the financial case to be made. Ironically, one prominent financial services firm didn’t know how much it was spending on coaching until an HR staffer was asked to investigate. “My back-of-the-napkin calculations showed that we were spending millions of dollars on external coaches,” she said. “Rates were all over the board – from $100 an hour to $75K for a 6-month engagement. HR had zero knowledge about who these coaches were, what they were working on, or what we were paying them. I made the case that we could do it for half that amount.” She estimates that aligning external coaching rates and assigning coach-trained HR staff to coach lower-level employees saved the firm $600K during the first year of the program.

Following are three examples of coaching champions successfully linking coaching to key strategic goals.

Talent management

Acquiring, developing, and retaining talent are the trifecta of corporate HR concerns. In the span of one lifetime, we’ve gone from our grandparents’ tradition of working for one sole employer until retirement, to today’s young workers changing companies every few years. According to Deloitte’s 2015 Global Human Capital Trends report, millennials consider a loyal employee to be someone who stays with the organization for seven months.

Changing demographics and business environments are creating leadership shortages in key economic sectors. DDI identifies health care, manufacturing, and STEM (science, technology, engineering, mathematics) as critical areas where organizations need to accelerate leadership development and attract talent from nontraditional sources.

So how can organizations entice top talent to join – and emerging talent to stay – in a tight labor market? “Salary isn’t always the deciding factor,” says a Fortune 100 executive recruiter. “Often it’s professional development and personal growth. Many desirable candidates are coming in with the expectation that a coach will be part of their package. Coaching can be a real differentiator in the market.”

An HR manager at a Big Four accounting firm adds that “coaching also can be a great retention tool.” Senior associates at the firm receive several group and 1-on-1 coaching sessions upon getting their first promotion. “Sometimes,” she says, “what causes people to stay is the sense that the firm is investing in them.” Small wonder that DDI rates the “Heavy Use of Internal Coaching/ Mentoring” as a top distinguishing trait of Best Places to Work.

Onboarding & Transition

Acclimating to a new culture or job is often a haphazard, figure-it- out-for-yourself affair. Not at CareSource. This Ohio-based managed health care firm uses professional coaching to support its onboarding and transition strategy. Hiring was exploding under health care reform in 2008, explains Matt Becker, CareSource Coaching & Mentoring Manager and co-chair of the ICF Internal Coaching Community of Practice (CoP). “We were promoting a lot of people into new leadership roles, as well as bringing in people from the outside,” he explains. “In 2009 we introduced a coaching program to help new hires understand what we wanted and needed from leadership.” Coaching grew so quickly that Matt began coaching nearly full time a year later and hired a second ICF-credentialed coach in 2014.

Customer Care

Coaching has completely transformed the customer care experience at Rogers Communications, Canada's preeminent wireless and cable provider. Call center agents had not been taking their managers' advice on how to improve customer satisfaction. Rogers wanted to turn that around by training managers to "ask, not tell" agents what to do.

Starting in 2013, managers were trained in the ICF core coaching competencies and tasked with spending 30 minutes per week, per call center agent, in coaching conversations (approximately 8-9 hours of their time per week). Managers would observe the agent on actual customer calls and then debrief the call by asking coaching questions like: "What do you think went well? What could you improve? What will you do differently next time?"

Evaluations have shown remarkable results. Each call center site exceeded its own historical performance levels, as well as the performance of other sites where coaching had not yet been deployed. Revenues increased by double digits over comparable periods year-over-year. With a reported 9% increase in employee engagement, 40% decline in attrition rates, and 400% increase in customer satisfaction, Rogers earned an ICF Global Prism Award for excellence in organizational coaching.

Three: Coaching Becomes a Key Leadership Competency

Ask people to describe the best leader they've ever had and you'll hear comments like: "She's a great listener. He asks a lot of questions. There's authenticity. You walk away feeling like you've been heard, so that even if you disagree with the ultimate decision, you can support it."

Coaching skills are being recognized widely as leadership skills. The old top-down, command-and-control management style of yesteryear is giving way to a more collaborative, interactive style of leading that utilizes coaching skills. DDI defines managing as time spent planning and doing administrative tasks, and interacting as engaging in coach-like conversations. In surveys, leaders/managers estimate spending 41% of their work time managing, and nearly 20% of their time coaching. Given a preference, they would flip those numbers – doubling the amount of time they spend interacting with employees, and halving the time they spend managing them.

The term manager-coach is now in common use. The Conference Board defines a manager-coach as "a leader who works with his or her subordinates within the organization to create awareness and support behavior change [using] coaching knowledge, approaches, and skills."

More organizations than ever now expect their leaders to coach their people effectively. In a 2015 ICF/HCI survey, 84% of respondents said that coaching is part of a manager/leader's job – up 2% from the previous year.
Still, most leaders lack core coaching skills.

DDI has evaluated thousands of leaders in simulated work environments to assess their proficiency in such coaching competencies as active listening, responding with empathy, building trust, and providing support without removing responsibility from the coachee. The result: fewer than one in three leaders displays high proficiency in those areas. [DDI Global Leadership Forecast 2014/15] Not surprisingly, this gap leads to the next emerging trend…

Four: Coaching Skills Training Expands

Workshops on developing coaching skills are being added to many leadership and business development programs. Generally speaking, these are one- or two-day trainings where participants practice the core coaching competencies of asking questions, listening, and recapping what they've heard the coachee say to ensure shared understanding. This training trend is especially strong in the areas of health care, technology, and management consulting.

Just as CareSource uses coaching to develop its leaders, Canada's progressive Nova Scotia Health Authority has one full-time coach and several coaches-in-training to help physicians transition into leadership roles. LifeBridge Health, owner of four large Maryland hospitals, embeds coaching skills training in its leadership development for physicians. Many former MDs and surgeons now specialize in the niche of coaching physicians. An online coach training program has even sprung up that leads to the designation of Professional Medical Coach (PMC). "A physician could be in the operating room in the morning and in the boardroom that afternoon," explains one coach. "Coaching can help physicians learn leadership and self-management skills that will help them be effective in both places."

In the oil and gas sector, a mid-sized management consulting firm wanted to expand its business opportunities with a finite customer base. "Selling our clients on new ideas required talking and working with them differently," says a corporate VP. The pitch was made to train internal managers in coaching skills. Project managers (PMs) are now put through a training program called Coaching with an Edge™ that focuses on core coaching competencies. One week of practice coaching their colleagues on actual work challenges is sandwiched in between two weeks of classroom training. Trainees must document tangible results with their coachees in order to complete the certification program. Once certified, PMs are assigned to a project team to prepare, attend, and debrief client meetings using their new coaching skills. Sales metrics measure the degree to which additional business results from the coaching engagement.

Three years into the program, 110 of the firm's 200 managers have gone through coaching skills training. The goal is to have everyone certified by the end of 2016. Google, Microsoft, Cisco, Oracle, and Hewlett-Packard are among the name-brand tech firms that leverage the power of coaching in their leadership development programs.

One of these firms trains leaders at all levels to use a peer coaching process called Action Learning to help people solve their own problems by asking questions, rather than giving advice. Typically, a group of 4-8 peers from different parts of the organization form an Action Learning team. One participant presents a real-life problem or challenge. Team members then help the problem owner refine, reflect, and ultimately resolve their challenge by "asking, not telling" them what to do. The less that teammates know about the issue, the better – as it keeps them in coaching (and out of advising) mode. More than 100 certified Action Learning coaches inside the organization now work with teams from the U.S. to China. "Asking questions had been kind of counter-culture here," says one early Action Learning coach. "Over time, we started hearing people say, 'This is changing how I think about myself as a leader.' And that's been very impactful to our culture."

Five: Coaching Cultures Gain Traction

Increasingly, organizations talk about the need to "create a coaching culture." Why? Because coaching cultures make good business sense. Coaching leads to higher employee engagement levels. Higher engagement levels increase retention, productivity, and profits. According to research from The Conference Board:

* 60% of surveyed organizations report that their managers/leaders leverage coaching skills to help improve employee engagement.
* 60% of employees in organizations with strong coaching cultures see

themselves as highly engaged, vs. 48% of employees in all other organizations.
* 63% of organizations with strong coaching cultures reported higher revenue growth than their industry peer group in 2014, compared to 45% of all other organizations.

Of course, an organization can always claim to have a coaching culture without fully understanding the term. One long-time coach was told upon joining a name-brand firm that she would have a relationship coach, career coach, and mentor coach as part of her onboarding process. Soon, she discovered that these "coaches" saw their jobs as answering questions and explaining how things are done around here. Likewise, a young manager tells of emailing a report that he had written to his boss, and getting back a heavily redlined version under the subject line: Coaching Tips.

Among respondents to the ICF/HCI Building a Coaching Culture survey, only 13% reported having a strong one. Building a coaching culture takes time, commitment, and an internal champion who understands what coaching is – and is not.

One major success story shows how a coaching culture evolved at an international environment consulting firm. Its global HR director had come on board after having a transformational coaching experience that changed his relationship with work. "One of my strategic objectives in coming here was to create a coaching culture," he says. Four years later, he has the following infrastructure in place: 1-on-1 coaching for high-potentials. External coaching is provided to 21 high-potentials ("hi-pos") in the firm's Global Leadership Development Program. About 60% of Global Leadership graduates retain their coaches afterwards.

Coaching skills workshops for top leaders. Half of the firm's 170 principals and partners have attended a 2-day training to incorporate coaching skills into their leadership style. Leadership champion training. Another 2-day coaching skills workshop for executives trains "leadership champions" to coach Global Leadership participants and graduates, as well as directors in the firm. Those directors in turn are expected to take a coaching approach to developing their staff and teams. Individual coaching. A "significant" number of employees request and receive coaching to support their individual development plans. Leadership and management coaching is recommended for the top two levels of managers.

