

The British Psychological Society
Special Group in Coaching Psychology



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International Coaching Psychology Review



Volume 4 No. 1 March 2009



Coaching and Leadership



The Special Group in Coaching Psychology Events Team



The
British
Psychological
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Editorial

Leadership coaching in a challenging world – Growing with our clients

Michael Cavanagh & Stephen Palmer

WELCOME to this issue of the *International Coaching Psychology Review (ICPR)*. It is the first issue for 2009 and for our fourth volume. As has been our practice, this is a special edition with the topic of Coaching and Leadership. Travis Kemp has brought together an excellent series of papers from authors of note around the world. Together they represent one of the strongest collections of papers on leadership coaching available in the literature. Indeed, this issue of the *ICPR* on coaching and leadership looks to be a red letter issue.

As Travis mentions in his guest editorial, this is indeed a timely topic. We are moving into a world where many of our past assumptions and expectations about the world seem to be more and more uncertain. Travis has mentioned the Global Financial Crisis (GFC). Pundits tell us we are moving from the GFC through a global economic crisis toward another GEC – a Global Employment Crisis. Change is not limited to markets. Around the world we are told there is an increasing incidence of extreme weather events. Here in Australia we have just experienced the effect of such an extreme set of weather conditions as they fanned the worst bushfires in the history of European settlement.

These are times when it is easy to respond fearfully, and to retreat to past orthodoxies. However, it is also in such times that innovative and courageous leadership is needed. This is true of leadership at all levels, and in all its forms, including coaching. Coaching and coaching psychology are ideally placed to assist leaders in developing new, creative responses to the challenges of the present

and the future, but only if we can stand beside our clients as they struggle to develop larger, more encompassing perspectives on the systems in which they find themselves. This means that we too must enter the fray, and do the hard work of expanding our understandings, perspectives and skills. A world which calls for more flexible, responsive and sophisticated leaders, also calls for more flexible, responsive and sophisticated coaches.

Thankfully we are being well served in this task of continued development. The range of coaching psychology and coaching conferences, symposia and other gatherings continues to grow. In the UK, the British Psychological Society's Special Group in Coaching Psychology (SGCP) two-day conference in December was again a great success. The SGCP decided that this particular conference would be the 1st European Coaching Psychology Conference. It was an exciting event with speakers and delegates attending from all over Europe. Roundtable discussions included the state of coaching psychology in Europe and how coaching psychology can be further developed in the region. There was so much support for the conference, it was decided that the SGCP would sponsor the 2nd European Coaching Psychology Conference to be held in December, 2009. In Australia, the IGCP symposium was the best yet, with international and local speakers presenting a range of topics. One has only to conduct a search on the web to see the ever-burgeoning number of conferences and publications servicing the fields of both coaching and coaching psychology.

Given this growing number of publications, the *ICPR* will be moving from three smaller issues per year to two larger issues. The logistics of publication make publication in this format more cost effective and we hope, more rewarding for the reader. In the UK, SGCP members receive a hardcopy version of the *ICPR* and this change will reduce printing and postage costs. There is another change in this issue; to keep our members up-to-date with IGCP and SGCP activities, we now include a much needed News Section.

Once again, we commend this excellent edition to you, and would like to register our thanks to Dr Travis Kemp who has done such an excellent job as special editor for this issue. Happy reading!

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Guest Editorial

Coaching and Leadership: Practice, perspectives and directions from the field

Travis J. Kemp

IT IS WITH a great sense of privilege and excitement that I welcome you to the 2009 special issue of the *International Coaching Psychology Review* exploring Leadership and Coaching. Whilst at the time this topic was tabled, Leadership Coaching was of growing interest to many practicing coaching psychologists, but with the continuing deterioration of the global economic environment and associated collapses of several of the world's largest corporate enterprises, the quality of governance within our global enterprises has been called into question, as has the behaviour and ethical foundations of their leaders. As a result, this edition has taken on new meaning and importance for the future. Indeed, in the same way that positive applied psychology has provided new hope and direction for the profession of psychology and for our clients seeking to build flourishing lives, so too does leadership coaching offer hope for the creation of new, sustainable, socially responsible and nurturing corporate enterprises for the future.

For many coaching psychologists working within organisational and business contexts, their work almost inevitably draws them towards leadership within the organisation. This special issue has provided an opportunity to bring together a group of world leading theorists, practitioners and researchers to present their latest thinking and practice in the field of coaching and leadership.

The notion of conceptual overlap between Leadership and Coaching is by no means new and authors such as Burdett (1998) recognised the many theoretical and

practical links between the two fields of practice early in the literature. Indeed, as this current issue further illustrates, theoretical convergence between the practices of coaching and leadership is continuing at a rapid pace. In addition, a movement within the field of leadership development towards a deeper introspective process of self understanding continues to gain momentum and acceptance as a valid and effective form of leadership development.

The style and 'feel' of this special issue deviates slightly from the normal *ICPR* style. The field of leadership coaching is diverse in both its proponents and its practice and as the editor of this special issue, I have endeavoured to capture, as best I can, this diversity of thought, practice and perspective to capture the space between the two very broad fields of leadership and coaching. In attempting this I have sought to honour and maintain the authors' styles and preferences and to capture not only the latest thinking from within the field but also to anchor a point in time in the development of our understanding of leadership coaching as the broader body of knowledge within the field of coaching psychology accelerates at a rapid pace.

The issue opens with a Personality focus on leadership coaching. Eric Nelson and Robert Hogan present a synthesis of the extensive work on functional and dysfunctional personality and leadership effectiveness that Rob and his colleagues at Hogan Assessment Systems are continuing to conduct at a prolific rate. Still a vigorous issue of debate within the leadership and psychological literature alike, leadership personality provides fertile ground for explo-

ration. Specifically, Eric and Rob illuminate the dysfunctional behavioural patterns or 'Dark Side' of leadership personality. Specifically, the paper provides coaching psychologists with valuable insights into leadership derailment patterns and provides recommendations on how coaching psychologists can best support their clients to avoid these adverse leadership scenarios.

Marshall Goldsmith then shares with us his personal insights and thoughts on the 'coal face' application and phenomenon of the leadership coaching relationship. Marshall's open, frank and honest sharing as a thought and opinion leader within the field of executive and leadership coaching provides this special issue with a valuable window into the phenomenon of the leadership coaching conversation. Marshall's broader contribution to the field has been recognised and acknowledged globally and his thought leaders opinion piece raises several valuable points that will ground our practice as coaching psychologists.

Lindsay Oades' stimulating paper grapples with the application of coaching and positive psychology approaches to the significant challenges within mental health systems. This paper is unique in that it provides us with a demonstration of leadership coaching in action. Lindsay demonstrates how coaching psychologists are leading thinking, practice and reform within the mental health sector by living and breathing the positive, strengths based methods that they use with their clinical clients. This case study provides a meta-perspective on the application of leadership coaching methods within traditional clinical contexts within the public health system and stretches our perceptions of what is possible.

Continuing in the strengths coaching theme, Alex Linley, Linda Woolston and Robert Biswas-Diener provide practitioners with a valuable framework and method for making weaknesses irrelevant; an innovative and powerful adjunct to strengths based methods with leaders. The authors also grapple with the often problematic chal-

lenges leaders face when overplaying their strengths

David Drake's paper examines the application of attachment theory to narrative coaching models and provides us with valuable insights into the application of both psychodynamic and narrative methods to leadership coaching. David is widely recognised for his work with narrative techniques and his current paper provides an excellent illumination of the phenomenology of narrative providing the reader with excellent examples of psychodynamically informed narrative in action with leaders .

The challenge of developing coaching capability within leaders themselves is explored by Annie McKee, Felice Tilin and Delores Mason. Annie has co-published extensively with Richard Boyatzis and Daniel Goleman in thought leading realms of emotionally intelligent leadership and resonant leadership. This paper provides us with a privileged insight into a coaching capability development based leadership programme conducted within a major international bank. The case study provides us with insights into the commercial realities and limitations of using external leadership coaches within large organisations and the opportunity that is provided from developing managers' as in-house coaches.

From the United States we travel then to France for Elizabeth Florents illuminating paper. Here we are taken 'behind the scenes' of the Identity Lab experience at INSEAD. Elizabeth's paper explores the application of Psychodynamic approaches and philosophies to leadership development. Pioneered by Kets de Vries (2006), this psychodynamic approach is illuminated in Elizabeth's paper which both bridges the gap between therapy and coaching and provides us with valuable insight into a field of applied coaching that remains contentious.

The third of the programme-based papers is presented by Barbara Wood and Sandy Gordon. They share with us a unique coaching skills development programme embedded in the MBA curriculum at the

University of Western Australia. This paper provides us with valuable insights and developmental data over a two-year period which demonstrated clear support for the positive leadership impact of developing positive coaching skills within my leadership skills repertoire.

In the final chapter, I propose a future direction for research in leadership and coaching. Whilst many authors and practitioners alike recognise the similarities between coaching and leadership behaviours, few have investigated the phenomenon and impact of the unique *relationship* that is created between both coaches and leaders and their people. The coaching and leadership alliance accounts for a significant component of variability within coaching engagements and some argue it is the central mediating variable in achieving successful coaching and leadership outcomes. The final paper provides a theoretical framework that acts as a guide to developing and growing the leadership/coaching alliance and calls for greater investigative focus on this phenomenon in the peer-reviewed literature.

Together, this issue has captured a stimulating group of papers that I trust will stimulate thought, enthusiasm and host of new questions that will give rise to deeper and broader thinking and practice in the field of leadership coaching. In closing, I would like to personally thank the contributors to this edition and the significant efforts that they have made in making this special issue a reality. I would also like to personally thank Stephen Palmer and Martin Reeves (The British Psychological Society) for their outstanding support throughout this process.

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Coaching on the Dark Side

Eric Nelson & Robert Hogan

Dysfunctional personality characteristics can derail the career of an otherwise competent executive. Personality predicts both leadership effectiveness and derailment, and assessment of these characteristics is critical for effective coaching and leader development. This paper reviews the relationship between personality and leadership and offers a taxonomy of flawed interpersonal strategies that can degrade a leader's capacity to build and maintain high-performing teams. Assessment of these dysfunctional dispositions facilitates the coach's ability to build an effective coaching relationship, enhance the executive's strategic self-awareness, and identify appropriate targets and strategies for intervention.

Keywords: Executive coaching, leaders, leadership, personality, derailleurs, dark side.

ORGANIZATIONS AND INDIVIDUALS seek executive coaching to enhance the effectiveness of leaders and, by extension, to improve the performance of organizations. Depending upon their own theoretical orientation and the context in which coaching takes place, practitioners can offer interventions ranging from strengths-based to solution-focused to narrative to developmental coaching (see Cavanagh, Grant & Kemp, 2005; Peltier, 2001; Stober & Grant, 2006; for excellent summaries of the range of strategies available to executive coaches). Coaching is a relatively young field. As a result, some suggest that the rationale for executive coaching is poorly specified and that coaching lacks a cohesive conceptual foundation and firm research base to guide practice (Barner & Higgins, 2007; Berman & Bradt, 2006; Feldman & Lankau, 2005; Kilburg, 1996; MacKie, 2007; Passmore, 2007; Passmore & Gibbes, 2007). Still, Grant (2005) documents the exponential increase in scholarly papers devoted to executive coaching in recent years. The outcome data collected to date reveal that coaching generally does help executives become more effective leaders (Dagley, 2006; Kampa-Kokesch & Anderson, 2001) and can offer a substantial return on an organization's investment in the coaching effort (McGovern et al., 2001).

All coaches assess those with whom they work. At times, assessment is primarily

impressionistic, based on interviews with the executive and others in his or her work environment (peers, superiors, etc.). Filtered through the coach's expertise, and adapted to the context in which coaching occurs, these impressions form the basis for the coaching relationship and its goals. Structured assessment (e.g. through personality testing, 360-degree feedback, etc.) offers a more systematic strategy for identifying a leader's strengths and developmental opportunities (cf. Cronbach, 1960). Standardized measures are becoming more widely used in coaching (Alworth & Griffin, 2005; Passmore, 2008), and we believe that psychometrically sound, well validated measures can enhance and accelerate the coaching process.

Assessment in executive coaching is not merely an intellectual exercise; rather, valid assessment will provide the coach useful information on which an intervention can be based. Personality characteristics predict leadership effectiveness and, by extension, organizational outcomes. In this paper we review briefly the literature linking personality to occupational performance, focusing on characteristics that can degrade executive effectiveness – the 'dark side' of personality (R. Hogan & Hogan, 2001). These are dysfunctional interpersonal and self-regulatory patterns that interfere with the leader's capacity to build and maintain high-performing teams. Awareness of these 'dark

side' tendencies, and the underlying 'mental models' with which they are associated, allows the coach to design interventions that will mitigate their impact on leadership and, indeed, on the coaching relationship itself.

Personality and Leadership

Competent leaders build and maintain effective teams that compete successfully with others (R. Hogan, Curphy & Hogan, 1994). Research indicates that effective leaders understand their subordinates' needs, abilities, and aspirations, and can persuade them to share the leader's vision for the organization as a whole. This is, of course, the essence of the 'transformational' leadership style (Avolio & Bass, 1995; Avolio et al., 1996; Bass, 1985) that complements the equally important focus on 'taking charge,' communicating clear expectations, and maintaining accountability. Indeed, the capacity to move seamlessly between 'enabling' and 'forceful' styles – without overdoing either – appears to be critical for effective leadership (Kaplan & Kaiser, 2006). Coaching and leadership development help executives remain versatile in their leadership style, and resolve flawed interpersonal strategies that impede their ability to motivate subordinates effectively.

Poor leadership is not simply an absence of technical, cognitive, and strategic skills. Rather, dysfunctional dispositions (and the flawed interpersonal strategies associated with them) can degrade whatever skills and competencies a leader might otherwise possess. At their worst, such leaders may be experienced as 'destructive' (e.g. Einarsen, Aasland & Skotgstad, 2007; Tepper, 2000; Tierney & Tepper, 2007) or even 'toxic' (Frost, 2004; Padilla, Hogan & Kaiser, 2007) by their subordinates and the organization as a whole. Managerial incompetence creates great misery for those associated with the dysfunctional leader (R. Hogan & Kaiser, 2005). Thus, recognizing and modifying the destructive interpersonal strategies of leaders will improve the competitive advantage of the team and the satisfaction and well-being of the executive's subordinates.