While personal experience inspired the HR director to champion a coaching culture, it was C-suite support that made it possible. "From Day One, I had support for these initiatives from my COO – despite skepticism from my CEO," he adds with a laugh. "But once the CEO started seeing positive behavioral change, he became a fan of coaching. Now he's very supportive."

Six: Coaching Professionals Come Indoors

HR leaders agree that "the appetite for coaching is growing." As one HR manager put it, "Coaching has gone from being perceived as a remedial measure for people who are under-performing, to a status symbol for hi-pos.

People are now coming up to us and asking, 'How do I get a coach?'"
A federal government coaching manager concurs. "We're actually trying to keep the coaching program under wraps," he says, "because we can't afford to give coaches to everyone who wants one." And therein lies the challenge. Demand for professional coaching far outstrips the supply of dedicated funds.
As mentioned, organizations typically spend $15K per quarter on an executive coaching engagement. "With hourly rates of $500 and above, external coaches are too costly for anyone but our top execs," says a corporate OD leader. "So, we're developing internal resources to meet the growing demand for coaching at

lower levels of the organization."

Which leads to perhaps the most significant of our top 10 trends: the growth of professional internal coaches. ICF uses the term "coach-practitioner" to distinguish professional coaches with a minimum of 60 hours of coach-specific training from managers/leaders who have taken a one- or two-day coaching skills workshop. As the ICF website states, "There is no single, industry-wide standard" for training internal coaches.

That said, here's a look at three viable approaches that large organizations are taking to create an internal coaching bench:

Hire full-time credentialed coaches

On the high end of the cost spectrum is the approach of recruiting or developing credentialed coaches to work as full-time internals. Typicall,y the job description includes delivering coaching skills workshops, group and team coaching, and 1-on-1 coaching to senior managers on up to directors. External coaches generally work with upper-level executives (SVPs through C-suite). Boeing, Northrop Grumman, and Capital One are among a handful of large corporations with full-time internals earning six- figure salaries. The CEO of Capital One became a coaching champion after experiencing its benefits himself. Now the firm has four full-time ICF-credentialed coaches on staff. Even when the banking industry was under extreme pressure to costs, the coaching program wasn't touched.

Develop part-time credentialed coaches

A less costly and more common approach involves training full- time employees to coach as part of their jobs. This may involve:

* sending employees to an accredited coaching school (at a cost of $10-15K per person)

* bringing in an accredited external coach training company to deliver internal training
* developing an internal coaching curriculum that meets the standards of ICF or another credentialing body

Deploy coaches already on staff

Most organizations prefer the low- or no-cost option of having current employees with coaching credentials coach on top of their full-time jobs. Often a coach who works in OD, HR, or Learning & Development (L&D) spearheads the recruitment effort by asking for a show of hands among staff who want to coach internally. Such was the case with Cisco lead coach Beth Huebner, who shared her story at the 2015 Capital Coaches Conference. "We put out the word that we were looking for people who were interested and qualified to coach in addition to their current jobs," she said. "Out of 75,000 employees, we found 30 who had certifications in coaching or psychology. They're now listed as internal coaches on the Cisco website. Any manager can click on our website and register to get six sessions of coaching and a 360 assessment. This is all volunteer-based; coaches get no pay for this. It's all for the love of coaching."

The U.S. federal government takes a similar approach. The Federal Coaching Network is compiling a registry of federal employees across the civilian and defense space who possess the 60 hours of coach-specific training required for ICF membership. Once the registry is complete, federal employees will be able to arrange pro-bono coaching on their own time with a trained coach. European organizations are way ahead of the internal coaching curve. Speaking at the 2015 World Business and Executive Coach Summit (WBECS), a panel of global coaching directors from Google, GlaxoSmithKline (GSK), and PwC (Pricewaterhouse Coopers) reported that 79% of companies in the U.K. are increasing their use of internal coaches. Many veteran external coaches wonder if the trend toward developing internals represents a net positive or negative for the coaching profession. The widely shared answer: both.

On the plus side, mid-level employees who wouldn't otherwise have access to a coach get the benefit of internal coaching. "It's good for everyone because it's expanding the pie," most coaches agree. Also, internal coaches who need practice and hours toward their coaching credential have access to a ready-made clientele.

On the minus side, internal coaches generally have less training and experience than external coaches. People who coach on top of their full-time jobs spend a small fraction of their work week coaching – often only 1-3 hours a week. Federal employees must coach on their own free time. "That means evenings and weekends," says one coach working in the Defense Department. "It's very hard to accumulate hours when your time is so limited.
It's also hard, with so little practice and no supervision, to develop your skills as a coach."

With these constrictions, how do organizations foster and maintain excellence in internal coaching? Enter the next two trends.

Seven: Coaching Centers of Excellence Emerge

Wikipedia defines a Center of Excellence (COE) as an entity "that provides leadership, best practices, research, support, and/or training for a focus area. [Also] known as a competency center or capability center."

Now, Coaching Centers of Excellence (CCOE) are beginning to emerge in organizations such as Accenture, Ernst & Young (EY), GSK, and PwC. What these coaching centers share is a commitment to building internal coaching capabilities in the ways that Wikipedia describes. Where they differ is in their respective locations on the org chart and business models for deploying their coaches.

Says a leader in one CCEO, “It used to be that coaching was part of the HR domain, and you got it because there was a problem. We had to change the mindset in our organization from coaching being remedial to it being a reward and development opportunity.”

To distinguish between the two, “remedial” coaching usually remains within HR and gets delivered by external coaches and/or coach-trained HR staff. “Leadership” or “executive” coaching below the upper echelons is delivered by coaches who work in a CCOE housed with OD, L&D, or a business strategy unit.

Four business models are evident:
The first model treats coaching as an investment in developing the organization’s current and coming leaders. EY formed its CCOE in 2009 with seven coaches focusing on partner transitions (i.e., those who are entering the partnership, repatriating, joining the firm from outside, or rejoining after a leave of absence). Currently 19 full-time EY internal coaches spend about 70% of their time delivering transition coaching to leaders throughout North and South America. They also have responsibilities to develop and mentor nearly 90 part-time in-house coaches, who play a role in coaching managers and senior managers. EY calls on a list of roughly 15 external coaches for other types of work.

The second business model treats coaching as both an internal resource and an external revenue stream. CCOE coaches may work one day with an internal leader, and the next day with external leaders who want to create a coaching culture in their own organizations. Leaders at one CCOE in the management consulting world are now pricing out a menu of client services ranging from providing coaches on contract, to building coaching skills in identified leaders, to helping clients set up internal coaching programs of their own. Says a veteran in the firm, “Management consultants already know that using coaching skills helps to develop more business with clients. Now the question is whether clients will pay us to help them develop their own coaching culture and/or build their own internal coaching resources.”

A third business model relies on cost-shifting or covering the coaches’ salaries in creative ways. One large organization that spent $2 million to stand up its CCOE actually saved money by replacing 12 externals with 12 full-time employees who spend 50- 60% of their time facilitating internal trainings and workshops.

When not facilitating, these internals coach hi-pos and partner candidates. “Our hope,” the center’s director explains, “is that leaders who get coaching will realize that they can’t get along without a service they didn’t know they needed.”

A fourth business model builds on the trend of adding coaching duties to someone’s full-time job. Fittingly, such employees are called Job Plus coaches at one multinational firm. The center’s director shared how this CCOE started five years ago: “Coaching began here as a response to a global survey showing that while our leaders and managers performed effectively in their jobs, they scored low in developing people,” he says. “We were already using coaching to develop our senior leaders. How could we bridge the gap and offer coaching to anyone who wants it?”

Championed by an enterprising leader in the U.K., the organization set about developing a pool of certified internal, external, and Job Plus coaches all trained in the ICF core competencies. Some 500 employees have since completed a 3-day intensive coach training, plus 3 months of peer coaching, followed by 3 supervision sessions conducted by credentialed external coaches. (More on supervision below.) Trainees are then assessed for certification as a Job Plus Coach. In 2015, this team of 500 completed roughly 1,500 global coaching engagements.

Eight: Coach Mentoring and Coach Supervision Grow

Emerging leaders aren't the only people in organizations who need coaching and development. So do internal coaches. A group of federal coaches all voiced similar concerns about their own professional development at the 2015 Capital Coaches Conference:

* "How do we know whether we're doing good coaching?"
* "How can we get feedback and mentoring to hone our coaching skills?"
* "How do we continue our professional development?"
* "How can we safely think through dilemmas and options without going to our boss?"

To address these needs, most CCOEs provide ongoing coach mentoring and coaching supervision. ICF defines the two terms this way:

* Mentor Coaching focuses on the development of coaching skills mainly in the context of initial development.
* Coaching Supervision is the interaction that occurs when a coach periodically brings his or her coaching work experiences to a coaching supervisor in order to engage in reflective dialogue and collaborative learning for the development and benefit of the coach and his or her clients. In Coaching Supervision, the coach is invited to focus much more on what is going on in their process and where the personal may be intruding on the professional.

In coaching supervision, an experienced coach (usually external) meets regularly with a group of internal coaches to review case studies and issues from their practices. (The coaching agreement protects client confidentiality.) Peer coaches offer questions and feedback to the presenting coach, while the coach-supervisor facilitates the call and provides subject matter expertise. Internal coaches express a strong preference for working with a qualified external coach-supervisor (rather than a boss or other employee) in order to gain perspectives from outside the organization and increase their own feelings of safety. ICF either requires or recommends that its members get mentor coaching at all three levels of credential (ACC, PCC, MCC).