Bad management exists at all levels of most organizations. Hogan (2007) estimates that the base rate for bad managers may range from 65 per cent to 75 per cent, and one recent survey of managers and executives suggests that as many as 27 per cent of their subordinates who have been rated as high potential are at risk for 'derailment' (i.e. being either demoted or fired) for performing below the level expected of them. Such findings are consistent with the results of earlier reviews (e.g. Bentz, 1985; Dotlich & Cairo, 2003, Leslie & VanVelsor, 1996; McCall & Lombardo, 1983) which identified insensitivity, abrasiveness, micro-management, and other dysfunctional interpersonal behaviours as the primary causes of managerial failure. Bad leadership is both common and highly consequential for the productivity of organizations, and the resolution of flawed interpersonal strategies is another important goal of executive coaching and leadership development.

An executive may seek out or be referred for coaching for many reasons (Giglio, Diamante & Urban, 1998; Stern, 2004). In some cases, superiors may identify an executive as being at risk for derailment; in these cases the organization may provide the opportunity for coaching. In other cases, an organization may create a programme for all of their senior leaders, 'high potential' middle managers, or others to enhance their personal development as leaders. In either instance, knowledge of potential dysfunctional interpersonal patterns is critical for coaching success. In the case of the 'derailing executive,' the flawed interpersonal style may itself be the reason for referral. For those referred for assistance in enhancing existing skills (in order to help the high potential manager move more effectively up the corporate hierarchy), assessment of potential derailing characteristics allows the coach to offer 'preventive maintenance' that will reduce the likelihood of problems emerging in the future.

The nature of dysfunctional dispositions

Dysfunctional dispositions are part of everyone's personality. We prefer to think of 'personality' in terms of a person's 'reputation' among those in his or her social environment. Personality trait descriptors (e.g. conscientious, flamboyant, volatile, confident, etc.) summarize how a person is seen by others. The 'strength' of any personality characteristic reflects the likelihood that a person will behave (and be perceived) in a certain way during social interaction. The widely accepted 'Five-Factor Model' (FFM) of personality (Goldberg, 1981; John, 1990; McCrae & Costa, 1987; Wiggins, 1979) identifies primarily positive characteristics, and assessments based on this model predict success in a wide variety of employment contexts (Barrick & Mount, 1991; Bono & Judge, 2004; Hogan & Holland, 2003; R. Hogan, 2007; R. Hogan & Hogan, 2007; R. Hogan, Hogan & Roberts, 1996; Judge et al., 2002; Mount, Barrick & Stewart, 1998; Tett, Jackson & Rothstein, 1991). The prediction of occupational performance improves when the dimensions of the FFM are aligned with the competencies judged to be important for a specific job (Anderson et al., 2006; Campbell, 1990; J. Hogan & Holland, 2003; Hough, 1992; Hurtz & Donovan, 2000).

Assessments derived from the FFM reveal what might be described as the 'bright side' of personality. Dysfunctional dispositions, in contrast, reflect the 'dark side' (cf. Conger, 1990; R. Hogan & Hogan, 2001). These behavioural characteristics degrade executive performance and interfere with the individual's capacity to capitalize on the strengths revealed through FFM assessments. The past 20 years have produced a growing interest in these dark side characteristics, particularly for people in leadership roles (Furnham & Taylor, 2004; Goldman, 2006; Judge, LePine & Rich, 2006; Khoo & Burch, 2008; McCartney & Campbell, 2005; Moscoso & Salgado, 2004; Najjar, Holland & Van Landuyt, 2004). These studies have repeatedly found that managers who derail are as technically skilled as those who do not.

Instead, managerial incompetence is primarily associated with 'personality defects,' troubled interpersonal relationships, inability to build a team, lack of follow-through, and difficulty making strategic transitions (cf. Lombardo, Ruderman & McCauley, 1988; McCauley & Lombardo, 1990).

Flawed interpersonal behaviours reflect the influence of underlying mental models or 'schemas.' Schemas are organized knowledge structures through which we encode our perceptions of social interaction, allowing us to make sense of our own behaviour and the behaviour of others (Fong & Markus, 1982; Kihlstrom & Klein, 1994; Markus, 1977; Sedikides, 1993; Young, Klosko & Weishaar, 2003). Personal schemas reflect our basic beliefs about ourselves and the world – beliefs that are based on early life experiences. Schemas function automatically outside conscious awareness, serving as perceptual 'filters' that cause individuals to interpret social information in ways that fit schema-relevant expectations (Baldwin, 1992). Thus, schemas tend to be self-perpetuating. For example, individuals who were frequently criticized early in life may develop belief structures – schemas – that they are likely to be criticized in current interpersonal encounters. These people may even interpret innocuous feedback as critical, and they may become overly perfectionistic or accommodating to minimize the risk of anything they might construe as criticism from others.

Several variables affect the likelihood that dysfunctional behaviour will emerge in any given social or leadership context. First, the probability of dysfunctional behaviour reflects the strength of the relevant underlying schema; certain ineffective interpersonal patterns are simply more likely for some people than for others because the relevant underlying schema exerts a more pervasive influence on overt behaviour. Second, situational factors will affect the emergence of dysfunctional behaviour. Most people can manage dysfunctional tendencies most of the time. But stress, work over-

load, fatigue, high emotion, and lack of social vigilance can increase the probability of maladaptive behaviour. Furthermore, dysfunctional behaviour is more likely to appear in situations that are ambiguous (Green & Sedikides, 2001; Koch, 2003), where leaders have too little structure and too much discretion (Kaiser & Hogan, 2007), or that resemble the situations that produced the relevant schema in the first place. Finally, organizational culture can potentiate dysfunctional behaviour (Balthazard, Cooke & Potter, 2006; VanFleet & Griffin, 2006). Thus, personality, situational, and organizational influences interact to influence the emergence of dysfunctional behaviour in any given performance or interpersonal context (cf. Tett & Barnett, 2003; Tett & Guterman, 2000).

Assessment of the dysfunctional dispositions that commonly appear in interpersonal relationships – performance risks – allows us to predict the likelihood that such risks will impair an executive's success. To facilitate such predictions R. Hogan and Hogan (1997; see also R. Hogan & Hogan, 2001) created an inventory (the Hogan Development Survey; HDS) that assesses 11 of these characteristics. Constructs included in the HDS were identified through an exhaustive review of material ranging from research on managerial derailment to the 'personality disorders' section of the Diagnostic and Statistical Manual of Mental Disorders, fourth edition (American Psychiatric Association, 1994; see Hogan & Hogan, 1997, 2001, for a description of the links between certain personality disorders and the scales comprising the HDS). Hogan and Hogan (1997) designed the HDS to address common interpersonal themes in the work context that can undermine an individual's effectiveness. Each theme is associated with an underlying cognitive schema that facilitates understanding of the expectations, attributions, and mental models that underlie interpersonal strategies that ultimately prove counterproductive. Listed below are the 11 constructs comprising the

HDS and a brief description of the schemas associated with each pattern of dysfunctional interpersonal behaviour:

Excitable. High Excitable individuals are emotionally volatile and easily disappointed in projects, people, or organizations. They alienate employees through unpredictable displays of anger or frustration. These executives seek understanding and respect, but conditions early in life led them to believe that others will ultimately disappoint or exploit them. As a result, they are constantly vigilant for signs of possible rejection, giving up easily and ready to strike out emotionally or withdraw from those whom they expect will let them down. Strong displays of emotion allow the person an illusion of control while simultaneously keeping others at an emotional distance where they are ultimately less threatening.

Skeptical. High Skeptical executives mistrust others' motives and doubt their intentions. They expect mistreatment; as a result, they are quick to find it. In such situations, they may recoil in an angry or combative manner to gain control and distance themselves from others. In the workplace, they are often shrewd, politically sensitive, and difficult to fool. However, their cynicism leads them to distrust authority and to fear that subordinates will attempt to circumvent them. These beliefs underlie a contentious interpersonal style characterized by irritability, argumentativeness, and insensitivity to criticism.

Cautious. High Cautious individuals fear criticism and are quick to feel rejected. They are careful, conservative, and worried about making mistakes. They attribute unsuccessful experiences to an inherent defect that sets them apart from others. They avoid giving other people the opportunity to see their deficiencies. Even positive feedback can be distorted or discounted. While no one enjoys criticism, these individuals cannot tolerate the unpleasant feelings associated with making a mistake; as a result, they seek to avoid unpredictable events such as social interactions and decision making.

Reserved. High Reserved leaders prefer social isolation. They dislike working in teams or meeting new people. Others find them difficult because they tend to be withdrawn and uncommunicative. They lack social sensitivity – the capacity to notice and respond effectively to the needs and feelings of others. They believe that life is best lived on a purely rational basis. As a result, they are typically impervious to both praise and criticism and rarely offer such feedback to others. They prefer that others perceive them as tough, resilient, and self-sufficient.

Leisurely. As a result of early socialization experiences, the high Leisurely leader avoids direct expressions of annoyance and frustration. He or she expresses such feelings in indirect ways. Persons in positions of authority are typically perceived as either incompetent or unfair. In reaction, the high Leisurely person believes in the right to pursue a personal agenda at his or her own pace. He or she envies those who are successful but at the same time resents them and maintains an illusion of self-sufficiency and self-respect by covertly resisting expectations.

Bold. High Bold individuals believe they are unique or exceptional in some way. The high Bold executive was often the ‘golden child’ of the family, lacking the boundaries and discipline that help children learn and respect their own and others’ limits. This individual believes that he or she should not have to accept subordinate positions and should be exempt from difficult or dull tasks. The high Bold leader is sublimely insensitive to the impact of his or her behaviour on others, believing that subordinates should eagerly contribute to the leader’s personal progress.

Colourful. High Colourful persons are naturally extraverted and gregarious. However, they often mistake attention for accomplishment. Historically, attention and affirmation were predicated upon charm, appearance, and the capacity to entertain. Far less attention was paid to competence, persistence, and achievement. These individ-

uals covertly doubt their real abilities and fear that others will notice their ‘weaknesses.’ Under stress, the high need for approval leads to exhibitionistic and ‘enter-taining’ behaviours in place of real productivity.

Imaginative. The high Imaginative person shares with the high Reserved individual an insensitivity to social cues. As the Reserved person withdraws, however, the high Imaginative leader relishes social interaction as an arena for sharing novel ideas, opinions, and styles. High Imaginative individuals believe in their own uniqueness and a need to emphasize creativity over practicality. They value inner experience to define reality, not what others might consider rational or objective. Viewing themselves as special, they are typically immune to criticism and rejection.

Diligent. High Diligent individuals grew up in environments that valued high levels of performance, criticizing work that was judged to be substandard in some way. As a result, these individuals believe that only two options are possible in any performance situation: perfection and failure. There is no room for ‘shades of gray.’ Indeed, they often have difficulty judging the realistic importance of any given task. They distrust autonomous thinking; as a result, they value rules, standards, and social custom to define the appropriate response in a performance situation.

Dutiful. High Dutiful leaders enjoyed a nurturant environment early in life; however, caregivers failed to ‘pull back’ as the child became more capable of self-sufficiency. Lacking mastery experiences, this individual did not develop a sense of competence and self-efficacy, continuing to believe that he or she must rely on others for important decisions. The unpredictable or unknown is avoided, as the high Dutiful person doubts his or her capacity to cope successfully with novel challenges or situations. Belief in the self as ‘weak’ impairs this executive’s capacity to think independently.

‘Dark Side’ characteristics and coaching

Personality predicts leadership effectiveness. Knowledge of an executive’s personality should facilitate coaching efforts and the ultimate success of a leadership development programme. It is somewhat surprising, therefore, that very little attention has been given to the links between personality and coaching. Two recent papers are exceptions. Stewart et al. (2008) assessed the relationship between an executive’s scores on a five-factor personality measure and ‘transfer of learning’ from the coaching environment to the workplace. Coaching appeared to be most effective for executives scoring high in emotional stability, conscientiousness, and openness to experience, and conscientiousness was a robust predictor of the executive’s use of newly developed skills in his or her day-to-day managerial activities. In a similar vein, McCormick and Burch (2008) offered a taxonomy of coaching targets linked specifically to the executive’s scores on assessments derived from the five-factor model. For example, McCormick and Burch (2008) recommend that executives scoring low on Extraversion be encouraged to work to remember people’s names, learn conversation skills, create enthusiasm and excitement within their teams, etc.

Many authors have suggested that a variety of ‘intrapersonal’ factors may degrade managerial performance and should, therefore, be addressed in the context of executive coaching. Kaiser and Kaplan (2006) and Johnson (2008), for example, argue that dysfunctional interpersonal behaviours frequently reflect distorted beliefs and flawed ‘mental models’ that an executive may have about the self and others in the environment. Kaiser and Kaplan (2006) suggest that effective coaches must be prepared to confront the subtle fears of failure, inadequacy, and rejection that can cloud the executive’s judgment and impair interactions with subordinates and peers. This viewpoint echoes Kilburg’s (2000, 2004) emphasis on the value of psychodynamic constructs in coaching. Indeed, the popular

concept of ‘emotional intelligence’ assumes that effective coaching allows executives to transcend flawed views of the self and others to create a management style marked by self-awareness, empathy, and interpersonal sensitivity (Salovey & Mayer, 1990; Goleman, 1998).

Assessment of dysfunctional dispositions enhances the precision and potential effectiveness of coaching in at least three ways. First, the relationship between the coach and the executive is an interpersonal relationship that the coachee is likely to find somewhat stressful. As such, dysfunctional interpersonal strategies tend to emerge in the relationship. Knowledge of the executive’s potential responses allows the coach to anticipate problems and craft the relationship accordingly. Second, enhanced ‘self-awareness’ is an essential precursor to meaningful change. The results of a ‘dark side’ assessment can help the executive make sense of any negative feedback received from others (e.g. the results of a 360-degree assessment). Third, being aware of the executive’s typical dysfunctional interpersonal patterns will allow the coach to choose specific targets for developmental intervention and identify the intervention strategies most likely to be effective. We examine each of these domains in more detail.