Supervision is not required as a condition of ICF membership, as it is in professional psychology and counseling associations. That may soon change. Not only is coaching supervision encouraged in Europe and other parts of the world; it is required by many hiring organizations. Says a coach in a multinational CCOE, "We work in the U.K. with the retail giant Marks & Spencer, several banks, and civil service organizations that all have internal coaching programs similar to ours. Coach mentoring and coaching supervision are both part of the mix."

Nine: Coaching Metrics Evolve

In a poll at the Conference Board's 2014 Executive Coaching Conference, attendees were asked to name the top challenges facing their coaching programs. The winner (31%): Measuring the impact of coaching.
Coaching leaders know that metrics matter. They also know that coaching defies hard ROI calculations. "Sure, you can measure and put a number on anything," says one coaching expert, "but what does getting a 500% return on your investment in coaching actually mean?"

Organizations have long struggled to quantify the dollar benefits of this highly personal approach to development. More than 27% of respondents to an ICF/HCI survey said that they do not evaluate the effectiveness of coaching at all. Among those who do, most rely on subjective feedback from either the coachee (58%) or the coach (42%).

Soft measurements on employee satisfaction, engagement levels, and feedback surveys are seen as much better measures of coaching than ROI. But how well do these measurements help to build the business case? One OD leader speaks for many in saying, "We need to find meaningful ways to demonstrate value if we're going to justify more money for coaching."

Here's a look at how organizations are measuring coaching now:

360 feedback surveys

Assessment instruments and feedback surveys from supervisors, peers, and direct reports are still the most popular means of evaluating the effectiveness of coaching. Respondents to the Sherpa Institute's 10th annual Executive Coaching Survey in 2015 said that 360 assessments figure into 30% of engagements. Unfortunately, such assessments do only half the job. Most surveys and stakeholder interviews are conducted on the front-end of the coaching and not after the engagement ends.

While coaches know which behaviors their clients need to change, they don't know whether or how they've changed in the real world over time. Has the client really taken the promised actions? Are others in the client's work environment seeing the same changes that the client perceives in him or herself? Are new behaviors sticking when old buttons inevitably get pushed? Investing in both pre- and post-coaching surveys or interviews can help organizations better assess the longer-term results and real value of their coaching investment.

Performance reviews

While still widely used to evaluate the effectiveness of coaching (by 21% in the Sherpa survey), the annual performance review may be going the way of the dinosaur. “We’re blowing up the old system and finding new ways to engage people in ongoing development and performance conversations,” says one OD manager in a leading management consulting firm.

Scorecards and competitive rankings are being replaced by frequent feedback conversations between boss and employee. The trend is especially strong in sectors like technology and professional services, where the workforce is young (80% of PwC employees are millennials) and turnover is high.

Recognizing millennials’ preference for transparency and collaboration, one global technology manufacturer uses an open forum of peer reviews in which managers calibrate each other’s performance. This type of feedback could be used in the coaching engagement to help the coach and client assess progress and course-correct as the engagement proceeds.

Comparative group surveys

Surveys to assess employee morale, well-being, and engagement levels are used by 19% of Sherpa respondents to evaluate the effectiveness of coaching. The most sophisticated organizations use control groups to measure performance differentials between employees who have, and have not, been coached. The control groups are then compared on key metrics such as retention levels, promotions, pipeline readiness, revenue gains, etc. Canada’s Rogers Communications, mentioned earlier, compares customer satisfaction levels in corresponding quarters year-over-year as one key measurement of coaching ROI.

Pulse surveys

Many CCOEs use online surveys to take the "pulse" of participants at key points in the coaching. The coach begins the engagement by conducting three conversations: a 1-on-1 rapport meeting with the client; a 1-on-1 meeting with the client's supervisor or sponsor; and a 3-way conversation in which coach, client, and sponsor all agree on goals. The data is then loaded into a system, and a survey is sent to both coachee and sponsor at the mid-point and end-point of the engagement to gauge progress and assess results.

Perceived value

Still, the simplest and most widely used metric is how the individual client evaluates the coaching experience. The former director of coaching at Humana speaks not of ROI, but of ROC (Return on Coaching). He found that organization-wide, employees consistently attributed "56-58% of the impact they're having solely to their coaching experience." While certainly subjective, this metric nonetheless helps the organization compare the perceived value of the coaching experience to its actual cost of delivery.

Ten: Coaching Enters the Digital Age

Technology-wise, there are three kinds of coaches: high-tech, low-tech, and no-tech. In the past, all a coach really needed to set up shop was a client, pad of paper, and pen. Many coaches eschewed coaching by phone. As recently as three years ago, 93% of Sherpa survey respondents coached their clients in-person all or part of the time. Today, that number has dropped to 40%. Virtual coaching via high-definition video conferencing, Skype, and Facetime is overtaking in-person coaching. And that's just the tip of the trend line. Coaching is poised to experience a tech revolution. Experts such as Dr. David Petersen, director of executive coaching and leadership at Google, see unlimited possibilities for coaches to leverage new technology to reach clients and reinforce desired behaviors. A CoachTech panel at the 2015 Capital Coaches

Conference spoke of high-tech tools for delivering learning prompts, homework reminders, provocative questions, and feedback in between coaching sessions.

Pick a behavior you want to support and there's probably an app for that. Here are a few examples on the market today: Headspace is a popular smartphone app that teaches clients how to calm their nerves and clear their heads through meditation. It offers 10 meditation practices in 10 lessons lasting 10 minutes. Similarly, the iPhone app Breath includes 15 meditation recordings of varying lengths, like Mindful Breathing, Body Scan, Be Present, Mindful Walk, and Gratitude. HeartMath incorporates biofeedback technology into its Inner Balance App and Sensor to show clients their heart rhythm patterns as they experience various emotional states. Clients can plug into their smartphones or computers to get "real-time coaching" (though not a real coach) on how to change, and eventually control, their state.

SuperBetter uses gaming technology and neuroscience to build the user's "resilience muscle." Described as a game that you play in real life, SuperBetter provides quests, tests, and tracking programs that assess the coaching client's progress on managing everything from moods to To Do's. Higher game scores indicate higher levels of strengths and skills.

Also building on behavioral science is an online program called Tiny Habits. Developed by Dr. B.J. Fogg of the Stanford Persuasion Tech Lab, it operates on the idea that the easiest way to install a new habit is to piggyback on an existing one. Take the example of a person who wants to adopt the bedtime habit of flossing. Tiny Habits suggests that the person add just one small step to his or her nightly brushing routine – such as flossing one tooth – and then report to the coach on whether or not s/he did it. Since flossing one tooth takes about the same amount of effort as flossing them all, a new habit gets established one tiny step at a time.

Finish Agent supports and strengthens client accountability using the power of peers. This group coaching platform grew out of a coach's experience helping doctoral students complete their thesis. Recognizing the students' common struggles and needs, she created an integrated platform that supplements live group coaching sessions with an online daily progress grid, coaching questions emailed to the group, peer support, a discussion forum, and a chat room for groups of people working toward any type of common goal (book project, weight loss, etc.). The software can help coaches expand their practice, and clients connect with other people like them.

Ternio (like Uber) leverages our modern desire for instant gratification by providing a coach on demand. Users can choose a coach from a database of bios, click to connect, and pay for the session via the credit card on file.
And then there's the evolving realm of neuroscience and coaching. Dr. Dario Nardi, a neuroscientist and neuro-technology pioneer who teaches at UCLA, uses imaging technology to conduct brain-based assessments. Picture a client who is wearing a wireless headset doing random tasks while a computer records his or her brain functions through an EEG. The data is then uploaded to a cloud website, and a report is generated that offers the client customized coaching suggestions to improve performance.

Writing in HR magazine, Dr. Nardi explains that "like the mobile app Shazam, which can rapidly identify just about any song, brain imaging is coming to the fore to deliver similar magic for identifying our skills and personality traits. Its growing use in work and educational institutions will be facilitated by sophisticated wireless, consumer-friendly technologies."
Virtual reality (VR) could be the next frontier in coaching.

Game enthusiasts have long been wearing VR goggles to experience all kinds of virtual adventures. A CoachTech panelist invited the audience to imagine the motivational and behavioral impact of having coaching clients use VR technology to see, hear, feel, and fully experience themselves accomplishing a big stretch goal in advance of taking action. As product development costs continue to drop, many experts believe that VR will soon bring the client's future into the now.

Future Trends

At the start of this research project, coaching leaders were asked to share their thoughts on three key questions:

* How does your organization use coaching today?
* What is the outlook for coaching in your organization over the next 2-3 years?
* Looking into your crystal ball, what do you see as the future of organizational coaching?

Responses to the first two questions generated our list of 10 top trends. The crystal ball question sparked the following thoughts and predictions for 2020 and beyond:

Everybody wants a coach

Just as Google CEO Eric Schmidt tells a YouTube audience that "everybody needs a coach," soon everybody will want one. "After years of pushing this rock up a hill," says a Fortune 100 coaching manager, "leaders who've been telling me this is not the right time to scale up are now saying, 'We need and want coaching.' Directors and managers are saying, 'I don't have time for classes. I need a trusted advisor.' Employees are saying, 'Help me manage my career.' HR is saying, 'We want people to come here because they are going to grow. We need to invest in our managers as leaders.'"

In the not-too-distant future, coaching will become a routine part of MBA and doctoral programs, and a must for current and aspiring C-suiters. Cisco's Beth Huebner predicts that "coaching will be mainstream in the next 5-10 years."