Crafting the coaching relationship

The quality of the relationship between the coach and the executive is critical for the ultimate success of the coaching effort. First and foremost, the coach must create an atmosphere of trust so that the executive can risk being honest about his or her concerns, perceptions of others in the organization, and expectations for coaching itself. Second, the coach must be perceived as an expert in facilitating change and knowledgeable about business processes, the status of the executive’s organization, and the nature of effective leadership. Finally, the coach must be able to respond empathically to coachees, allowing them to feel respected and under-

stood even as they develop new self-perceptions, understand how others perceive them, and learn how to lead more effectively. Kemp (2008) notes that, although the coaching relationship is important for the success of developmental efforts, little attention has been directed to this aspect of coaching. The relationship between the coach and the executive is a 'real relationship.' If the effectiveness of coaching is influenced by the quality of the relationship, then it is important to consider the qualities that the coach and the executive bring to the interaction.

As we suggested above, people organize their interpersonal experiences in terms of schemas. These schemas influence perceptions, information processing, attributions about the causes of events, etc. It makes sense, then, to assume that the executive will bring to the coaching process a set of beliefs and expectations that will influence his or her reactions to the coach and, ultimately, readiness for change. These expectations may be shaped by a number of factors: the context in which the executive was referred for coaching, the attitudes communicated (either implicitly or explicitly) by senior management about the value of coaching, and the extent to which others in the organization are concurrently receiving coaching (Gilpin-Jackson & Bushe, 2006; Ruvolo, Petersen & LeBoeuf, 2004). But the executive also brings to coaching the same schemas and interpersonal strategies that influence his or her other relationships. To the extent that these schemas are associated with dysfunctional interpersonal strategies, these strategies are likely to emerge in the coaching relationship as well. Awareness of this allows the coach to anticipate roadblocks to the development of a productive relationship and ways the executive is likely to 'push back' against developmental recommendations. The coach can then craft the relationship to reduce the influence of these factors.

Consider, for example, an executive with a high score on the Excitable scale of the Hogan Development Survey, a 'dark side' measure. This executive seeks affirmation but expects disappointment, and occasionally uses emotional displays to create distance from others. He or she may initially respond to coaching with enthusiasm, leading the coach to be optimistic about his/her readiness for change. But the executive is also likely to be easily discouraged with coaching, perhaps even responding angrily to negative feedback or to the coaching process itself. In contrast, an executive scoring high on the HDS Mischievous scale is likely to be charming and overtly responsive to the coach's efforts. But high Mischievous individuals have difficulty taking responsibility for their behaviour and tend to ignore the expectations that others hold for them. Such people often perceive coaching as irrelevant and show little follow-through or 'transfer of learning' into the day-to-day work environment. In both examples, knowledge of the executive's scores on scales tapping 'flawed interpersonal strategies' will allow the coach to predict problems and plan the coaching effort accordingly. For the high Excitable individual, the coach could predict disillusionment early in the relationship, offer heightened empathy in presenting feedback, and take steps to ensure that commitment to the process is maintained. For the high Mischievous coachee, the coach could remain constructively skeptical of the executive's expressed enthusiasm, building into the coaching process multiple 'accountability checks.'

The flawed interpersonal strategies that may be problematic (or potentially problematic) in the executive's work environment are likely to recapitulate in the coaching relationship. As the old saying goes, 'forewarned is forearmed.' Assessment of 'dark side' characteristics prior to or early in the coaching process allows the coach to be sensitive to these self-defeating behaviours and plan accordingly to minimize the extent to which they can interfere with effective coaching.

Enhancing strategic self-awareness

Much of our behaviour is automatic and repetitive: we tend to do what has seemed to work in the past. It is the novel, the unexpected, and the discomfiting that motivate self-reflection and change. Correspondingly, expanded self-awareness is a cornerstone of most coaching interventions. R. Hogan and Benson (in press) argue that meaningful self-awareness (which they label 'strategic' self-awareness) requires, first, understanding one's strengths and limitations and, second, understanding how they compare with those of others. Hogan and Benson note that introspection alone cannot meaningfully enhance strategic self-awareness; rather, such awareness requires performance-based feedback derived from structured assessment. In other words, executives need feedback on their habitual ways of dealing with people. Armed with this information, leaders can devise plans to expand their capabilities (add new skills), expand their capacity (improve existing skills), or compensate for shortcomings. Information that focuses only on the positive fails to address genuine limitations – performance improves only when people know what they are doing wrong, and even strengths can turn into problems after a point (Kaplan & Kaiser, in press).

Most coaching includes some type of performance evaluation highlighting the executive's strengths and weaknesses. Often these evaluations are in the form of 360-degree ratings derived from assessments offered by higher-level executives, peers, and subordinates. Multisource feedback ratings correlate well with other measures of leadership effectiveness (Smither, London & Reilly, 2005); indeed, Shipper and Wilson (1991) found that subordinate's ratings of a leader's performance are more highly associated with team effectiveness than either peer or superior ratings. Thus, ratings offered by those who work for the executive may be critically important in facilitating strategic self-awareness and identifying areas for potential change. But feedback derived from others' perceptions is typically insufficient in itself to

motivate lasting change in leader behaviour (Craig & Hannum, 2006; Gregory, Levy & Jeffers, 2008; Kluger & DeNisi, 1996; London & Smither, 2002). Executives at risk for derailment are unlikely to benefit from feedback alone, as they are typically self-absorbed, unwilling to take responsibility, and reluctant to learn from their mistakes (J. Hogan, Hogan & Kaiser, in press).

This, of course, is where coaching can be particularly important. Armed with both multirater and personality assessment data, the coach can assist the executive in making sense of the perceptions of both subordinates and others. Consider, for example, an executive who is referred for coaching because the team's productivity is declining and staff morale is low. Multirater assessment reveals that subordinates view the executive as too forceful and inadequately facilitative. Assessment of 'dark side' characteristics can help pinpoint the behaviours that contribute to negative staff perceptions. For example, if the leader scores high on the Reserved scale of the HDS, we can conclude that the executive tends to withdraw, to appear tough and cold, and to lack empathy for staff concerns. In contrast, if the executive scores high on the Bold scale, it is likely that he or she is self-centered, fails to accept responsibility for mistakes, and sees staff as a tool to further his or her career progress. To the degree that the coach can help the executive make sense of the subordinates' ratings, this will increase the client's strategic self-awareness.

Identifying targets and strategies for development

A cursory review of the executive coaching literature reveals a wide variety of developmental interventions. Coaching strategies range from deep-muscle relaxation to asking colleagues for ongoing feedback to assertiveness training to instruction in strategic problem solving. Riggio and Lee (2007) provide an extensive review of techniques to help executives develop the competencies critical for effective leadership. The questions, of course, are what techniques to

employ, where to begin, and how. In many cases, the answers to these questions will be shaped by the context of coaching, the agreements reached between the client organization and the coach, etc. In other cases, the coach will have more latitude in identifying both the targets for coaching and the intervention strategies employed.

There is considerable debate in the literature on the difference between coaching and psychotherapy: is the coach a counsellor or a technical consultant on matters of behaviour change (Hart, Blattner & Leipsic, 2001; Joo, 2005; Witherspoon & White, 1996)? Although there are differences between coaching and therapy (Gray, 2006; Levinson, 1996), effective coaches move along the continuum between them to deal with the needs of the executive and his/her organization. Further, the coach has a responsibility to identify and intervene with the factors most likely to enhance the executive's leadership – despite what he, she, or the organization think the executive's needs are. Any development target will be the product of several different causal processes. Coaching tends to emphasize proximal rather than distal causes (which are often the focus of traditional psychotherapy). Even so, a development issue can be caused by factors ranging from insufficient social skills to faulty cognitive schemas. The distinction is important: skills development approaches will fail if the problems are a result of deficits in intrapersonal self-regulation or flawed interpersonal strategies. Coaching is not simply 'a technology followed by a formula' (Schein, 2003, p.80).

Assessment provides the key for deciding between the 'what' and 'how' of executive development. Consider an executive whose multirater feedback indicates insufficient 'forceful' leadership. This person has difficulty being appropriately assertive, setting clear expectations, and holding staff accountable for their performance. Senior management fears that this talented executive may derail if she cannot find a balance between enabling and forceful leadership.

The coach might design a programme of role-playing, behaviour rehearsal, and graduated practice to help the executive become more appropriately assertive. This is a well researched and widely accepted behavioural intervention for unassertive individuals. But what if assessment of dysfunctional interpersonal dispositions reveals this executive be highly Cautious? In this case the executive would be influenced by fear of failure, aversion to risk, and expectations of criticism. Although behavioural techniques can sometimes 'work backward' to modify existing schemas, it is usually more effective to address the schema directly using well established cognitive techniques (cf. Ducharme, 2004; Grieger & Fralick, 2007; Young et al., 2003). When the executive becomes aware of his/her possible mistakes and flawed behaviour, behavioural interventions are likely to be significantly more effective.

Thus, if a 'dark side' assessment indicates that potential derailing patterns are 'within normal limits' a coach may use directive interventions targeted to improving existing skills or the acquisition of new ones. In this case, the coach may be functioning as a 'technical consultant.' But if the assessment reveals the influence of distorted cognitive schemas, these will need to be addressed before behavioural interventions will be productive. In this case, the distinction between coach and counselor blurs considerably.

Conclusion

Coaching is intended to help executives become more effective leaders. Ineffective leadership is more common than many believe, and bad leaders not only reduce the productivity and profitability of the business units for which they are responsible, they also create misery, anxiety, and hostility among those who report to them. Personality predicts both effective and ineffective leadership. Dysfunctional characteristics – flawed interpersonal strategies that can derail an executive's career – are associated with specific cognitive schemas that cause the behaviour of self and others to be

perceived in maladaptive and unrealistic ways. Assessment of these 'dark side' characteristics facilitates coaching by enhancing the coach's ability to develop the coaching relationship according to the personality of the executive, help the leader make sense of interpersonal experiences and multilater feedback, and target developmental interventions to the specific needs and characteristics of the executive.

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Expert Opinion:

Executive Coaching: A real world perspective from a real-life coaching practitioner

Marshall Goldsmith

AS AN EXECUTIVE COACH, I am asked to work with extremely successful leaders who want to get even better. I work with these leaders to achieve positive, measurable, long-term change in behaviour.

The challenge, and the reason executive coaches are often hired, is that the leadership behaviour that was associated with yesterday's results may not be the behaviour that is needed to achieve tomorrow's innovation. In almost all cases, even the most successful leaders can increase their effectiveness by changing certain elements of their behaviour. And, while we can easily see the need to change the behaviour of others, we often have great difficulty in changing ourselves!

Executive coaches have the challenge of helping leaders help themselves and of helping them make the changes that will take their teams to the 'next level'.

This definition of an 'executive coach' wasn't always so apparent to me. It is a definition more than three decades in the making. As a matter of fact, I began my executive coaching career by accident! I was working with a CEO who said, 'We have this young guy working with us who is smart, dedicated, hardworking, driven to achieve, entrepreneurial, and gets results. He is also an arrogant, stubborn, opinionated know-it-all. We don't think he is living our values. It would be worth a fortune to me if we could turn him around.' I heard the word *fortune* and said, 'Maybe I can help!' He said, 'I doubt it.' That's when I came up with my idea: 'I will work with him for a year. If he gets better, pay me. If he doesn't get better,

it's all free!' The CEO said, 'Sold!' Perhaps the biggest challenge I faced was getting over my own ego. It finally dawned on me that my clients don't get better because of me. They get better because of themselves and the people around them. If their drive to improve doesn't come from them, it won't happen.

Follow-up or fail

My partner, Howard Morgan, and I measured the impact of leadership development programmes on increased leadership effectiveness, as judged not by participants, but by their co-workers six months later. We found that participants who do not follow-up make no progress, while those who return from the programmes, practice what is taught, discuss what they learn with co-workers, and do regular progress checks are seen as becoming more effective leaders.

The people who improve the most have a support group or network that holds them accountable. Many executive coaches are paid for activities – not results. They get paid based on the time they spend and because their clients like them. I don't get paid because my clients like me nor do I get paid for spending time. I get paid if my clients get significantly better on pre-selected behaviours, as judged by the people who work with them and their managers.

My mission is helping successful leaders achieve a positive long-term change in behaviour. I don't work on reformation projects. If companies are thinking about firing an executive, I don't want to work with this person. I no longer try to convince anyone to

do anything. I just say, 'Ask yourself. Is this the right thing to do? If it is, do it. If it's not, don't do it.' There are two elements of what I do in coaching: one is required; the second is optional. If my clients don't want to do the required; then I don't work with them. I just say, 'Why waste my time and yours?' The required part is that my clients must agree that I will interview all of their pre-selected co-workers. The CEO either picks the co-workers or agrees that they're the right co-workers.

After interviewing my clients' co-workers, I develop a profile of their leadership behaviour. My report contains confidential, anonymous feedback. I then spend time with the co-workers to help them help my client. I tell the co-workers, 'I'm going to be working with my client, Joe, for the next year. I won't get paid if Joe doesn't get better. *Better* is not determined by Joe (or by me) – *better* is determined by you.' I then continue, 'I have four requests for you: (1) Let go of the past (simple but not easy); (2) Swear to tell the truth (it increases the odds they will); (3) Be a positive and supportive coach for my client – not a cynic, critic, or judge; and (4) Pick something that you want to do better. My client will reach out to you and say, 'I want to get better at X.' You can then say, 'Please help me get better at Y.' This way hundreds of people end up getting better – all because we decide to help more and judge less.' After reviewing their feedback, my clients talk with each of their co-workers.

My client says, 'Here are the positive things that I have learned about myself. Here is what I want to change.

I can't change the past, so please give me ideas on how I can do a better job in this behaviour in the future.' I tell my clients: Never promise to do everything that your co-workers suggest. Leadership is not a popularity contest.

Just listen. Be quiet, think about what you are learning and then say 'thank you.' Tell them, 'I can't promise to do everything you suggest, but I can promise to listen and do what I can!' After my clients talk with their

co-workers, they talk with me. I review what they have learned and give them my ideas. Not all of my ideas are brilliant.

I reserve the right to be wrong. I ask my clients to only use the ideas that work for them. They have a disciplined follow-up process with their co-workers.

They then get measured on their improvement in identified behaviours, leadership effectiveness, and their follow-up with each co-worker. Leaders who stick with the process get better.

People who care

Rather than force people to participate in leadership development, set strict guidelines on who is allowed to participate. If participants won't commit to follow up and apply what they learn, don't waste time, money, and energy on training them. Put all your energy into those people who care.