Leaders have a coaching mindset

Tomorrow's leaders won't just have coaching competencies. They will have a coaching mindset – one that evolves and adapts to constant change in the VUCA age (volatility, uncertainty, chaos, and ambiguity). "The earlier that leaders experience coaching and coaching skills training in their careers," says one OD manager, "the sooner they will take a coach-like approach to developing the next generation of leaders." Coaching will be woven into all future leadership development programs, and a growing number of leaders will decide to get trained as a coach.

Coaches embrace consulting

"Pure" coaching will give way to a "hybrid" model that combines coaching and consulting approaches – especially for C-suite clients. No longer will coaches feel obliged to check their prior career experience at the door. Those with particular subject matter expertise will market themselves as informed thought partners and sounding boards to leaders in the sectors that they know best. "Business leaders want that mix of industry experience and great coaching credentials," says Marshall Calman of CoachSource. "They expect some level of advice at appropriate points. If the coach has some insight or advice that the client hasn't known to ask for, we've come to the point where it's OK for the coach to say, 'We have similar backgrounds. I have a thought or two.
Would it be OK to share?'"

ICF Global's CEO, Magdalena Mook, agrees that it's fine for coaches to switch hats between coaching and consulting when needed – provided that they clearly distinguish between the two and seek clients' permission before offering advice. Coaches who model professional coaching can set a powerful example for clients in leadership roles who are expected to coach as part of their job.

Coaching credentials matter

Internal and external coaches in the near future will be expected to earn certifications from an independent, accredited credentialing body such as ICF. Already the U.S. government requires ICF certification in most of its calls for coaching proposals. Corporate coaching managers have been busily weeding out self-proclaimed, uncredentialed leadership coaches who got their foot through the revolving glass door through C-suite connections. As one corporate coaching manager says, “You wouldn’t hire a plumber or lawyer who hadn’t received the proper training or certification. Why would you hire a non-credentialed coach?”

External supervision becomes the norm

The addition of coaching duties to managers’ and leaders’ jobs will increase demand for coaching supervision from a qualified outside provider (vs. the internal coaching program manager). Internal coaches share widespread concern over their bosses either providing, or attending, coaching supervision sessions in which personal issues and concerns are shared. “You don’t want the person you report to being part of those conversations,” says one internal coach. “We need that safe, sacred space to explore issues in total confidence.”

Most observers agree that coaches who possess that rare combination of coach mentoring, training, and supervision skills – along with prior experience working as a full-time internal coach – will be in the best position to understand and meet the unique challenges of the internal coach.

Coaching buyers know their stuff

“Clients are becoming more sophisticated in their coaching decisions,” says Dr. Amanda Buschi, director of coaching for North America at Right Management.

“It used to be that clients came to us just for external coaches. Now we’re having more strategic conversations about the use of internal and external coaches, developing coaching skills for managers, and cascading coaching through the organization.” Just as Amanda earned her doctorate in coaching studies, an increasing number of OD, L&D, and HR professionals will pursue advanced degrees in coaching. “While I don’t think we’ll see a Chief Coaching Executive,” one OD leader observes, “we will have more people at the table who possess a deep understanding of coaching.”

Team coaching goes global

Whereas most coaching and coach-training engagements focus on developing the individual, future leaders will seek the help of coaches in building cross-functional and cross-geo teams. “Most of the coaches I know have more of an OD and systems theory background,” says one longtime expert, “and aren’t really equipped to help companies build global teams that are agile and well-equipped to work across cultures.” She believes that opportunities will only grow for coaches who possess the cultural awareness and cross-cultural skills to work with virtual global teams.

Big data drives coaching

“There’s long been a belief that there’s no place for data in coaching,” says a coach-consultant in the data field. “Yes there is. You can identify the drivers of behavior in any organization – the drivers of engagement, retention, attrition, business results, teamwork.” She sees a big trend in organizations moving away from individual 360s, which are just about one person, and toward using focus groups and surveys to analyze and understand precisely what is needed to drive desired results.

Coaching becomes an employee benefit

Some leaders envision the day when coaching becomes as common in large organizations as a health club, cafeteria, or child care center. Notes one HR director, “Progressive companies recognize how providing everything from massages to meals benefits productivity and morale. Why not offer coaching, as well?” At least one university in southern California already does. And California, as we know, is where trends are born.

Final Thoughts

Perhaps the best way to end a paper on the future of coaching in organizations is to consult an oracle – specifically, an OD manager and early coaching champion at Oracle. “In my crystal ball,” says Oracle’s Christine Barnes, “I see the biggest growth coming in the areas of internal coaches and coaching skills training for managers. Organizations will have a cadre of internal coaches who take care of front-line managers and maybe directors. These would be ICF-certified coaches who coach as part of their jobs – maybe coaching two or three people at a time. At Oracle, we have eight part-time internal coaches now.” She hopes to have 100 in another five years. “Let’s face it,” she continues, “budgets aren’t going to suddenly start flowing with money for coaching. But as coaching becomes more credible, organizations will look for low-cost, effective ways to do it. That’s where internals come in. My dream is that anyone who wants a coach at Oracle can get one.”

As for external coaching, everyone interviewed for this report agreed that there will always be a role for externals to work with organizations as contract coaches, trainers, mentors, and coaching supervisors – especially those externals with internal coaching experience. “External coaches will definitely be part of the solution,” concurs Oracle’s Barnes. “I would hope and think that coaching in organizations will increase as our world becomes more specialized, and coaching is accepted as a results-driven activity. Over time, it will be extended as a development option throughout the organization. People will think of coaching as a privilege that they earn the right to receive. That’s the future I see.”

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Issue Ten: Personal and Organizational Coaching – Is There a Bridge?

During the 1970s, Paul Simon wrote a song about the "bridge over troubled waters." There are obviously many kinds of troubled waters in our world today—some swirling around in our personal lives and others swirling around in the organizations where we work. Some of us help our coaching clients address the personal turbulence, while others of us help clients address the turmoil operating in their organizations.

If the subject of coaching is water, what about the bridge itself?. Is the bridge the same for personal and organizational coaching, or does it come in several different forms? Is the design different for those doing personal and life work with their clients, from those working with executives and others working in an organizational setting? Even more importantly, we ask: is there a bridge that crosses between personal and organizational coaching—or are these two different worlds, between which there is a chasm that is not easily crossed?

We believe that there are important distinctions to be drawn between these two branches (or should we say Markets? Aspects? Labels?) of professional coaching and believe these distinctions are important to acknowledge when considering not only the preparation of professional coaches, but also the assessment (and credentialing) of men and women who are preparing for or currently engaged in professional coaching. However, we also believe that a sturdy (and passable) bridge exists between personal and organizational coaching—one that reflects not only the way in which most professional coaches actually work in the field, but also the way in which there is much for personal and organizational coaches to learn from one another via constructive dialogue. We offer articles in this issue of *The Future of Coaching* that identify the nature and size of the gap between personal and organizational coaching, as well as elements that provide a bridge between these two coaching perspectives and enterprises.

Three of the articles are contributed by authors who have already published in the Library of Professional Coaching. The first of these articles was written by two experts in the global outreach of professional coaching, Allen Moore and Jay Rybeck. They offer a panoramic view of coaching in organizational settings. While they build their analysis on interviews they conducted with global business leaders, their findings clearly identify both organizational and personal challenges being faced by these 21st Century leaders.

Coaching for the 21st Century

The second article, written by one of us [WB] centers on the career, as a key interface between personal and organizational coaching. This essay specifically focuses on the concept of career anchors (as originally introduced by Edgar Schein) and applies it to the different ways that entrepreneurship is displayed in contemporary organizational settings.

Coaching and Entrepreneurship

The third article reports on similarities and differences between personal and organizational coaching as represented in the responses of more than 200 coaches to two surveys on the Development of Coaching. Through analysis of results from these surveys, several important differences between personal and organizational coaching have been identified (as well as many similarities). This article is the seventh in a series of reports derived from these two surveys.

Development of Coaches: VII. Are There Any Differences Between Personal and Organizational Coaches?

We also offer three interesting articles from first-time contributors, all of whom write from the perspective of practicing coaches.

Rashmi Ripley writes as a coach about her experience with people inside and outside of organizations. Her article asks us to consider just how different—or not—are the problems and blocks that we face in our personal and professional lives.

The Executive and the Unexamined Life

Sandi Stewart, a coach training instructor and a member of the ICF's Independent Review Board, shares her perspectives on the similarities and differences between life and executive coaching as forms of practice—including several different categories of executive coaching. She explicitly calls out some of the complexities inherent in organizational work that the executive coach must face.

Differences in Personal and Executive Coaching

Mary Jo Ammon compares the structural differences between life and executive coaching engagements, describing the differences and similarities she sees in major stages of coaching engagements. She draws on her own experience in 20+ years of coaching to details substantive differences in contracting and process, among others—and comes to a conclusion about what holds both types of coaching together.

Coaching in the Real World: One Size Does NOT Fit All

We believe that these six articles provide important and diverse perspectives on personal and organizational coaching. They complete a three-issue series on personal coaching (issue eight) and organizational coaching (issue nine).

Coaching in the Real World: One Size Does NOT Fit All

By Mary Jo Ammon

In any coaching practice, it's safe to say that the clients we meet come to us in a multitude of ways. For some, they themselves recognize a clear (or unclear) and specific (or not so specific) need in themselves that they want to address. It may be that they are unhappy in their jobs and are seeking ways to be more fulfilled at work. It may be that they are looking to change course in their lives, taking on new challenges, and don't know where to begin. Or it may be that they are continuing on journeys of self-awareness and self-discovery, want to show up as their best selves, and are seeking another lens through which to see themselves.

Others may come to us through a formal program that their organization offers for developing leaders. Often these are people who have demonstrated competence, reliability and consistency in their current role, and are assessed to have the potential to take on a leadership role. Or maybe they are fortunate enough to be part of an organization that understands and values the long term and far reaching benefits of having a group of leaders who have the awareness, tools, and confidence to lead.

We also work with clients who are required to work with a coach as a condition of a performance improvement plan (PIP). In some cases, continued employment is predicated on their completing a series of sessions with a professional coach.

In Issue 8, Bill Carrier wrote: "But none of those important distinctions really address what we might argue is at the core of our work as coaches: the enhancement of individual lives." So in the most fundamental ways our work in all of these scenarios is to help our clients step into their own magnificence. While that fact remains, in this article we are going to explore the contracting constructs, rules of engagement and process, and outcomes of each type of engagement mentioned above.

Self-Sponsored Coaching Engagements

Contracting

Contracting for this type of engagement is the simplest. It usually takes the form of a one-page letter, which lays out what each of the parties will commit to in the relationship, including the coach's commitment to adhere to the International Coach Federation's Code of Professional Ethics. Terms are clearly defined, including how the engagement will be carried out (i.e., phone, Skype, in person), how many sessions are included, frequency of sessions, begin and end dates for the engagement, coaching rate, process for scheduling changes, and payment terms. As with all contracts, both coach and coachee agree to terms and sign the contract prior to beginning coaching.

Rules of engagement and process

This is the most flexible of all coaching engagements, as the coach and coachee are free to determine the terms of the coaching arrangement. There are no external reporting requirements, restrictions on where and how meetings can be held, or schedule restrictions driven by organizational/program requirements. The coach and coachee are free to adapt their arrangement in a manner that best suites the needs of the partnership.

Outcomes

We have said that the "enhancement of individual lives" is the core of our work as coaches. How is that measured, you may ask? The quick answer is: through self-reporting by the coachee. There are other ways that we can measure return on the coaching investment. For this type of coaching arrangement, one of the most common, and arguably most important, outcomes of coaching is increased self-awareness—awareness of strengths, preferences, predispositions and blind spots. Clarity about these things allows the coachee to make clear-eyed decisions about the strategies and practices that will be most effective in moving the coachee towards his[i] personal and professional goals. Specific outcomes of this type of coaching include: a decision to change to a career field that is a better fit for the coachee, successful advancement in a current job, and improved interpersonal relationships. All of these outcomes enhance personal wellbeing which yields innumerable benefits to the individual and the business, personal and societal systems in which they operate.

Organization Sponsored Coaching Engagements

Contracting

Contracting for this type of intervention is typically more involved than an individual coaching engagement. There are more stakeholders here, including the coachee's manager, development program sponsors, peers and colleagues of the coachee, the legal department, contracts and finance departments, and human resources. Each of these stakeholders will have their own requirements and expectations of the coaching arrangement which range from compliance with established standards and rules for an organization wide coaching program, to periodic progress reporting and check-ins with key stakeholders (which may include the coachee's manager and the contract administrator), to reporting against project budgets. Coaches can expect more administration of the coaching agreement necessitated by required reporting by the various stakeholders.

Rules of engagement and process

There is not a singular experience that defines coaching in an organizational context. In some cases, clients are part of a development program; in others, an astute manager may simply understand the benefits of providing coaching for her people. This is often the case when a manager has had the experience of being coached herself. In either case, what distinguishes this type of coaching from self-sponsored coaching is that there are typically several entities within the organization who have a vested interest in the process and outcome of the engagement in addition to the coachee. First and foremost, the coachee's management has an interest in their employee coming away with a greater awareness of who they are, where they are going, and what they need to do to get there. The manager needs to understand his role in helping his employee to succeed along the way. Also, whoever is footing the bill for the engagement, whether it be the manager or a component within Human Resources, has an interest in getting a return on their investment and making sure that expenditures are accounted for and are within budget. The legal or labor relations department may want to make sure that the arrangement is compliant with organizational contracts and agreements with employees. All of these influences can burden the coaching process; our job as coaches is to create a sanctum for the coaching sessions that keeps the space free of the externalities so that the coachee is free to do the work, and play, of the coaching dynamic in a protected space. It is important that other stakeholders understand and appreciate the importance of keeping the coaching space clear. Managers must also understand that these are confidential conversations, the content of which is the property of the coachee, and can only be shared by them.

Outcomes

Outcomes of this type of coaching include all of those mentioned for self-sponsored coaching, with a few notable additions. Organization sponsored coaching is often focused on a set of competencies that the organization is seeking to develop and/or reinforce. For some, coaching that is offered by the organization is the first time they have had a space to talk about where they themselves feel a need for some shoring up as they progress in the organization. Some of the fundamentals of leading are often discussed here, and coaches may offer specific tools and practices around leadership that become part of the coachee's offer to the organization. There is a potential for significant return on investment here; as the coachee practices and builds her leadership muscle, she becomes a model of leadership for those she comes into contact with. This produces a multiplier effect of the coaching, where the benefits extend well beyond the individual coachee.

Coaching for Improved Performance

Contracting

Contracting in this circumstance is often very specific and must be carefully navigated. A performance weakness has been identified, and the coaching is aimed toward understanding what may underlie the performance issue, then working with the coachee to develop strategies and practices to address gaps. There are always at least two important stakeholders to this coaching arrangement: the employee's manager and someone from Human Resources. Since this is often one of the last steps in the remediation process, it is important that the coach is provided access to information that supports the manager's decision to put the employee on a performance improvement plan (PIP). As a matter of fact, the coach in this case may stipulate that access to such information be provided as a condition of entering into a coaching contract. The aim is to not enter into coaching with a coachee who is a blank slate; that would not be appropriate here. The coach in this case would need to have the benefit of the contextual background, and to understand which diagnostic and/or development tools have already been used so that he can be effective quickly. As these are highly sensitive coaching arrangements, it is incumbent upon the coach to provide input and/or feedback to the sponsor on the specifics of the coaching contract, i.e., the duration of the intervention, the timing and nature of periodic check-ins with the manager, and the role of the manager in supporting the coachee as they engage in the practices developed with the coach.

Rules of engagement and process

In some cases, the coachee welcomes the coaching, as she sees it as an opportunity to move forward, either in her current organization or somewhere else. But this is not always the case. By the time the coach is brought in, the coachee has been evaluated, assessed, counseled and perhaps reprimanded. It is the coach's role here to provide a safe haven, a place where the coachee can look inward, process all of the feedback she has received (solicited or not!), and be self-determinant about her future. As with all coaching engagements, perhaps even more so here, creating a sense of safety is paramount. Willingness of the coachee to participate fully in the process must be assessed early on.

We have found that due to the level of investment the organization is making in the employee, there is often great curiosity from the myriad of stakeholders about the pace, nature, and sustainability of changes in the coachee's behavior. This is where it can get tricky. The time frame for seeing behavior changes is typically longer than a manager and other stakeholders are willing to wait, since presumably they have already invested in managing the employee's performance. It is the coach's responsibility to manage expectations around this; the behaviors that are not working did not develop over 120 (or insert other arbitrary time horizon here) days, and the organization should not expect changes in behavior to occur that quickly either.

Lastly, it is essential that the manager be part of the solution here. In this scenario, the coach should expect to spend some time coaching the *manager*, who sometimes is an unwitting accomplice to the behavior he would like to see the coachee change. Often, at least one conversation about the importance of setting clear expectations and holding the coachee accountable is warranted.

Outcomes

In addition to the outcomes already discussed, there are some unique outcomes of performance related coaching. Through coaching, the coachee may come to understand that the reason for the performance gap is that there is a disconnect between his skills and interests and what the organization is asking him to do. The coaching conversation would explore possibilities for addressing the disconnect, perhaps by finding a role that is a better fit within the organization, developing missing skills required by the current role, or exploring options outside of the organization that better utilize the coachee's gifts. The return on the investment in coaching would be a more contented, and therefore productive, employee; an opportunity to reduce the cost of remediation over the long term; and/or the ability to focus investment on developing employees who fit well with the organization mission and culture.

Conclusion

So, you see, there are nuances in how we as coaches serve our coaching clients and the organizations they are a part of, depending on how they present to us. The nuances are important for us to acknowledge and plan for so that there is a clear and sustained benefit to all parties. Finally, the aim of our coaching remains the same in any case, that is, to help our clients step in to their own magnificence.

Issue Eleven: The Coaching Tool Box

Some years ago, as one of us (BC) was concluding a coaching engagement with a client, the conversation turned, as it does, to how to carry the good work forward. What new habits and actions, what new questions or perspectives, had the client discovered or developed through coaching that client might want to keep using?

For some reason, the idea wasn't resonating, so I changed the question. "What tools do you want to keep on your tool belt? What do you want to have ready at hand because you use them constantly—like a carpenter uses hammer? What will you want to keep in your tool chest, where you'd put the more specialized tools you need to be able to find but don't necessarily need all the time?" This time, the conversation tracked.

As it happens, later, I enjoyed a good company and good meal at a conference for coaches, swapping anecdotes and answers with a group of five colleagues. We shared the best ideas we had been using or seen in use in coaching recently—the conversation pirouetted around advanced coaching courses, new perspectives, interesting questions to ask clients, what to do when stuck in a session. Like a group of carpenters proud of their tools and happy to share, we showed off some of the contents of our coaching tool chests, as we have invited others to do—and as we are inviting you to do!—in this issue of our magazine.

So, welcome to the 11th issue of The Future of Coaching! In the nearly three years we've been publishing this magazine, we've endeavored to add to the discourse of coaching—and to do so with joy. (We hope you have enjoyed it as well.) We've looked at research in coaching; we've remarked on supervision in coaching; we've explored coaching within professions, among other broad themes.