Successful people want to win, and it's hard for them not to win. I asked one of my CEO clients, 'What have you learned since becoming CEO?' He sighed, 'My suggestions become orders.' If you're the CEO, you always win. You need to learn to let others win.

My typical client is a multi-millionaire, brilliant, dedicated, hardworking person who sincerely wants to get better. Each one will admit that none of this stuff is easy. It's hard to change! I find it ironic that companies say, 'We're going to transform our leaders by having them sit through a two-day programme.' Yeah, right! This compulsive need to win at everything you do can easily become a habit.

To help leaders break the habit, I tell them, 'Your co-workers and I will give you ideas. Even if you think our ideas are stupid, don't argue with us or critique our ideas. Just say, 'thank you'. If you don't like our suggestions, don't do them.'

People listen much better when they don't have to prove how smart they are. So I teach my clients how to listen without composing their next comment to prove how smart they are.

Another leadership challenge is the tendency to add too much value. For example, if I come to you, my boss, with an idea, and you think it's a great idea, you'll likely say, 'That's a great idea, but let's add this to it.' Well, the quality of the idea may go up five per cent; however, my commitment to execution may go down 50 per cent. It's not my idea anymore. It's now become your idea. It's hard for smart, successful people not to constantly add value. You need to ask, 'Is it worth it?' before you speak.

Everyone around the people I coach knows exactly what my clients are trying to improve. If you want others to develop, start with yourself and let other people watch you try to get better.

Almost all executive education is based on the myth: If they understand, they will do. Somehow we pretend that if you post the right word, say the right phrase, or talk about the right technique, people will do the right things. If that were true, then why are so many people fat? Go on a diet and work out every day! It's not hard to understand. It's hard to do! The challenge in leadership development is not making sure that leaders understand the practice of leadership – it is making sure that leaders practice their understanding.

Why measure it?

Part of being an effective leader is setting up systems to measure everything that matters, including important soft-side values: how often we're rude to people, how often we're polite, how often we ask for input, how often we bite our tongue rather than say an inflammatory remark.

If you track a number, you remind other people that you are trying. It's one thing to tell your employees or customers that you'll spend more time with them. It's another if you attach a real number to that goal, measure it, and make people are aware of it.

Everything is measurable, from days spent communicating with employees to hours invested in mentoring a colleague. All you have to do is look at your calendar or watch – and count.

Setting numerical targets makes you more likely to achieve them. Creating an income statement for the soft stuff will make you a better leader.

Behavioural coaching for executives

Behavioural coaching is just one branch in the coaching field. This process can be very meaningful and valuable for both top executives and high-potential future leaders.

People often ask me, 'Can executives, or anyone, really change their behaviour?' Yes they can. If they didn't we wouldn't get paid. And, when it comes to changing behaviour, even a seemingly small, positive change from a top executive can have a huge impact on the rest of the organization. The fact that the executive is trying to change may be even more important than what the executive is actually trying to change. In even attempting behavioural change, the executive is being a great role model for personal development and that is what coaching for leadership is all about.

Leadership coaching transforming mental health systems from the inside out: The Collaborative Recovery Model as person-centred strengths based coaching psychology

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Mental health service provision is being transformed by a call for 'recovery oriented care'. Rather than the traditional medical meaning of cure, the term 'recovery' refers to the personal and transformational process of patients living with mental illness, moving towards a preferred identity and a life of meaning – a framework where growth is possible, and the fixed mindsets around diagnoses such as schizophrenia are challenged. At an organisational level, however, organisations and their service providers have typically operated on a framework that is fixed in terms of the potentialities of the mental health patients. This paper describes the ongoing transformation of a large tertiary inpatient mental health unit in Ontario, Canada, through a parallel staff and patient implementation of a person-centred strengths based coaching framework, known as the Collaborative Recovery Model (CRM). Consistent with developments in positive psychology, the model focuses on strengths and values, goals and actions, within a coaching framework, with an emphasis on the alliance between staff and patient, and the growth potential of the patient. By using the principles of coaching psychology, mental health staff members are leading change in the organisation by personal use of the principles and practices that they are also using to coach patients. The leadership and organisational change challenges are described and future directions are discussed.

Keywords: positive leadership, strengths coaching, mental health recovery, growth mindset.

THE TRADITIONAL STEREOTYPE of a person with a mental illness in a mental hospital is not one that is usually congruent with the stereotype of a high functioning leader. In fact, some coaching psychologists and proponents of positive psychology may use the 'positive focus' of their endeavours to conveniently sidestep the sustaining challenges of serious mental illness. The organisational and personal challenges within mental health systems and personal recovery from mental illness are however major opportunities for effective leaders to have an impact. Important questions emerge. What leadership is required at organisational, staff and patient levels in the area of serious mental illness? What opportunities does the recovery movement bring?

What does this all have to do with coaching psychology, leadership coaching and applied positive psychology?

In this paper we will introduce the 'recovery movement' in mental health that is challenging the policy and practices in many nations regarding mental health service provision (Slade, Amering & Oades, 2008). Key aspects of this movement will be related to components of positive psychology, particularly Dweck's (2006) construct of a growth mindset and the strengths focus.

The Collaborative Recovery Model (Oades et al., 2005) is then introduced as a staff development model for mental health practitioners, working with people with serious mental illness. The model was specifically designed to be consistent with the

recovery movement due to its strength, goals and growth focus. The use of the CRM is conceptualised as a form of person-centred strengths coaching. The use of a parallel process is then introduced, in which mental health staff use the same protocols (e.g. strengths/values identification, goal setting, action planning and homework) as the patients. That is, patient coaching by staff mirrors the coaching staff receive in both process and form. Staff members are empowered to use the positive principles of leadership coaching in their personal and professional life, and with their patients. This leadership from 'the inside-out' (Bianco-Mathis, Nabors & Roman, 2002) is consistent with the personal responsibility emphasised within the recovery movement (Andresen, Oades & Caputi, 2003). Specific examples are then provided of coaching patients and how this method is different from traditional mental health care.

The challenges of transforming mental health service provision are then described with specific reference to coaching staff in a large inpatient mental health unit in Ontario, Canada, and how coaching may be used to overcome poor transfer of training. It will be argued that the concept of 'positive leadership' is particularly relevant to the challenges of mental health organisations due to their vulnerability to burnout and scepticism regarding human potential (Cameron, 2008; Kase, 2009). Future directions for this unit are described.

Mental health recovery, positive psychology and the growth mindset

Slade, Amering and Oades (2008) assert that whilst there has been a significant increase in the use of the term 'recovery' in English speaking mental health systems, that there is a need for conceptual clarity around the term. These authors refer to 'clinical recovery' as the definition traditionally used in mental health services, which refers to sustained remission. The authors argue that this locates the term within an illness frame of understanding, and equates recovery with

long-term reduction or ideally removal of symptomatology, accompanied by functional improvement. The second definition, 'personal recovery', emerged from patients who have lived with long term illness. This definition emphasises the individualised, lived experience. To assist clarification of the definition of recovery, particularly personal recovery, Slade et al. (2008) offer a consensus statement involving 10 principles and descriptions as follows: (1) Self-direction – Consumers lead, control, exercise choice over, and determine their own path of recovery; (2) Individualised and Person-Centred – There are multiple pathways to recovery based on the individual person's unique needs, preferences, and experiences; (3) Empowerment – Consumers have the authority to exercise choices and make decision that impact their lives and are educated and supported in so doing; (4) Holistic – Recovery encompasses the varied aspects of an individual's life including mind, body, spirit, and community; (5) Non-linear-Recovery is not a step-by-step process but one based on continual growth with occasional setbacks; (6) Strengths-Based-Recovery focuses on valuing and building on the multiple strengths, resiliency, coping abilities, inherent worth, and capabilities of the individual; (7) Peer Support – The invaluable role of mutual support in which consumers encourage one another in recovery is recognised and promoted; (8) Respect – Community, system, and societal acceptance and appreciation of consumers - including the protection of consumer rights and the elimination of discrimination and stigma – are crucial in achieving recovery; (9) Responsibility – Consumers have personal responsibility for their own self-care and journeys of recovery; and (10) Hope – Recovery provides the essential and motivating message that people can and do overcome the barriers and obstacles that confront them.

Examination of the 10 principles of personal recovery outlined by Slade et al. (2008) reveals convergence with the assump-

tions of positive psychology, with 'strengths based' and 'hope' being the most obvious overlaps. Resnick and Rosenheck (2006) have described parallel themes and potential synergies between recovery and positive psychology, with particular emphasis on strengths. The importance of hope in personal recovery was documented by Andresen, Oades and Caputi (2003), paralleled by Hope Theory (Snyder, 2000) within positive psychology literature. Likewise Joseph and Linley (2008) have developed the concept of post-traumatic growth, particularly relating to post-traumatic stress. Keyes' (2002) work on flourishing and the mental health continuum has significant conceptual consistency with personal recovery.

Dweck (2006) differentiates between the fixed mindset and the growth mindset. People with fixed mindsets believe that their basic qualities like intelligence or talent are fixed traits. They may then spend time documenting their intelligence or talent rather than developing it. They may also believe that talent alone creates success, without effort. Dweck contrasts the fixed mindset, with a growth mindset. A person with a growth mindset believes that his/her most basic abilities can be developed through hard work, leading to a love of learning and resilience.

It is our proposition that mental health systems and diagnosis of serious mental illness, such as schizophrenia, have reinforced fixed mindsets, that is 'a person with schizophrenia cannot function because of the illness, it is fixed'. The 'recovery' movement, however, a term co-opted by mental health patients to say it is 'our recovery' so 'we will use the term how we please' has began to emphasise that growth and development is possible, despite symptoms of illness. The challenge remains, however, to change the mindset of staff and patients who may have developed fixed mindsets about the abilities of patients. The existence of a medical condition is not being questioned here, rather the assumptions around the person's abilities with the medical condition

is at question. The leadership question is how to transform mental health organisations and cultures towards such a change.

The CRM now described emphasises the growth focus of recovery, and directly includes training on staff and patient mindsets towards developing abilities. This focus, combined with a strengths coaching framework are applied positive psychology principles in action within environments and organisations that are not construed as positive.

Collaborative Recovery Model as person-centred strengths coaching psychology

Oades et al. (2005) first described the CRM as a model that assists clinicians to use evidence based skills with consumers in a manner consistent with the recovery movement. In its origin the CRM informed the CRM training programme and was focussed directly on training mental health staff. The model has now expanded to be used as a staff development programme, involving training and coaching. Moreover modules of self-development for consumers (Oades et al., 2008) have been developed, as has carer components and the need for whole of organisation transformation has been recognised. The key principles and components of the CRM are illustrated in Table 1.

Observation of Table 1 will reveal that only Guiding Principle 1 makes any reference to illness (i.e. Recovery) and the rest of the model, based within a collaborative relationship, is effectively a goal striving cycle-consistent with previous life coaching with a hope focus (Green, Oades & Grant, 2006). It is for this reason we refer to it also as a person-centred (Joseph, 2006) and strengths based coaching model (Linley & Harrington, 2006a, 2006b).

Crowe et al. (2006) reported significant improvements in staff attitudes when trained in the CRM. However, Uppal et al. (in press) report the significant difficulties in transfer of training in multiple Australian mental health services aiming to implement this model. For this reason, a coaching pro-

Table 1: Key components of the Collaborative Recovery Model.

Guiding Principle 1	Recovery as an individual process
Guiding Principle 2	Collaboration and autonomy support
Component 1	Change Enhancement
Component 2	Strengths and values clarification
Component 3	Collaborative Visioning and Goal Striving
Component 4	Collaborative Action Planning and Monitoring

gramme has been implemented with staff to supplement the training component. Moreover, protocols have been revised to further emphasise the coaching nature of the intervention itself.

The training and coaching competencies for mental health staff are illustrated in Table 2. In addition to the six modules of training, there are three modules for recovery champions (i.e. the group responsible for initiating and sustaining organisational change). Table 2 also illustrates the explicit inclusion of the growth mindset, which we view as central to staff development if recovery oriented care is to be possible.

Table 2 refers to three key protocols, illustrated in Figure 1, to assist implementation of the coaching model (Oades & Crowe, 2008). The ‘Camera’ is a simple strengths and values clarification exercise that is used in collaboration with mental health consumers, and used for the professional development of mental health staff. Coachees are asked to list a personal strength or value clockwise around the ‘lens’ of the camera and then indicate how effectively they have been utilising that strength, or implementing that value in the last 30 days. The ‘Compass’ is a visioning and goal setting instrument, adapted from previous work on the CRM (Clarke et al., 2006), based on established goals striving evidence (Sheldon & Elliott, 1998, 1999; Sheldon, 2001). The ‘Compass’ assists people to set specific, measurable, realistic and time-framed goals by asking them to identify three levels of goal attainment, for a goal that is consistent with values identified

within the ‘Camera’. The ‘MAP’ is an action planning instrument based on behavioural change and homework principles (Kelly et al., 2006). The ‘MAP’ includes identifying specific actions required to achieve one of the goals listed in the ‘Compass’, identify barriers to that action, possible solutions, and aspects of social support and how the actions will be monitored. The protocols are deliberately colourful, simple and non-pathologising in contrast to standard medical record forms.

To a practicing coaching psychologist, working with individuals in life coaching, workplace or executive coaching, the implementation of the Camera, Compass, MAP is likely to appear straightforward. To implement these, however, in an inpatient mental health unit, with a long tradition of medical assumptions represents significant organisational change, requiring significant leadership. One key strategy has been the use of ‘parallel process’. This concept has been well established in supervision of psychotherapy (Grey & Fiscalini, 1987; McNeill & Worthen, 1989; Miller & Twomey, 1999). Originally, the key idea was that processes occurring between a therapist and client were likely to be mirrored, often unconsciously between the supervisor and the therapist. In our view, as CRM is a coaching model, we believe that many of the issues that staff report with consumers, become reflected in how they related with their own coaches or supervisors, and indeed in their sense of hopefulness, growth orientation, motivation and sense of empowerment. Moreover, in such settings, patients and staff may still carry

Table 2: Training and Coaching Competencies for the Collaborative Recovery Model.