In this issue, in the collaborative spirit of coaching and the dinner we mentioned above, we intend to create a Coaching tool chest—a perennially open issue of coaching tools, approaches, perspectives, questions, etc. We are publishing the things you as coaches want to share with your peers. You might consider it a digital conversation of show-and-tell to contribute to people who, like you, are craftspeople of the soul. When you sit down for coffee or a meal with your coaching friends, what do you share about how you do your work?

In the spirit of this experiment, we intend to leave this issue open for submission—we'd like to invite you to submit (and submit again and again, if you'd like).

New Contributions

Right out of the gate, we have submissions from four coaches.

Vikki Brock, who writes about an integrative approach to head, heart and gut" in coaching--a holistic method based in neuroscience.

Head-Heart-Gut Approach to Coaching

David Spungin, a first-time contributor, offers his take on 360 interviews, based in the method promoted by Marshall Goldsmith.

Four Questions for an Artful Feedback Interview

One of us (BC) shares how to support clients with setting the stage for deeper learning and creating a strong basis for renewal conversations in "Client-Led Consolidation of Learning and Review of Return on Investment."

Client Led Consolidations of Learning and Review of Return on Investment

One of us (BB) also offers two brief tools for use by coaches. The first tool is a short compendium of questions for coaching—his interrogatives offer ways to clarify what your client wants, what your client has, what the gap between the current and the ideal state are, and what ideas might fill the gap.

Key Coaching Questions

The second tool is a framework for the exploration with a client of the "head winds" (resisting forces) and "tail winds" (facilitating forces) that are impacting on their life and work.

Coaching to the Head Winds and Tail Winds

Past Contributions

We also have included in this coaching tool chest some tools that are already in the Library of Professional Coaching (which is itself and abundantly supplied tool chest). Here are these coaching tools:

Emma Louise-Elsey has been one of our most active and generous contributors to the Library's tool chest. She shares three scripts and a few tips for guided meditation for your clients.

Guided Meditation: Scripts for Relaxation

10 Life Visionary Exercises and Ideas to Help Your Clients Get Inspired by Life!

How to Use the Wheel of Life Template to Create Meaningful Goals!

In "How to Create an Attitude of Gratitude," Dr. Maynard Brusman share research and tools to help with the mindset of appreciation.

How to Create an Attitude of Gratitude

Mary Anne Flanagan suggests five practical ideas—including asking "who is in your Fab 5?"—for your growth as a life or executive coach.

Who is in Your Fab 5?

Paulette Rao, MCC, asks "How Are You Using Your Power?" to remind us that our marketing messages are built on our internal dialogue.

How Are You Using Your Power?

In a short set of strategies and tactics, one of us (BB) suggests ways to get out of the rut of stress. See his "Managing the Stress: a Coaching Tool."

Managing the Stress

Book Shelf

Finally, we offer our recommendation regarding a book that contains many provocative coaching questions. This book, in and of itself, is an overflowing coaching tool chest!

The Book Shelf: and the next question is . . . ?

Client-Led Consolidation of Learning and Review of Return on Investment

Bill Carrier

"Bill, I want to renew our engagement because I find value in our work together. It's been good--I know we did a lot in the last year, but I just can't remember what we did."

Early in my coaching career, at the end of a year of coaching, a client who had some extraordinary transformations in confidence, career, and income, said almost exactly that to me. I was, frankly, momentarily stunned. The differences in this client's life were truly momentous and unmistakable—at least I had thought they were. I took a deep breath and offered a short overview of where I thought he was when he started and what I saw regarding some of the goals he set and achieved. "Wow!" he responded, "I felt like we did a lot—and we did a lot more than I remembered by far. I guess I'm doing even better than I thought I was."

Often, when we as coaches do our work well, even the clients we have who gain the most powerful outcomes are only partially aware of their accomplishments—unless we draw their attention to the changes they've made and the outcomes they've created. Their growth is so organic, so natural, that they don't realize how far they've traveled.

But this knowledge is important to the client. Experience suggests being clear about their accomplishments makes it easier for clients to continue them, for clients to have confidence in their new capabilities, and for clients to build future habits on top of new habits. More, when clients know what they've done, they can more easily see what needs to be done next—which is the basis of the conversation about renewing a coaching engagement.

To support clients in consolidating their learning, I suggest they write short answers to these questions:

- As a result of my coaching work, what new thoughts or ideas do I have?
- As a result of my coaching work, what new actions have I been taking?
- As a result of my coaching work, what outcomes have I created or contributed to?

Issue 12: Ethics in Action

What would the coaching profession look like if there were no trust between the coach and client and coach to coach? I suspect there wouldn't be much of an industry. All of us individually have an impact on the "trust factor" every day we practice coaching and interact with our colleagues. It is because of the thoughtful practice of coaching and the coaching organizations that have helped to build the industry that we have some common standards that, in turn, generate the trust that sustain a coaching marketplace that hires and deploys coaches.

As a member of the Independent Review Board of the International Coach Federation, one of us (our guest editor, Sandi Stewart) has reviewed numerous cases of breaches of the ethics code. More often than not, these breaches aren't due to mal-intent on the part of coaches, but rather to a lack of understanding of good coaching practices and poor communication with clients and other coaches.

This issue of *The Future of Coaching* is titled: "Ethics in Action." It focuses on some of the key things to know about ethics in coaching. It provides steps you can take to build a consciously ethical practice. Two categories of articles appear here (along with a third section that provides valuable coaching resources):

- How do we think about ethics as coaches?
- What are some of the tools that build ethics into our coaching practice?

As you read the articles of this issue, please take some time to reflect on your own practice – what ethical challenges do you face or might you face in the future?

Here's what's in this issue:

Section 1: How Do We Think About Ethics as Coaches?

In *Seeking Ethical Maturity Through Curiosity And Continuous Learning*, Kathy Taberner, an executive coach and author on curiosity, offers two principles for continued learning and growth as ethical professionals.

In *Case Studies and Good Questions to Ask Yourself*, Patrick Williams gives us some real life examples of ethical dilemmas and then some questions to ponder for us to stretch our ethical thinking muscles.

In *The Ten Commandments for Game Changers*, Thomas Zweifel brings the 10 Commandments to life in the modern age of coaching and shows us the ethical conversation that has been going on for ages.

In *It's Okay…Not Today…But I Support You Guys Anyway*, Jonathan Lewis Smith shares his personal challenges in opening people into the possibility of a different ethical mindset.

Section 2: What Are Some of the Tools that Build Ethics into Our Coaching Practice?

In *The Coaching Ethics Code and Coaching Review Process*, Sandi Stewart outlines the ethics review process at the International Coach Federation and provides insights into the thinking of the Independent Review Board and it's continuously improving process.

In *Agreements, Terms and Conditions and Why They Matter to You and Your Business!*, Janine Schindler's first contribution to our magazine makes the point that where you start (the contracting phase of an engagement) has a lot to do with where you end up (the outcomes) and how you get there (process and ethics).

In *When Ethics Could Collide: Nine Practices*, Kathy Taberner offers suggestions to maintain ethical action when different cultures create impact because of different values.

In *Ethics in a Historical View & A Framework for Ethical Decision Making*, Patrick Williams delves into the deep philosophical roots of ethics and then gives us a method for how to make ethical choices.

Section 3: Additional Resources for Engaging Reflection on Coaching Ethics

In *The Coaching Tool Box*, Sandi Stewart offers some resources and links for further reading on ethics in our industry.

In this issue's The Book Shelf, Kathy Taberner reviews *Values and Ethics in Coaching* by Lardanou, et al. Kathy recommends reading Lardanou's book for thoughtful approach to what ethics are and how they can be effectively applied in coaching.

Ethics in a Historical View & A Framework for Ethical Decision Making

By Patrick Williams

We can look back to the early theories of ethics from Socrates and later Kant and others having to do with general moral and ethical behaviours for humans. And then as business and professions began to evolve there was reference to ethic practice of trades, and of professional societies as they developed (accountants, lawyers, etc). Indeed, much of coaching today has borrowed from the concept of Socratic dialogue, but remember, he was sentenced to death by poison essentially for upsetting the community by teaching young persons to ask a lot of questions of themselves and their parents. You can imagine how that went over in early Greek society.

Nevertheless, we can look to Socrates as an early coach of sorts and later on Aristotle as well. Both men set the stage for all ethical guidelines that evolved in professions over centuries (See Ethical Maturity in the Helping Professions, Carroll and Shaw)

Five Sources of Ethical Standards

The Utilitarian Approach

Some ethicists emphasize that the ethical action is the one that provides the most good or does the least harm, or, to put it another way, produces the greatest balance of good over harm. The ethical corporate action, then, is the one that produces the greatest good and does the least harm for all who are affected-customers, employees, shareholders, the community, and the environment. Ethical warfare balances the good achieved in ending terrorism with the harm done to all parties through death, injuries, and destruction. The utilitarian approach deals with consequences; it tries both to increase the good done and to reduce the harm done.

The Rights Approach

Other philosophers and ethicists suggest that the ethical action is the one that best protects and respects the moral rights of those affected. This approach starts from the belief that humans have a dignity based on their human nature per se or on their ability to choose freely what they do with their lives. On the basis of such dignity, they have a right to be treated as ends and not merely as means to other ends. The list of moral rights -including the rights to make one's own choices about what kind of life to lead, to be told the truth, not to be injured, to a degree of privacy, and so on-is widely debated; some now argue that non-humans have rights, too. Also, it is often said that rights imply duties-in particular, the duty to respect others' rights.