Module	Knowledge Domains	Protocol, Skills and Attitudes	Competency	Training Exercise	Staff Performance Management Indicators
Practitioner Recovery as an individual process (Guiding Principle 1)	Psychological recovery as a staged individual process involving: (i) hope; (ii) meaning; (iii) identity; (iv) responsibility. The 'system of recovery' concept. The 'focus of recovery' concept.	Protocol: Short interview Stages of Recovery (SISTR). Skill: To explain the stages of recovery to a mental health consumer. Attitude: A 'growth mindset' – hopefulness towards consumers' ability to set, pursue and attain personally valued life goals.	Employs the principle, in all interactions and across all protocols, that psychological recovery from mental illness is an individualised process.	Role play in pairs involving: (a) use of SISTR as means to planning; (b) Explanation and clarification to consumer and carer in understandable language of: – stages of psychological recovery – focus of recovery – system of recovery.	<ul style="list-style-type: none"> ● Document trail of completed SISTR. ● Consumer report of explanation of recovery from staff. ● Staff reports of consumer behaviours (e.g. Consumer Evaluation of Collaborative Recovery Model, Recovery Self-Assessment).
Collaboration and autonomy support (Guiding Principle 2)	Working alliance. Power and empowerment. Relationship rupture. Autonomy support. Barriers to collaboration. Working with relationship dynamics.	Skill: Develop and maintain a working alliance. Attitude: Positive towards genuine collaboration.	Employs the principle, in all interactions and across all protocols, of maximum collaboration and support of consumer autonomy.	Role play in pairs involving the explanation and clarification to consumer and carer in understandable language the meaning of: – a collaborative relationship – overcoming relationship ruptures.	<ul style="list-style-type: none"> ● Consumer Rating of Working Alliance Inventory (or similar). ● Consumer reports of staff behaviours (e.g. Consumer Evaluation of Collaborative Recovery Model, Recovery Self-Assessment).
Change Enhancement (Component 1)	Stage of psychological recovery. Decisional balance. Motivational readiness and resistance. Psychological and basic needs. Negotiated needs. Importance and confidence. Fixed versus Growth Mindset.	Protocol: Motivational interviewing, particularly decisional balance. Skill: Use decisional balance techniques appropriate to assist consumer to clarify ambivalence regarding change.	Enhances consumer change by skillful and use of motivational enhancement appropriate to the stage of recovery of the consumer.	Role play in pairs to conduct a decisional balance exploration, focussing on whether to work towards recovery or not, and other conflicting motivations- eliciting something in each quadrant that includes functional and significant other costs or benefits.	<ul style="list-style-type: none"> ● Document trail of completed decisional balance protocols.

Table 2: Training and Coaching Competencies for the Collaborative Recovery Model (continued).

Module	Knowledge Domains	Protocol, Skills and Attitudes	Competency	Training Exercise	Staff Performance Management Indicators
Collaborative values and strengths identification (Component 2)	Values clarification. Strengths identification.	Attitude: To take partial responsibility for role in interactional aspects of motivation. Protocol: 'Camera' values and strengths clarification method. Skill: Assist a consumer to elicit personal values and strengths and assess how well they have been implemented recently. Attitude: To value reflective exercises notwithstanding current difficulties or symptoms.	Assisting consumers to clarify values and strengths and then utilise them in the here and now.	Role play in pairs on assisting a consumer to use the Camera – following all steps.	<ul style="list-style-type: none"> Document trail of completed Camera protocols.
Collaborative life visioning and goal striving (Component 3)	Personal life vision. Valued directions. Goal identification, setting and striving. Meaning/manageability trade-off. Autonomous goals. Prevention and Promotion goals. Proximal and distal goals.	Protocol: 'Compass' vision and goal striving method. Skill: Elicit meaningful vision and manageable goals. Attitude: To be persistent within the face of obstacles.	Persists flexibly and collaboratively with the Compass within the development of an integrated meaningful live vision, valued directions, manageable goals, which provide a broader purpose for actions.	Role play in pairs on assisting a consumer to use the Compass – following all steps.	<ul style="list-style-type: none"> Document trail of completed Compass protocols. Team-based performance assessed by Goal-IO audit of files to examine quality of goals documented in case notes.
Collaborative action planning and monitoring (Component 4)	Health behaviour change. Action planning. Homework. Self-efficacy. Monitoring. Self-management.	Protocol: 'MAP' action planning method. Skill: To assist with the development of comprehensive action plans.	Systematically and collaboratively assigns actions, and monitors progress toward action completion and goals, to enhance self-efficacy of consumer.	Role play in pairs on assisting a consumer to use the MAP – following all steps.	<ul style="list-style-type: none"> Document trail of completed MAP protocols.

Table 2: Training and Coaching Competencies for the Collaborative Recovery Model (continued).

Module	Knowledge Domains	Protocol, Skills and Attitudes	Competency	Training Exercise	Staff Performance Management Indicators
Collaborative Recovery Champion					
Promoting Recovery	Recovery oriented care. Consumer participation movement.	Attitude: To value 'small actions' between the meetings of staff and consumers (between session activity). Skill: To promote a 'growth mindset' towards human development. Attitude: To possess a 'growth mindset' towards human development.	Maintaining a positive and hopeful approach to the philosophy of recovery oriented care despite: (a) criticism that it is overly optimistic; (b) that it will not work in a particular unit because consumers are 'too sick'.	To role play a situation with sceptical colleagues regarding opposition to recovery oriented care that it is: (a) a 'fad'; (b) 'pollyannaish'; (c) providing false hope – and demonstrate reflective listening and a positive statements, use motivational enhancement strategies.	<ul style="list-style-type: none"> • Demonstrated partnership with consumer/patient advocacy groups regarding recovery oriented care delivery. • Reflective Journal documenting times when individual 'spoke up to promote a growth mindset'.
Training Recovery	Transfer of training. Experiential Learning Theory. Basic group facilitation.	Skill: To communicate the principles and related practices of recovery to mental health workers in a manner understandable to them. Attitude: To view adult learning as mutual sharing of ideas.	To be able to communicate the key aspects of the recovery philosophy and its implications for consumers, carers, mental health workers and organisations.	To run a group training session with colleagues – and provide a video sample within coaching with self-evaluation from coachee.	<ul style="list-style-type: none"> • Number of training hours conducted. • Participant evaluation of training.
Coaching Recovery	Evidence based coaching. GROW model of coaching. Parallel Process.	Skill: To assist colleagues past 'stuck points' in recovery oriented practice in short meetings. Attitude: To value the autonomy of the coachee.	To assist colleagues in their personal and professional development in a manner consistent with working with a consumer.	To conduct coaching sessions with colleagues and receive feedback, self evaluation and to modify based on feedback.	<ul style="list-style-type: none"> • Willingness to complete personal Camera, Compass, IMAP. • Measure of 'coaching alliance' rated by coachee.

Figure 1: Camera, Compass and MAP Coaching protocols within CRM.



internalised stigma regarding mental illness; closely related to the fixed mindsets already discussed.

The parallel process strategy being used with CRM is for staff to use the Camera, Compass and MAP as part of their own professional development coaching – exactly the same protocols that they are asked to use with mental health consumers. This is the use of leadership coaching principles with self and with patients leading from the inside-out (Bianco-Mathis, Nabors & Roman, 2002). Bianco-Mathis et al. (2002) describe a coaching leadership model that includes ‘Coaching the Leader Within’ – coaching a leader on the alignment of who and what he/she is and wants to be ‘Coaching the Leader with Others’ – the leader in relationship with others; and ‘Coaching the Leader with the Organization’ – coaching the leader to lead change and transform the organization. This leadership coaching framework fits closely with the use of CRM with staff and patients at the mental health organisation to be described further.

There is an implicit normalising rationale here that staff and patients all have strengths, values, goals, actions, and require a growth mindset. This is significantly different from historical paternalistic assumptions of psychiatric care. Couley and Oades (2007) have described how many mental health teams feel that they are also in recovery, searching for a growth focus. This difference represents the leadership challenge to implement recovery oriented care. This is now discussed.

Developing recovery oriented care: Leadership coaching for transformation

Davidson et al. (2006) have described the top 10 concerns about recovery in mental health services, with the first concern being that recovery oriented care increases exposure to risk and liability. Further concerns include a perception that it may devalue professional expertise, and increase the need for resources. In addition to issues

related to recovery specifically, there is the general challenge of implementing change – particularly the transfer of training problem. The transfer of training problem is well established, and becomes more difficult with complex interpersonal skills, as required in service industries such as mental health systems (Gist, Stevens & Bavetta, 1991). There are multiple challenges to transferring evidence-based recovery practices into routine practice and we found that mental health workers endorse institutional constraints as the most frequent barriers to transfer of the CRM training into practice (Deane et al., 2006; Uppal et al., in press). Institutional constraints include elements such as insufficient staff (e.g. ongoing recruitment and training) and positive reinforcement for patients, restrictive administrative practices, inadequate resources and funding, poor data management, and poor alignment of organizational values/goals to staff training. It has been consistently reported that training transfer and diffusion of innovation are significantly influenced by these elements (e.g. Rogers, 2003; Turner & Sanders, 2006).

We have observed many instances where there is strong managerial and organisational support for recovery oriented practices, yet clinicians have still not implemented skills in practice. If institutional constraint barriers are not the main factor preventing transfer of training, it may be philosophical or attitudinal opposition of staff toward practice change. The top 10 concerns encountered in implementing recovery-oriented care include potential challenges to the beliefs and philosophical orientation of staff (Davidson, 2006). For example, recovery philosophy encourages increased self-management and autonomy amongst patients. This raises concerns amongst mental health workers that recovery increases risk-taking by patients and exposes providers to risk and liability. Since traditional care models tend to be predominantly risk averse, it is possible that this philosophy may be a barrier to implementa-

tion. Alternatively, it has the potential to be a facilitator for those staff with whom it resonates. Many mental health staff report recovery-oriented values, but based on previous evidence, the transfer of recovery-based training into clinical behaviour has been poor.

In the same way that personal recovery research and practice may be informed by positive psychology principles, the discipline of positive organisational scholarship (Cameron, Dutton & Quinn, 2003) and specifically positive leadership (Cameron, 2008) provide useful frameworks to understand the organisational challenges in developing recovery oriented mental health services. Positive leadership emphasises the need for positive climate, positive relationships, positive communication and positive meaning. For this reason, the implementation of a strengths-based coaching model (Collaborative Recovery Model), in parallel for staff and patients is consistent with the positive leadership model. The mental health organisation in Ontario, Canada, and this implementation process is now described.

The mental health organisation is a large tertiary inpatient mental health facility in Ontario, servicing approximately 330 adolescent, adult and elderly inpatients and over 440 outpatients with enduring mental illness, particularly schizophrenia spectrum disorders. The organisation employs 1200 staff, with 700 clinical staff including nurses, occupational therapists, psychiatrists, psychologists, recreational therapists, service providers who have been patients and social workers. The 500 non-clinical staff including house-keeping, maintenance and administration.

In November, 2008, the organisation embarked on a new initiative, 'Recovery and Rediscover – the Shared Journey'. Consistent with the parallel process of growth described, the staff professional development training and coaching ('rediscovery') is being run directly alongside changes to the service delivery model (i.e. to be recovery focussed). The positive leadership

involves a commitment to training all 1200 staff in the principles of the Collaborative Recovery Model, including growth mindset, hope, etc. This educational initiative was officially launched in January of 2009 and will be implemented throughout the hospital over the next 18 months, bringing patients, clinical and non-clinical towards a common desired goal: a recovery-based organization. All clinical staff will receive a five-day training module followed by ongoing workplace coaching. The practice model for patients will mirror this coaching through the use of the CRM. Recovery champions were nominated from each unit, and have received the training and coaching described in Table 2 and the protocols illustrated in Figure 1.

In addition to the CRM being a coaching model used in parallel, within the organisation there is a clinical coaching role which will provide support for clinical practice as inter-professional teams work to integrate the recovery philosophy into the everyday care that they provide. Historically, mental health clinicians have felt undervalued regarding the highly specialized care and skill set needed to work with patients with mental illnesses. As staff continue to work in environments with increasingly people who have acute illness, staffing issues, unpredictable and potentially volatile situations, the opportunity for positive and transformational leadership is crucial. Change agents (such as an Advanced Practice Nurse/Clinical Coach or a Recovery Champion) influence practice and collaboration through direct relationships with patients and through supportive and consultative roles with staff. These individuals are all acting explicitly as leadership coaches, whilst all staff and patients are encouraged to employ the principles of coaching psychology, and lead themselves.

Broader organisational initiatives have also included changing policy documents to reflect the positive growth recovery language, including recovery based metrics into balanced scorecard reporting, changing

electronic documentation to reflect the model. Staff incentives and recruitment are also currently being examined to explore their congruence with the recovery and growth orientation. The patient advocacy groups are also being supported to interpret and implement the programme.

The implementation of the programme is being evaluated over an 18-month period with a repeated measures design, focussing initially on staff outcomes, to be followed by examination of patient outcomes and satisfaction.

Conclusion

The principles and practices of coaching psychology, particularly leadership coaching, combined with those of positive leadership can have important applications, including environments that would be stereotypically thought of as clinical and not growth oriented, namely tertiary inpatient mental health units. This paper has described how coaching psychology, positive psychology and positive leadership can be combined with an emerging movement in mental health service provision, the recovery movement. The application in this environment rejects any assertion that coaching psychology or positive psychology only applies to 'non-clinical' populations, claiming rather that they represent a collection of attitudes, concepts and practices that value growth.

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Strengths coaching with leaders

P. Alex Linley, Linda Woolston & Robert Biswas-Diener

Positive psychology and coaching psychology share a number of common themes and fundamental assumptions. Blending positive psychology, strengths approaches and coaching psychology, our work in strengths coaching with leaders enhances both leadership and organisational capability. In this article, we explore the role of leaders as climate engineers and provide a brief history of strengths approaches, together with definitions of what we mean by strengths and strengths coaching, and how we use these in practice. We introduce the integrative Realise2 model of strengths and weaknesses which distinguishes between the six areas of realised strengths, unrealised strengths, regular learned behaviours, infrequent learned behaviours, exposed weaknesses, and unexposed weaknesses, before going on to demonstrate how leaders can make weaknesses irrelevant through role shaping, complementary partnering, strengths-based team-working or personal development. We examine the golden mean of strengths use, looking at strengths both overplayed and underplayed, before concluding with a view on the benefits of strengths coaching for both leadership and organisational capability. The Appendix provides 10 summary points in a strengths coaching checklist for leaders.

Keywords: Coaching, strengths, leadership, organisations, positive psychology.

POSITIVE PSYCHOLOGY and coaching psychology share much of a common heritage, in that they have both developed in response to the status quo of the field, which was deficit-based, pathology-focused, and driven by fundamental assumptions about human nature that were less than positive, to put it mildly. In contrast, positive psychology and coaching psychology are abundance-based, solution-focused and driven (typically) by fundamental assumptions about human nature which hold that people have within them a natural tendency to want to grow and develop their potential, and when their environment supports them in doing so, they thrive (Linley & Harrington, 2005).

This shift in emphasis and assumption has led many practitioners of positive psychology and coaching psychology to operate in ways different to traditional approaches to leadership and organisational capability development (see, for example, Biswas-Diener & Dean, 2007; Linley & Harrington, 2006). In this article, we will show how we have blended positive psychology, strengths approaches, and coaching psychology to develop leadership

strengths coaching programmes and practices that are focused on developing senior leaders and enhancing the organisational capability of the corporations that employ them.

We begin our article by introducing some of the history of strengths approaches in management and organisations, before going on to look specifically at how this has provided the foundation for our current work in strengths coaching for leaders. Having provided the background for our approach, we then describe some of our key practices, illustrating them with a number of short composite case examples, demonstrating the effects that they have had on our leadership clients and their organisations. To begin, though, we focus on one specific element of the leadership challenge where coaching psychologists can have a significant impact: leaders as climate engineers.

Leaders as climate engineers

Leaders have a unique role in organisations. Not only do they have operational requirements to deliver (as does any employee), but they also have strategic direction to set and people to manage (amongst many other

things!). But one of the leadership roles and requirements that is often not recognised, let alone understood or developed in leaders, is their position as what might be called ‘climate engineers.’ Simply put, how leaders operate, what they pay attention to, how they respond to challenges and opportunities – in short, their attitudes and their behaviours – combine to hold great sway over the psychological climate that exists within the organisation (Hogan, 2007; Naumann & Bennett, 2000). This leadership shadow was recognised as long ago as the sixth century BCE, by the Chinese philosopher Lao Tsu (cited in O’Toole, 2008, p.70), who posited:

‘A great nation is like a great man:
When he makes a mistake, he realizes it.
Having realized it, he admits it.
Having admitted it, he corrects it.
He considers those who point out his faults.
As his most benevolent teachers.
He thinks of his enemy as the shadow
that he himself casts.’

Recognising this, we contend that leaders have a seminal role in creating a strengths culture in their organisations, and it is to this that much of our strengths coaching interventions have been targeted. These interventions have typically had a dual focus that is characteristic of strengths coaching (see below). First, the strengths coaching has focused on enabling leaders to recognise, identify and develop strengths in themselves and others. Second, it has focused on enabling leaders to enhance organisational capability through strengthspotting in their team and down their reporting line, and then allocating people and resources according to individual and collective strengths as they go about building strengths-based organisations more broadly.

Harnessing strengths at work makes sound business sense: the Corporate Leadership Council (2002), in a study of 19,187 employees from 34 countries across seven industries and 29 countries, using standardized measures of individual performance,

found that managers who operated with a strengths emphasis unlocked 36.4 per cent higher performance from their employees, whereas managers with a weakness emphasis unwittingly contrived to reduce their employees’ performance by 26.8 per cent. And in our own work with Norwich Union and BAE Systems, we have seen substantial business bottom-line benefits through the adoption of strengths approaches (Smedley, 2007; Stefanyszyn, 2007).

A brief early history of strengths approaches

Given the fanfare which is now starting to be accorded strengths-based ways of working, one could easily be forgiven for believing that strengths research and applications only began with the advent of positive psychology, or at least not before the pioneering work of Donald Clifton at The Gallup Organization – especially since in the last few years more than two million people have completed either the Clifton StrengthsFinder™ (www.strengthsfinder.com; Clifton & Anderson, 2002; Rath, 2007), the VIA Inventory of Strengths (www.viastrengths.org), developed by Peterson and Seligman (2004), or the Inspirational Leadership Tool (www.inspiredleadership.org.uk), developed by the British DTI (Department of Trade and Industry) and Caret, a management consultancy (see Morris & Garrett, in press). The Clifton StrengthsFinder™ and the Inspirational Leadership Tool use an ipsative approach to assess 34 and 18 strengths respectively, whereas the VIA Inventory of Strengths uses a normative approach to assess 24 character strengths (for the VIA-IS norm data for the UK population, see Linley et al., 2007). Both StrengthsFinder™ and the VIA Inventory of Strengths typically report back one’s ‘top five’ strengths, whereas the Inspirational Leadership Tool reports back on all 18 characteristics.

Notwithstanding this recent growth of interest, strengths approaches have existed explicitly in the management literature for more than 60 years, beginning – as far as our

historical researches have been able to establish so far – with the seminal work of Bernard Haldane (1911–2002), who went on to become a legendary figure in career development circles, but sadly (at least as far as we have been able to establish), largely unknown and unacknowledged by later strengths and positive psychology researchers.

Writing in the *Harvard Business Review* in 1947, Haldane set out what he believed to be the core reason for people's lack of efficiency at work – which was that senior management and leadership were not sufficiently well equipped to identify the strengths, talents and aptitudes of their people:

'One of the reasons for this neglect and waste of manpower is that very few top-management men know and recognise the varieties and number of human aptitudes. Another is general lack of information on how these aptitudes combine to form personality and work patterns. A third reason is a failure to realise the results of misapplication or neglect of talents.' (Haldane, 1947, p.652).

Some 20 years after Haldane – but still over 40 years ago from today – Peter Drucker (1909–2005) picked up on this theme, positing that 'the unique purpose of organization is to make strength productive' (Drucker, 1967, p.60). Organisations were formed, Drucker contended, in order to make the whole more productive and valuable than the sum of its parts – by identifying and combining the strengths of different individuals in a way that made their weaknesses irrelevant:

'[Making] strength productive...cannot, of course, overcome the weaknesses with which each of us is so abundantly endowed. But it can make them irrelevant.'

Building on these illustrious forefathers, our work on strengths at the Centre for Applied Positive Psychology has been developing over the last decade, and it is to a closer

exploration of strengths and strengths coaching in practice that we now turn, including a specific focus on how we build on Drucker's advice about using strengths to make weaknesses irrelevant – a concept we have developed through CAPP's Realise2 model, which goes beyond traditional strengths *identification* approaches, to differentiate between each of realised and unrealised strengths, regular and infrequent learned behaviours, and exposed and unexposed weaknesses, while also providing methodologies for the *applications* of strengths in a range of settings.

Defining strengths and strengths coaching

When working with strengths and strengths coaching, it is important to be clear what one is talking about, and what we mean by strengths. We define a strength as a 'a pre-existing capacity for a particular way of behaving, thinking, or feeling that is authentic and energising to the user, and enables optimal functioning, development and performance' (Linley, 2008, p.9). As our previous research and applications have demonstrated, people who use their strengths more are happier and more fulfilled, and feel as if they have more energy available to them (Govindji & Linley, 2007), they achieve their goals more effectively (Linley, 2003, 2008), they are more engaged (Harter, Schmidt & Hayes, 2002), and they perform better at work (Smedley, 2007; Stefanyszyn, 2007; Woolston & Linley, 2008). It is for all of these reasons that we promote strengths coaching as an effective, value-adding organisational intervention, and why Linley (2008, p.47) went so far as to propose that '*realising our strengths is the smallest thing we can do to make the biggest difference.*'

Our work on strengths coaching has similarly evolved in the context of our wider applications of positive psychology and strengths with organisations and individuals. Writing in the *Encyclopaedia of Positive Psychology*, Dominic Carter and Nicky Page (in press), noted how strengths coaching

could be understood both as an *approach* and as an *outcome*, describing it as being:

‘concerned with facilitating the identification, use and development of strengths to enable optimal functioning, performance and development. It may be understood as an approach to coaching, where the focus is on achieving other goals through harnessing strengths, or it may be understood as an outcome of coaching, where the intention is for the coaching client to gain a better understanding of their strengths, or to develop particular strengths more fully. Most often, strengths coaching is a combination of both of these.’

An integrative understanding of strengths and weaknesses:

The Realise2 model

One of the key ways in which we work with strengths in our leadership coaching is through the use of CAPP’s Realise2 model, which distinguishes between realised strengths, unrealised strengths, regular learned behaviours, infrequent learned behaviours, exposed weaknesses and unexposed weaknesses (see www.realise2.com).

Realised strengths are those strengths that you recognise and use regularly – but there can still be surprises here, in that there may be many things we have as strengths, but which we don’t automatically recognise and accept as such (Kaplan, 1999). *Unrealised strengths* are those strengths that may be lying dormant in us, waiting for the opportunity to arise or for the right situation to call them forth (Lyons & Linley, 2008).

Regular learned behaviours are those activities that we do often and at which we may be very good, but which are not energising for us. Regular learned behaviours can present a real psychological trap of which we need to be aware, since we can do things regularly – and be asked to do them more – because we are good at doing them, yet to do so repeatedly over time would lead to an increasing sense of feeling disenfranchised and disengaged, because the critical

energising component is missing. *Infrequent learned behaviours* follow exactly the same pattern, with the exception that they are behaviours practiced less frequently and so – as long as they remain practiced infrequently – present a lesser risk to our psychological health and well-being.

Exposed weaknesses are those weaknesses that are out in the open and causing you problems. As we go on to explore below, these are the weaknesses that need to be most effectively managed to make them irrelevant. *Unexposed weaknesses* are those weaknesses that could trip you if the situation or context changed, but at the moment that are safely irrelevant to what you need to deliver. As long as they are kept that way, they can be safely ignored. But if the situation changes and they are pushed into the foreground (becoming exposed weaknesses) then they will need to be managed quickly and effectively if performance is not to be undermined – all of which provides fertile ground on which to work for the strengths coach.

With our coaching clients, we have found that this more comprehensive positioning of strengths, learned behaviours and weaknesses is well-received by senior leaders, who typically are fairly self-aware and have experienced a variety of psychometric personality assessments in the past as they have progressed up the leadership ladder, and as a result of which are familiar with a lot of what traditional assessment approaches can reveal to them. In contrast, the Realise2 approach provides a more holistic framework and tool for the identification, assessment and development of strengths, together with the identification, assessment and management of both learned behaviours and weaknesses.

The fact that we don’t automatically gloss over weaknesses by calling them ‘development areas,’ but instead tackle them head on as weaknesses, as well as dealing with the traditionally confusing anomaly of learned behaviours (we’re good at doing it but don’t enjoy it and aren’t energised by it), leads to a franker and more authentic conversation

with our clients, and one that is perfectly suited to coaching scenarios. Talking about weaknesses as weaknesses, and labelling them as such, enables a much more honest and open acceptance and ownership of the problem area, rendering it much more pliable through the weakness management interventions that we then work through with our senior leader coaching clients.

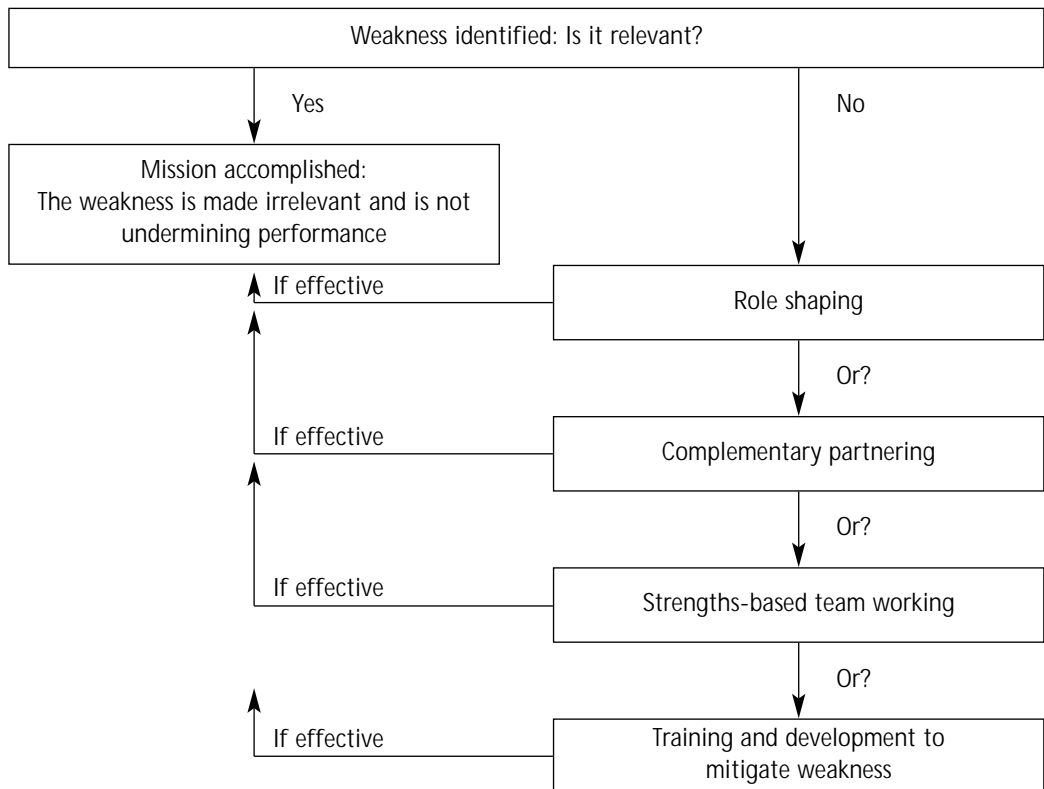
Building on the advice of Goffee and Jones (2006), we are very explicit in our work that leaders should be able to reveal weaknesses – appropriately – and then go on to make them irrelevant. By revealing weaknesses appropriately, leaders are exercising yet another example of their role as climate engineers. First, they are being authentic and setting a trend for honesty and openness

within their organisation, by which they enable and give others permission to do the same. Second, they are inviting help and support, since by acknowledging their own weaknesses and limitations, they are reaching out for others to step up and help them – a first step in complementary partnering or strengths-based teamworking as we go on to discuss below.

Making weaknesses irrelevant

Taking his lead from Drucker’s (1967) advice that one should focus on making weaknesses irrelevant, Linley (2008, p.171) sets out how to go about doing so, providing a framework that we have used to great effect in our strengths coaching with senior leaders (see Figure 1).