The Fairness or Justice Approach

Aristotle and other Greek philosophers have contributed the idea that all equals should be treated equally. Today we use this idea to say that ethical actions treat all human beings equally-or if unequally, then fairly based on some standard that is defensible. We pay people more based on their harder work or the greater amount that they contribute to an organization, and say that is fair. But there is a debate over CEO salaries that are hundreds of times larger than the pay of others; many ask whether the huge disparity is based on a defensible standard or whether it is the result of an imbalance of power and hence is unfair.

The Common Good Approach

The Greek philosophers have also contributed the notion that life in community is a good in itself and our actions should contribute to that life. This approach suggests that the interlocking relationships of society are the basis of ethical reasoning and that respect and compassion for all others-especially the vulnerable-are requirements of such reasoning. This approach also calls attention to the common conditions that are important to the welfare of everyone. This may be a system of laws, effective police and fire departments, health care, a public educational system, or even public recreational areas.

The Virtue Approach

A very ancient approach to ethics is that ethical actions ought to be consistent with certain ideal virtues that provide for the full development of our humanity. These virtues are dispositions and habits that enable us to act according to the highest potential of our character and on behalf of values like truth and beauty. Honesty, courage, compassion, generosity, tolerance, love, fidelity, integrity, fairness, self-control, and prudence are all examples of virtues. Virtue ethics asks of any action, "What kind of person will I become if I do this?" or "Is this action consistent with my acting at my best?"

Putting the Approaches Together

Each of the approaches helps us determine what standards of behavior can be considered ethical. There are still problems to be solved, however.

The first problem is that we may not agree on the content of some of these specific approaches. We may not all agree to the same set of human and civil rights.

We may not agree on what constitutes the common good. We may not even agree on what is a good and what is a harm.

The second problem is that the different approaches may not all answer the question "What is ethical?" in the same way. Nonetheless, each approach gives us important information with which to determine what is ethical in a particular circumstance. And much more often than not, the different approaches do lead to similar answers.

Making Decisions

Making good ethical decisions requires a trained sensitivity to ethical issues and a practiced method for exploring the ethical aspects of a decision and weighing the considerations that should impact our choice of a course of action. Having a method for ethical decision making is absolutely essential. When practiced regularly, the method becomes so familiar that we work through it automatically without consulting the specific steps.

The more novel and difficult the ethical choice we face, the more we need to rely on discussion and dialogue with others about the dilemma. Only by careful exploration of the problem, aided by the insights and different perspectives of others, can we make good ethical choices in such situations.

We have found the following framework for ethical decision making a useful method for exploring ethical dilemmas and identifying ethical courses of action.

A Framework for Ethical Decision Making

Recognize an Ethical Issue

1. Could this decision or situation be damaging to someone or to some group? Does this decision involve a choice between a good and bad alternative, or perhaps between two "goods" or between two "bads"?
2. Is this issue about more than what is legal or what is most efficient? If so, how?

Get the Facts

3. What are the relevant facts of the case? What facts are not known? Can I learn more about the situation? Do I know enough to make a decision?

4. What individuals and groups have an important stake in the outcome? Are some concerns more important? Why?
5. What are the options for acting? Have all the relevant persons and groups been consulted? Have I identified creative options?

Evaluate Alternative Actions

6. Evaluate the options by asking the following questions:

- Which option will produce the most good and do the least harm? (The Utilitarian Approach)
- Which option best respects the rights of all who have a stake? (The Rights Approach)
- Which option treats people equally or proportionately? (The Justice Approach)
- Which option best serves the community as a whole, not just some members? (The Common Good Approach)
- Which option leads me to act as the sort of person I want to be? (The Virtue Approach)

Make a Decision and Test It

7. Considering all these approaches, which option best addresses the situation?
8. If I told someone I respect-or told a television audience-which option I have chosen, what would they say?

Act and Reflect on the Outcome

9. How can my decision be implemented with the greatest care and attention to the concerns of all stakeholders?
10. How did my decision turn out and what have I learned from this specific situation?

This framework for thinking ethically is the product of dialogue and debate at the Markkula Center for Applied Ethics at Santa Clara University. Primary contributors include Manuel Velasquez, Dennis Moberg, Michael J. Meyer, Thomas Shanks, Margaret

R. McLean, David DeCosse, Claire André, and Kirk O. Hanson. It was last revised in May 2009.

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[i] Rather than use "his or her" throughout this article, I will alternate usage of the male and female pronouns.

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**Sandra Johnson:** Human Relations Life Coach/Consultant - Ms. Johnson enjoys helping people. Born in Chicago and raised in Jacksonville, FL, she has learned how to adapt to different situations. As a teenager, she decided that her purpose would be to help young people rise above tough circumstances and disappointments in order to live and succeed in a productive life. That purpose escorted her through 15 years of work and service with at-risk youth and their families and another six years of staff development, team motivation, evidence-based curricula training, and program accountability in state government Juvenile Justice. Ms. Johnson is an advocate for education, which is evidenced by a MA in Theological Studies and a MA in Human Services Counseling with a focus on Executive Leadership. In addition, she is presently working on a MA in Mental Health Counseling to become a licensed mental health professional. For recreation, her highlight is to watch her favorite sports teams dominate on the field and the courts. Ms. Johnson is the founder of The MADISEL Group, LLC. The MADISEL Group provides coaching, consulting, and motivational training for relational wellness at home and the workplace. www.themadiselgroup.com
Gladys Kartin: With over 20 years transforming career confusion, interviewing jitters, and next step planning aspirations into broad, confident smiles, my clients gain clarity, focus, and direction to implement with ease. I help my clients understand who they are, encourage rule breaking, and give a voice to their boldest aspirations. I use smart, user-friendly resources, tools, and assessments for self-awareness, clearing away erroneous assumptions and subjective beliefs. We will have intelligent conversations to get you where you need to go.
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Authors

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Mary Jo Ammon, President of Ammon Consulting LLC, specializes in working with leaders and their teams to optimize their own and their team's performance. Mary Jo started her career helping leaders in Johnson & Johnson operating companies around the world adhere to a corporate set of internal control guidelines and procedures. This experience clarified Mary Jo's calling to work with leaders in their quest to lead with integrity, nurture employees, and delight customers, all while navigating the myriad requirements levied by a host of stakeholders. Between 1985 and 2004 Mary Jo worked for a single employer under three different letterheads as a result of mergers and acquisitions: Coopers & Lybrand LLP, PricewaterhouseCoopers LLP, and IBM. After three years in a leadership position at Grant Thornton LLP, Mary Jo struck out on her own in 2007 so that she could do more of what she loves, advising and coaching leaders. Mary Jo is a certified coach, and has completed advanced coach training through Newfield Network and George Mason University.

John Bush

John Bush and his wife Valarie live in Grass Valley, California. John has enjoyed a diverse life journey. He has been a banker, financial officer, small business owner, ordained minister, addictions counselor and psychotherapist, and nonprofit leader. John earned an MBA from UCLA, a M. Div from Fuller Theological Seminary, completed coach training from The Coaches Training Institute and earned a Psy. D. from The Professional School of Psychology.

Bill Carrier

Bill Carrier, President of Carrier Leadership Coaching Inc., leads an organization which specializes in coaching senior and high-potential executives in leadership and personal development. A graduate of the United States Military Academy at West Point, former Army officer, and Rotary International Ambassadorial Scholar, Bill grounds his coaching work in extensive practical leadership experience and the firm belief that we are all part of something bigger than our individual selves.

With more than a decade of business development and sales team leadership, Bill has extensive experience with senior-most HR executives of billion-dollar companies across the US, Australia, and South Africa to leverage leadership assessment and human capital measurement to improve company culture and performance.

Margaret Cary

Margaret Cary is President and CEO of The Cary Group, an executive coaching, training and public speaking firm. Maggi is a doctor's doctor with a physician's mind and a friend's heart. As an executive coach she blends a scientist's thinking with empathy. Her clients include physicians and researchers in academic medicine, private industry, medical centers, professional associations and research organizations – senior leaders, those new to management roles and those in transition.

Dr. Cary designed, developed and delivered the national Physician Leadership Development Program for the US Department of Veterans Affairs, grooming mid-career physicians for leadership roles in the $180 billion organization. She is a recognized thought leader on executive coaching, adult learning and coaching medical students and physicians, and has distinguished herself as a professor, author and senior executive. She is a Leadership and Executive Coach, graduating from Georgetown University's course in 2009. She holds a Professional Certified Coach (PCC) credential from the International Coach Federation, where she is also a certified Mentor Coach.

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Emma-Louise Elsey has been coaching since 2003 and is the founder of The Coaching Tools Company.com, and the soon to be launched FierceKindness.com. Originally a project and relationship manager for Fortune 500 companies, she loves to write and create coaching tools and resources. The Coaching Tools Company.com is an ICF Business Solutions Partner and proud supporter of The Library of Professional Coaching. With over 100 coaching exercises and activities, plus toolkits and over 25 free coaching tools, The Coaching Tools Company is your go-to resource for in session, homework, group coaching and workshop exercises.

Vicki Foley

Vicki Foley, Senior Vice President, Global Leadership Development Practice Leader for Lee Hecht Harrison, provides inspiring leadership on multiple dimensions – senior client leadership, thought leadership, and collaborative leadership within the leadership development practice, the industry verticals, and throughout the organization. Vicki is passionate about providing Lee Hecht Harrison clients with winning strategies to develop their talent. As the firm-wide expert, Vicki has designed and delivered leadership development and executive coaching solutions at the enterprise level for a wide range of industries. Vicki has presented on the subjects of leadership theories, trends, engagement metrics and organization change models to senior level audiences at industry conferences, company meetings and universities. Vicki recently completed a year-long assignment based in Paris, France, where she is partnered with European organizations to accelerate business performance with talent strategies that transform leaders at all levels. Vicki holds an M.A. in Organizational Psychology and B.S. in Business Administration.