Figure 1: The Making Weaknesses Irrelevant Decision Tree.



Source: Linley, A. (2008). *Average to A+: Realising Strengths in Yourself and Others*. Coventry, UK: CAPP Press. Reproduced with permission of CAPP Press.

Case Study 1: Role shaping. First, one should examine the leader's role. Is this something that they absolutely have to do, or can the role be shaped and crafted in such a way that the weakness-inducing activity is made irrelevant? For example, one client found himself deeply de-energised by the number of management meetings that he found he was required to attend, with the attendant bureaucracy and loss of time on other activities. One of his key strengths lay in his capacity for deep thought and analysis when he was able to create the space and time to be on his own, since this then enabled him to step back and look objectively at the bigger picture.

In doing so, this client was able to see that the way in which various business units were being reviewed was ineffectual and inefficient, and to make recommendations for changes to the review process as a result. These recommendations were accepted and led to a significant reduction in the number of management meetings required. In turn, this led to substantial savings in time, both for those who would have attended the meetings and also for all those who would have been involved in preparing the financial and management data to be reviewed at the meetings.

The strengths coaching also enabled this client to see more clearly what he was good at – specifically, thinking and analysing – and to find more time to do this, while also identifying those things that de-energised him and creatively finding ways to delegate these activities to others. Through his strengths coaching, the client not only increased his own contribution through finding the time for effective thinking, but also increased the amount of productive, value-adding time for many of his colleagues, resulting in the saving of many 10s of person-days over the course of a year.

It is important to acknowledge that with senior leaders such as this one, role shaping is something that will happen almost naturally, through the combination of autonomy, discretion and attention. By autonomy, we

refer to the fact that leaders are largely in charge of their own destiny and direction – and further, that of the organisation as a whole. By discretion, we refer to the fact that leaders – much more than almost any other employees – are able to choose what they spend their time on. By attention, we refer to the fact that leaders are similarly able to decide where they focus their attention – and, critically, that attentional focus will almost always be according to where their strengths and natural preferences lay, notwithstanding a concerted (but de-energising) effort to deliver other necessary outcomes (that may be calling on learned behaviours and/or weaknesses).

Of course, it is probably utopian to believe that it is always possible for a person – even a senior leader – to design their work in such a way that they are *only* ever working from their strengths. This being so, is there anything that can be done to make working from weaknesses more effective and less draining? Unfortunately, there is no 'magic bullet' solution for circumstances such as this.

In practice, however, we have often taken one of two approaches. First, we explore if the activity can be recast or redesigned in a way that it is playing to a different strength or strengths that the person may have. If the leader is not good on detail, but has to spend time doing detailed checking that cannot be passed off to someone else, explore if there is a Persistence strength upon which they can call. Reframing something as requiring Persistence (a strength they have) versus Detail (a learned behaviour at best, a weakness at worst) can enable a subtle yet powerful psychological shift. As strengths coaches, we can be highly effective in helping our clients to reframe their activities in this way where it is possible for them to do so.

Second, if even these sleights of mind are not possible, we recommend that the weakness-inducing activity is buffered by other activities that will recharge one's energy and engagement. Doing something that is enjoyable and fulfilling either side of something that is draining and disengaging provides a

way to counteract the negative impact of having to work from our weaknesses. These activities and approaches, whether they involve shaping our role or buffering our weaknesses, are effective not only for individual leaders themselves, but also for those people around them. Ideally, we should seek to find ways in which the strengths of one person may be used to buffer the weaknesses of another, as we explore next in relation to complementary partnering.

Case Study 2: Complementary partnering.

Second, Linley (2008) suggested, one should look at the opportunity for complementary partnering in making weaknesses irrelevant. Directors and their PAs are often quintessential examples of complementary partnering, with many senior directors freely admitting – in private conversation at least! – that they would not know where to be, or what to do, without the steady, guiding hand of their PA to assist them.

One organisation with which we work had employed a superb negotiator and salesperson, but a superb negotiator and salesperson with a challenging flaw – he found it excruciating to complete the spreadsheets that were necessary to log and track his sales and negotiation activities. Many traditional organisations would have sent him on the requisite spreadsheet training course, with the attendant loss in motivation and morale as he worked through his spreadsheet issues. In contrast, this progressive organisation did quite the opposite. Recognising his value-add through sales and negotiation – this was the reason they had employed him – they simply hired an assistant who took care of the spreadsheets on his behalf, her strengths in Detail and Structure being used to complement his talent for sales and negotiation.

Far too often, organisations strive to create the mythical well-rounded individual who is good at everything, but serve only in crushing the potential brilliance of their leaders as they create stultifying mediocrity, while commending themselves on the fact that everyone has reached the minimum

required standard of the organisational competency framework. But at what price?

Coaches have an important role to play in helping senior leaders stand up against the march of mediocrity that competence frameworks have spawned, countering them through a recognition that spikes of brilliance deliver far more value than does a marginal performance increase from slightly less than average to average. In this way, they will be helping to play their part in shifting organisations from their deficit-focused mindset to one that is better characterised by the abundance approach that informs positive psychology and coaching psychology, and which proffers the potential to transform working life and organisational performance (Linley, Harrington & Page, in press).

Case Study 3: Strengths-based teamworking.

Third, taking complementary partnering a step further, its principles can be applied across an entire team – and as Drucker (1967, p.60) has argued, ‘to make strength productive is the unique purpose of organization’ – and, we extend, the unique purpose of teams. Working with senior leadership boards, we have been taking a strengths-based team coaching approach which we have evolved over the last three years. In essence, this involves ensuring a common understanding of strengths-based ways of working across the senior leadership team (SLT), identifying the strengths of that senior leadership team both as individuals and as a group, and then allocating roles and responsibilities according to those strengths. In an early assignment where we used this approach with BAE Systems, our intervention to identify the strengths of the SLT and then to allocate work according to those strengths led to significant advances in project delivery and the completion of a number of business-critical organisational change initiatives (see Smedley, 2007).

The team coaching intervention was focused very much on the enabling of strengths identification and recognition in individuals themselves as well as across the

wider team, and the creation of project pairings and teams according to strengths complementarities, leading to people working together who previously would not have done on a functional basis, but were now invited to do so on a strengths basis. On this basis, we were acting as what Clutterbuck (2007) would describe as an 'external team coach,' bringing a wider perspective to the process and interpersonal issues of the way in which the team could work together most effectively.

Fourth and finally in the 'Making Weaknesses Irrelevant' decision tree, Linley (2008, p.171; see Figure 1) recognises that there are some instances where none of these three strategies described so far can be applied. The role cannot be crafted differently, there is no one with whom one can partner, there is no wider team to share the burden – and still the weakness-inducing task must be overcome, the necessary output delivered. When this is the case, the coaching psychologist is presented with yet another opportunity to demonstrate the value of their practice, since when nothing else can make the weakness irrelevant, one is left with the need for training and development.

This training and development may take the form of coaching, skills training, behaviour modification, didactic instruction, or any number of other training and development interventions – but the essential point being to ensure that the weakness is developed so far as is necessary to make it irrelevant, such that it no longer undermines performance, rather than it being developed to the level of mastery that so many competency frameworks seem to demand, and which as such extract a heavy price from limited L&D budgets that would otherwise be better spent on turning good into brilliant through realising the strengths of the people and the organisation, rather than spending time fruitlessly on fixing weaknesses beyond the level to which they need to be fixed. Coaches and coaching psychologists can become powerful advocates of this new developmental focus in organisations,

that of achieving high performance through understanding what works and building on it, rather than focusing on weakness and forever trying to plug the gaps.

Strengths under-played and over-played: Finding the Golden Mean

Another recurrent theme in our strengths coaching with senior leaders – and a golden thread for the coach who is looking for a simple intervention that will have powerful developmental outcomes – is helping leaders to calibrate their readings of strengths in themselves, understanding more about strengths underplayed and strengths overplayed.

We have seen these themes in our work with so many leaders that we might hesitantly contend that – like the leader's role as climate engineer – they may constitute a major blind spot for the leader's otherwise vigilant eye. The evolution and development of leaders seems to render their vulnerability to strengths over- or under-played as almost inherent. Either leaders discount something they are good at because they simply don't recognise it in themselves, taking it for granted, or they take a strength too far because, thinking that this is what got them where they are today, they don't recognise the signals that the environment has changed and so need them. Essentially, as argued by Goffee and Jones (2006), leaders need to be excellent at situation sensing, knowing what is the right thing to do and when, a key part of which is ensuring the active calibration of their strengths.

'Versatile leadership' is the phrase used by Kaplan and Kaiser (2006) to convey this, making the case that we all tend to veer to one or other pole of any leadership dichotomy – with 'forceful-enabling' and 'strategic-operational' being the people and process parameters on which Kaplan and Kaiser focus. Quite simply, leaders who can do both – versatile leaders – perform much better than those who cannot – as the data show, leadership versatility predicts as much as 42 per cent of the variance in overall lead-

ership effectiveness (Kaiser, Lindberg & Craig, 2007).

Tracing this idea of optimal balance back to Aristotle (1998), Linley (2008, p. 70) introduced the idea of the ‘golden mean [of strengths use]: the right thing, to the right amount, in the right way, and at the right time.’ By helping leaders both to appreciate and to apply this golden mean, coaches and coaching psychologists are mining a rich seam of powerful leadership development that enjoys the beautiful asymmetry of a simple intervention with profound effects.

Case Study 4: Strengths over-played. One client with whom we have worked provides an example of how he was able both to dial back on a strength when he was taking it too far, and how he was able to dial up a strength when he recognised he could be doing more with it. This particular coaching client has strengths in Incisive and Questioner – amongst many others – but these combined mean that he asks great questions that drive right to the heart of the matter. In one instance, he was questioning a junior colleague about a sensitive issue, and recognised that he was at risk of probing too far. Remembering the dangers of strengths over-played, he dialled back and toned down his questioning, thereby achieving a positive outcome that would otherwise have been at risk.

In a contrasting example, working with a junior team as they grappled with a major systems problem, he was able to deploy his Questioner strength in tandem with his ability to solve problems, a strength we call Resolver. The result: an intervention with this junior team that not only solved the problem with which they were grappling, but in the process, he calculated, had saved the organisation more than £1,000,000 in costs (of course, this can only be his estimate, but it conveys the point) – and all as a consequence of his learning from coaching that sometimes one should ‘turn up’ a strength and do it more.

Case Study 5: Appropriate work allocation.

In another example of the valuable perspective that coaches can introduce through recognising strengths underplayed and over-played, a coaching client was helped to shift his traditional view of work allocation that things should be divided equally. Having a small and specialist team – of two people – this leader had always divided the work equally between them – the problem being, he recognised in retrospect, that he did so without consideration for what that work involved or what their aptitudes were [one is reminded, notwithstanding our great respect for this leader, of Haldane’s (1947) assessment about senior management and their (in)ability to identify the aptitudes of their people].

Through strengths coaching, his perspective and understanding shifted, such that he was able to develop a richer view of what was ‘fair’ in relation to work allocation, namely, first, that it was not unfair to allocate work differentially according to the strengths and abilities of different employees, and second, that it was entirely legitimate to ask a lot more from someone when they were operating from an area of strength. When people are working from their strengths, they are more energised and more effective, and so can be legitimately relied upon to achieve greater output than when they are being drained by working from their weaknesses.

Strengths Coaching: A powerful approach with value-adding outcomes

As we have demonstrated throughout this article, strengths coaching is both a powerful *approach* to coaching, whereby strengths are used more effectively in the attainment of goals, and a value-adding *outcome* of coaching, whereby the coaching is used to enable the realisation and development of an individual client’s strengths. Applied to senior leaders, strengths coaching can be used both to develop individual leadership effectiveness and to enhance wider organisational capability, the former through the realisation of individual leaders’ strengths,

and the latter through the identification and co-ordination of the strengths that exist throughout the organisation.

Given their unique role as organisational climate engineers, leaders have a tremendous power and a sobering responsibility for setting the corporate tone, establishing the 'way things are done around here.' As Ulrich (2008) contends for HR practitioners, we likewise believe that a core role of the coaching psychologist working in organisations can be 'to use their strengths to strengthen others' – particularly, we contend, the senior leadership population - who are then enabled to use their role as climate engineers positively and effectively in strengthening the organisation more broadly. By enabling leaders to realise strengths in themselves and others, strengths coaches can help leaders to unlock the best of what the people throughout the organisation have to offer, and thereby to guide the organisation to the higher plateaux of organisational performance to which all leaders aspire.

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Appendix: Strengths Coaching Checklist for Leaders

1. Act according to the golden mean of strengths use: do the right thing, to the right amount, in the right way, at the right time.
2. Use your strengths volume control to dial strengths up, or to dial them down, as the situation requires.
3. Hone your situation sensing skills, so that you know better when to do more and when to do less. Asking others and inviting feedback can be helpful here.
4. Reveal your weaknesses appropriately, because you then give others permission to do so, as well as extending an invitation to them to help you with yours.
5. Having revealed your weaknesses appropriately, work on making them irrelevant through role shaping, complementary partnering, strengths-based team working – or if really necessary – putting in the necessary hours and effort to develop yourself to the point of competence in your weak areas.
6. Play to people's strengths as a way of enabling you to manage their weaknesses and make them irrelevant. This applies to you as an individual, to your team and wider business unit, and to the organisation as a whole. What are your organisational strengths? How can you build on them to make your organisational weaknesses irrelevant?
7. Be mindful of where you apply yourself. Leaders enjoy the power of autonomy, discretion and attention, all of which will predispose you to spend your time using your strengths – great news for you, as long as it is also the right thing for the organisation.
8. Every day, be mindful of your leadership role as a climate engineer. Even without realising it, your actions, attitudes, and behaviours set the tone for 'the way things are around here.'
9. Leverage your leadership role as a climate engineer by becoming an expert strengthspotter – identifying and developing your own strengths, as well as those of your team and your wider organisation. Celebrate success while still dealing effectively with failure.
10. Enhance your organisational capability by ensuring the strategic alignment of strengths – in your employees, your teams and business units, your organisation as a whole – with your corporate goals. At what do your collective strengths enable you to be the best?