Carol Goldsmith

Carol Goldsmith is a certified coach, coach trainer, and thought leader with more than 15 years' experience coaching leaders on four continents. She is a former director of PwC's Leadership Coaching Center of Excellence. Carol served as 2014 president of ICF Metro D.C., the world's largest ICF city chapter, and chair of its Prism Awards honoring excellence in organizational coaching. She is a member of the ICF Internal Coaching CoP and four-time chair of the Capital Coaches Conference, where she moderated a 2015 panel on The Future of Coaching in Organizations. A certified NLP trainer, ICF mentor coach, and Action Learning coach, she lives near Washington, D.C.

Gail Johnson Vaughan

Gail Johnson Vaughan, MA, has been a child welfare advocacy professional for more than three achieving breakthrough impacts to increase placement stability and improve permanency outcomes for children in foster care. Her work has changed the conversation about children waiting in foster care from lack of awareness to a sense of urgency followed up with action by counties throughout California, resulting in the adoption of tens of thousands of foster children.

The effectiveness of her permanency practice and advocacy expertise been recognized with numerous awards including US DHHS Adoption Excellence Award, Congressional Angel in Adoption Award, Purpose Prize Fellow, California's "Change a Lifetime Award, Sacramento Business Journal "Women Who Mean Business", NACAC Adoption Advocate, and more.

Lory Lanese

Lory is an International Coaching Federation Professional Certified Coach with over 10 years of individual, team and organizational leadership-executive coaching experience. She has worked in corporations for 35 years. She spent most of her career in a high-tech Fortune 100 company. For much of that career Lory led local and international learning organizations. A passion was coaching and developing her employees, motivating her decision to become a certified coach. For her last 5 years at a high-tech company before retiring, she was dedicated to executive leadership coaching, cultural change and organizational effectiveness. She is currently the Director of Human Performance, Culture and Coaching at a dental and braces organization that serves the underserved. Lory applies her coaching, leadership, learning and behavioral science background to support her clients' goals and future vision.

John Lazar

John B. Lazar, MA, MCC, is an executive and leadership coach and consultant with expertise in clinical psychology, ontological practice, and human performance technology. He works with individual leaders and their teams to develop emotionally intelligent leadership, create an aligned environment for breakthrough execution, and deliver superior business results. In addition to his business coaching, he consults to companies on issues of leadership and management practices, communications, evaluation, executive team alignment, culture-strategy fit, and performance improvement.

He was a founding member and past President of the Board of Directors of the International Consortium for Coaching in Organizations (ICCO). He is a current Director on the Board of the Association for Redevelopment Initiatives. He is co-founder, owner, and Executive Editor of IJCO The International Journal of Coaching in Organizations®.

Anne Miller

Anne is distinguished by her action-oriented approach and for over 35 years she has worked globally with individual leaders and teams committed to going beyond past successes to create extraordinary futures for themselves and their organizations. She specializes in *leadership development, action learning, rapid cycle time innovation and executive alignment.*

Anne created the *Action Lab*™ as a tool for C-level executives to accelerate the delivery of breakthrough results while developing their leaders and their collaboration practices through a series of iterative accomplishments. Anne has led successful leadership development and organizational transformation efforts for Fortune 100 companies in many areas of the world. Anne is co-author, with Richard Pascale, of "Acting Your Way Into a New Way of Thinking" in *Leader to Leader*, and "Action Lab: Greenhouse for Change" in *Strategy and Business.*

Lloyd Raines

Lloyd is a seasoned executive coach (Master Certified Coach, International Coach Federation), consultant, educator, and Principal of Integral Focus, with over 25 years of professional experience. He applies insights from the behavioral sciences, action learning, moral considerations, and integral development to help clients expand their individual and organizational awareness, capability, and performance within a global context. He supports leadership growth in self-awareness, attentiveness, and impact through dialogue, experiential learning, and collaboratively-designed practices that explore the breadth and depth of stewardship responsibilities.

Lloyd's clients include executives and teams in the private and public sectors. Private sector clients include E*Trade Bank, AOL, Acterna, Booz/Allen/Hamilton, comScore Networks, Conair, EDS, Hewlett-Packard, MCI, Marriott International, and US Airways. He has also worked with a variety of public sector organizations, including AARP, International Food Policy Research Institute, American Public Health Association, AmeriCorps, Commerce Department, Department of Agriculture, Department of Education, Department of Health and Human Services, Department of the Interior, Federal Judicial Center, Fish & Wildlife Service, and the National Peace Corps Association.

Paulette Rao

Paulette Rao is an executive coach, trainer, speaker, author, and marketing expert. As principal of True North Resources, Paulette helps leaders enhance their performance and the performance of their team while achieving organizational objectives.

Paulette's leadership coaching is informed by her 28 years of experience as a senior executive and sales/marketing leader in corporate America. As a managing director for

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Marcia Reynolds

Dr. Marcia Reynolds, president of Covisioning LLC, is fascinated by the brain, especially what triggers feelings of connection, commitment, and possibility. She draws on her research as she helps leaders have more effective and meaningful conversations through both executive coaching and her training programs, which she has delivered in 36 countries.

Dr. Reynolds is a pioneer in the coaching profession. She was the 5th global president of the International Coach Federation and has returned to the board as a Global Director this year. She is also a past president of the Association for Coach Training Organizations, the training director for the Healthcare Coaching Institute at Virginia Tech, and on faculty for the International Coach Academy in Russia and Create China Coaching in China.

Interviews and excerpts from Marcia's books *Outsmart Your Brain, Wander Woman,* and *The Discomfort Zone: How Leaders Turn Difficult Conversations into Breakthroughs* have appeared in many places including *Fast Company, Psychology Today,* and *The Wall Street Journal* and she has appeared on *ABC World News*

Jonathan Sibley

Jonathan Sibley coaches business leaders, executives, and management teams to greater effectiveness in English, French, Spanish, Portuguese, and German. Jonathan helps his clients to better understand how their performance compares to the expectations of their key constituencies, to identify and overcome important blind-spots and obstacles to greater effectiveness, to enhance and build on their strengths while finding strategies to compensate for and improve upon weaker areas, and to improve key business relationships through more effective communication. Jonathan holds an MBA from INSEAD in Fontainebleau, France, an MSW from Columbia University, and a BA from Princeton University.

David Skibbins

David Skibbins works as a life coach with entrepreneurs, business owners, other coaches and upper level managers. A supervisor and virtual course teacher at Coaches Training Institute, he is certified by the ICF as a PCC. He has a Ph.D. in Psychology with a minor in Organizational Development from the Professional School of Psychology and was a psychotherapist for over twenty years. He wrote *Becoming a Life*

Coach : A Complete Workbook for Therapists, Working Clean and Sober, and co-wrote *The Stake: The Making of Leaders* with Henry Kimsey-House, as well as four murder mysteries published by St. Martin's Press.

Lew Stern

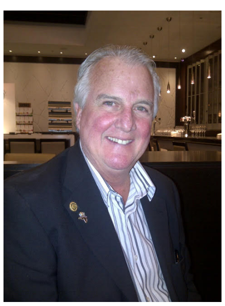
Dr. Lew Stern has over 35 years of experience as a leader, management consultant, executive coach, organization and leadership development specialist, and consulting psychologist. He focuses on helping boards, leaders and their teams develop skills and strategies and change their organizations and how they run them. He has worked with hundreds of leaders and would-be leaders to improve their leadership and accomplish their business and mission objectives on a very practical level.

Dr. Stern serves as Senior Advisor to the Institute of Coaching at McLean Hospital, Harvard Medical School and has a faculty appointment as Clinical Instructor at Harvard Medical School. He is a Co-Founder and Past President of the New England Society for Applied Psychology, and Co-Founder and Co-Leader of The Executive Coaching Forum. He was a Founding Board member of the Graduate School Alliance for Executive Coaching and founded and served as the Director of New England's only Graduate Certificate Program in Executive Coaching (at the Massachusetts School of Professional Psychology). Lew served as Director of the Annual Boston Conference on Executive Coaching for five years. He is a member of the International Advisory Board of the International Coaching Psychology Review and on the Editorial Board of Coaching: An International Journal of Theory, Research and Practice

Michael Stratford

Michael is a champion of uniqueness and specializes in unorthodox thought leadership. When presenting it's been said he's a blend of wise elder and wickedly irreverent comedian. And that doesn't include the business savvy, range and depth of experience garnered from 56 different jobs, and the mastery born of 2 decades of coaching clients from rock bands to Fortune 100 company execs and their teams.

In field of Executive Coaching, he has earned a reputation for helping others achieve a level of excellence in communication, leadership, and team performance. Michael's business client list is an exercise in diversification. It includes Finance, IT, Energy, Manufacturing, Pharmaceuticals, Social Media, the Online Gaming World and even other consulting/coaching providers. Michael has been an ICF MCC since 1999.



Patrick Williams

One of the early pioneers of coaching, Pat is often called the ambassador of life coaching. Pat began executive coaching in 1990 with Hewlett Packard, IBM, Kodak and other companies along the front range of Colorado.

He then started a coach training school, the Institute for Life Coach Training (ILCT), which specializes in training those with a human services orientation. He has authored 6 books about professional coaching with W.W. Norton books.

Pat is a past board member of the International Coach Federation (ICF). He is past president of ACTO, the Association of Coach Training Organizations and an honorary VP of the Association of Coaching Psychology and a Founding member of Harvard University's Institute of Coaching. Pat was awarded the first Global Visionary Fellowship by the Foundation of Coaching for his Coaching the Global Village initiative to bring coaching methodologies to villages in developing countries and to leaders of non profits and nongovernmental organizations who serve them.