Using attachment theory in coaching leaders: The search for a coherent narrative

David B. Drake

Attachment theory is a well-established body of work in developmental psychology. In this article, I provide an overview of the key elements of the theory and demonstrate how it can be used in coaching leaders. In connecting the 'working models' they use as adults with the cognitive and interpersonal patterns they developed as children, attachment theory provides an important lens on development and change in leaders. Drawing from Bowlby's (1988) work and current neuroscience research, five strategies are offered on how to use attachment theory in coaching leaders. In particular, there is an emphasis on working with client stories and helping them develop greater narrative coherence in how they talk about and live their lives.

[It is] what Freud called the 'repetition compulsion,' the magnetic summons of an old wound in our lives that has so much energy, such a familiar script, and such a predictable outcome attached to it that we feel obliged to relive it or pass it on to our children. (Hollis, 2005, p.81)

COACHES routinely encounter vestiges of long-held patterns that continue to echo across their client's stories and lives. In tracking these patterns, coaches are looking for the ways in which clients are living the same 'story' over and over again; e.g. remaining stuck in the same role or response in the belief that – this time – it will get them the connection and confidence they have been seeking. It is not about the past, though, as much as about appreciating the long arc of change in adults. A key role for coaches is to provide a safe space in which clients can be witnessed for more of who they are, experience themselves at their best, and learn new ways of seeing themselves and relating to others. I have found my study of attachment theory very helpful in deepening my narrative approaches to coaching and developing leaders.

Attachment theory is based on the study of the patterns of connection and communication between parents (or other primary caregivers) and infants and how they shape the latter's cognitive, emotional and social development (Ainsworth & Bowlby, 1991; Bowlby, 1973, 1969/1982). Infants' devel-

oping brains instinctively drive them to seek physical closeness and resonant communication with the people closest to them, usually beginning with the mother. The adaptive patterns that are established early on based on the responses an infant experiences shape the unique ways in which his/her parasympathetic nervous system moderates the once dominant sympathetic nervous systems' drive to reach out and connect (Badenoch, 2008).

Attachment theory helps us understand the cognitive schemas, somatic reactions, behavioural preferences and narrative patterns that children carry into adulthood as a result, in part, of what happens in response to these primal drives. In doing so, the case is made for a correlation between patterns of response in our early relationships, patterns of narration in our development of identity, and patterns of engagement (or not) in our relations with others. In particular, attachment patterns reflect people's tendencies, particularly under stress or perceived threat, to move closer or farther away from others. Karen Horney's (1945) work on the origins of

neurosis in children supports this thesis in seeing attachment-related challenges as emerging from frustrations in trying to fulfill the needs for both safety and self-expression. In time, young children's *ad hoc* strategies often become cognitive schemas, character traits, and behavioural patterns. As a result, coaching adults involves helping them resolve any of their subsequent 'divided wishes' (Horney, 1945) so they can invest wholeheartedly and authentically in their life and work.

This paper takes a look at how coaches can use attachment theory in their work. It provides a brief overview of attachment theory, the patterns of attachment, the benefits of secure attachment, and some strategies for coaching leaders from an attachment frame. In particular, we will look at the role of narrative coherence in both development and in coaching leaders.

The narrative and behavioural patterns that appear in a leader's life and work are quite often vestiges of patterns of attachment from childhood. As leadership is increasingly seen as relational, contextual, and interdependent in nature, attachment theory provides an important frame for recognizing patterns in their ways of engaging with others. Without venturing too far into a more purely psychotherapeutic space, qualified coaches can certainly use their understanding of attachment theory to guide their interventions with clients.

A narrative approach works particularly well along these lines as a result of the strong connections between schemas, stories and behaviours. Clients' stories can be explored as indicators of their attachment preferences and their subsequent needs for development. For example, a coach may find that beneath a client's stories of his great accomplishments lies a fixation on past events to avoid present relational demands and a great fear of relying on others for help that is hindering the leader's further advancement. The goal for coaches is to help leaders develop a secure sense of attachment that would yield more coherent narratives about

the past, present and future and enable leaders to be more resilient, flexible and empathic. These are critical attributes in leaders, particularly in these challenging times.

What is attachment theory?

Siegel (1999) defines attachment as 'an inborn system in the brain that evolves [largely in the first two years of a child's life] in ways that influence and organize motivational, emotional, and memory processes with respect to significant caregiving figures' (p.67). Being able to freely express their emotional state and have others perceive and appropriately respond is vitally important for the development of an infant's brain and the growth in their ability to regulate their internal states, attune and adapt to various environments, and communicate about and influence their external states (Siegel, 1999). Attachment theory speaks to what happens for infants – emotionally, cognitively and socially – as a result of their early experiences in seeking to reach out for and connect with significant others (particularly the mother). In this process, the development of a felt and stable sense of a *safe haven* and a *secure base* are critical for the development of a secure attachment in children (Bowlby, 1969/1982, 1988).

Safe haven

The sense of a *safe haven* results from the proximity of and access to a trusted caregiver when the child feels anxious or senses danger. One of the key ways in which young children develop a sense of a safe haven, form attachment bonds, and increase their range of tolerable distance, is through what is called, 'contingent communication.' This mutual sharing of non-verbal signals and mutual influence through their interactions creates a sense of emotional attunement and mental state resonance and forms the basis for healthy, secure attachment (Siegel, 1999). Over time, this attuned communication enables the child to 'develop the regulatory circuits in the brain that give the

individual a source of resilience as he or she grows ... and the capacity for engagement with others in empathetic relationships' (Siegel, 2007, p.27). When feeling threatened, people engage in adaptive mental and physical responses they believe are necessary to manage internal and external demands and feel safe. A reinforcing loop is formed in which the degree to which there is a sense of a reliable safe haven affects the perceptions of 'demands' and 'threats and one's abilities to meet one's needs' which in turn reinforces one's current sense of safety.

Secure base

The presence of a sufficient safe haven provides a child with a sense of a secure base from which to increasingly and confidently explore the world – and to which he or she can return as needed as part of ever-widening circles. This is important for development because, as researchers have noted, the more threatened an individual feels, 'the more 'primitive' (or regressed) becomes the style of thinking and behaving' (Perry et al., 1995, p.274). A secure base reassures the child's need for 'familiarity-preserving, stress-reducing behaviours [and emboldens the child's need for] exploratory and information-seeking behaviours' (Mikulincer & Shaver, 2007, p.16). The strength that comes from having a reliable and resonant secure base enables children to feel both internally integrated and interpersonally connected to others as they move out into the world (Siegel & Hartzell, 2003).

Working models

As children grow, they begin to rely less on external figures for safety and more on the repeated experiences they have encoded in their implicit memory as 'working models' (Bowlby, 1988), the mental models of attachment they will increasingly carry within themselves. The early somatic experiences become cognitive structures reinforced through the narrative identities that form in our first relationships and shape the way we see and process our world. These models are

especially activated (and made visible) when we need to provide or receive support. If there is not an internalized sense of secure attachment, a person's engrained response may lead them to seek or avoid proximity (or some chaotic state in between) as part of a long-ago set of strategies for coping with incomplete attachment.

These schemas are especially apparent under stress because of their central role in affect regulation (Cozolino, 2006) and may result in the use of secondary strategies (hyperactivation, deactivation, or both) if the primary one (proximity seeking) is not effective. For example, they may cling to the parent – and subsequently other authority figures later in life – rather than face the separation distress necessary for the development of a healthy ego. Much of what we see as defensive or resistant behaviour is better viewed as a suboptimal attempt to get legitimate needs met. A reliance on secondary defensive strategies is required when a person is unable to build the secure foundation necessary to be clearly mindful of internal and external events (Mikulincer & Shaver, 2007). Coaching provides an opportunity for adults to surface, examine and adjust their often taken-for-granted models in order to increase their capacity for intimacy, authenticity, maturity and mindful choice.

Patterns of attachment

From the initial experiments (see Ainsworth & Bowlby, 1991) involving the observations of reunions of children with their mother, four primary patterns of attachment were identified: *secure* (about 70 per cent in the original studies), and three insecure patterns – *avoidant*, *anxious*, and *disorganized* (Siegel & Hartzell, 2003). Research by Mary Main indicated that about 85 per cent of the time there was a correlation between these four categories of the children's reunion behaviour and the attachment styles of their mothers (see Hesse, 1999). These findings make sense in the light of our growing understanding from the neurosciences about the vital role of approach patterns and

resonance between parent and child in shaping the structure of developing brains (Siegel, 1999).

The four patterns have held up well across decades of subsequent research and are described briefly below.

- Children who were seen as *secure* generally had mothers who rated as free and autonomous, emotionally available, and perceptive of and responsive to the child's needs, states and signals. A securely attached child feels safe, understood and confident that most of the time the parent is a reliable source of nurture, protection and meeting their needs (Siegel, 1999).
- Children who were seen as *avoidant* in their attachment generally had caregivers who were dismissing; emotionally unavailable, imperceptive and/or unresponsive; and perhaps even rejecting of attempts at proximity. As a result, these children tended to avoid dependence by pursuing self-reliance, avoid discomfort with closeness and, therefore, preserve distance, and avoid their needs by using deactivating strategies (Mikulincer & Shaver, 2007).
- Children who were seen as *anxious* generally had caregivers who were preoccupied; inconsistently available, perceptive, and responsive; enmeshed and entangled; and frequently imposing their state. As a result, these children tended to manage their uncertainty about independence by pursuing closeness and protection, and manage their anxiety about the availability of and their intrinsic value to significant others by using hyperactivating strategies (Mikulincer & Shaver, 2007).
- Children who were seen as *disorganized* generally had caregivers who were frightening and frightened, disorienting, and alarming. As a result, these children tended to simultaneously approach the caregiver for security and avoid her for safety, resulting in a conflicted, and even dissociated, state (Cozolino, 2006; Siegel

2007). Fortunately, this is the least common attachment pattern.

It can be useful in coaching to use these four attachment patterns as a way to understand leaders' cognitive and interpersonal responses – both in the session and at home/work. While many leaders have softened the rougher edges of an insecure attachment, their habitual but less-functional responses often have roots in the compensatory strategies they developed as children. For example, in my work teaching leaders how to coach their peers and staff, people with avoidant attachment issues often have difficulty asking emotive questions in coaching others out of a fear that they will be unable to adequately handle the imagined responses. They are already primed for the need to deactivate and, as a result, will often unconsciously steer their coaching conversations away from difficult or sensitive topics that may threaten their equilibrium. In these situations, I work to expand the emotional range in our conversations so as to increase their ability to feel secure in conversations with others. Coaches can help these leaders reframe their internal dialogue, attune with their somatic states, and learn new skills in interacting with others in order to move toward a greater sense of 'earned security.'

Attachment in adulthood

Although attachment processes are most evident in children given their underdeveloped defenses, adults continue to employ their initial schemas in varying degrees based on their sense of internalized security. In part this is because these adopted patterns often impact the affective styles, narrative themes, and patterns of engagement in interpersonal relationships (Siegel, 2007). However, rather than seeing these connections in linear, causal terms, coaches can work dynamically with clients' stories as a tableau of elements of their past and future at play in their present.

In doing so, coaches can draw out stories that are illustrative of (or reactivate) a leader's dominant attachment strategies so

as to provide opportunities for the development of new strategies that are more conducive to their development and well-being. For example, I worked with a marketing executive who realized that he kept finding himself in roles where he would be drawn into conflicts between a senior leader and his team. His growing resentment at taking on this role led to a realization that it also served as a means to manage his own anxieties – as this behaviour had done for him in his own family of origin. As part of my own work as his coach, I recognized that it was a pattern that was familiar in my own life.

Benefits of a secure attachment

Attachment theory suggests that the more effective people are in regulating, communicating and leveraging their inner state to remain connected and agentic in their outer world, the more able they are to be a good leader. With a secure sense of attachment and coherence in their life stories – whether it is continuous from childhood or earned in adulthood – leaders no longer have to hold on to old patterns in an outdated and disproportionate effort to survive. Instead, they can become much more conscious, flexible and powerful in their internal reactions and external responses. When a secure sense of attachment, a person learns that ‘distance and autonomy are completely compatible with closeness and reliance on others. There is no tension between autonomy and relatedness’ (Mikulincer & Shaver, 2007, p.14). As a result, they are more able to handle to the full range of the emotional demands of leadership.

In reviewing the literature, securely attached adults tend to have the following characteristics:

- Are sustained by positive yet mature beliefs about themselves and the world (Mikulincer & Shaver, 2007);
- Have a greater cognitive capacity for and experience with receiving empathy, and, therefore, are more perceptive of, sensitive to, and able to respond to the needs of others (Begley, 2007);

- Organize and utilize their cognitive and emotional memory functioning to a high degree (Cozolino, 2002);
- Have a high tolerance for ambiguity and tend to be less dogmatic in their thinking and communicating as a result of their intellectual openness (Begley, 2007);
- Can constructively (re)appraise situations so as to maintain an optimistic sense of self-efficacy (Mikulincer & Shaver, 2007);
- Are mindful and mature enough to repair ruptures as needed in their rapport and communication with others (Siegel, 2007);
- Engage in new, growth-promoting, self-expanding experiences and address existential concerns such as aging, love and freedom rather than having to be perpetually on guard (Mikulincer & Shaver, 2007).

Are not these many of the qualities we coach for in leaders? We can both assess and shift the level of attachment security in leaders through working with the coherence of their stories as a lever for change.

Narrative coherence

The stories that leaders tell in coaching are often windows into the larger narrative patterns in their life and a rich source of material for their development. Attachment studies reveal that one of the best predictors of a child’s attachment to a parent is the degree to which the parents’ life stories have ‘narrative coherence’ (Siegel, 2007), e.g. a meaningful integration of difficult events, a traceable plot line, and minimal ‘unfinished business.’ I would also offer that the level of coherence in their stories—about the past, present and future – often reflects leaders’ own attachment experience and the way in which they lead and interact with others at work. Secure and autonomous leaders have life stories that allow them to ‘live fully in the present, unimpaired by troubles from the past, denial in the present or attachment-related worries about the future’ (Siegel, 1999, p.91).

As such, coaches can explore with leaders the gaps in narration, relations between narrative elements, and signals for development in their stories to help them to shift the connections between their attachment-shaped schemas and actions in support of a more coherent narrative, secure attachment and effective leadership. For example, a coach can work with avoidant-attached leaders to fill in the gaps in their stories with the more difficult emotive information they typically dismiss, normalize or rationalize. A coach can work with anxious-attached leaders to notice how they tend to be preoccupied with and enmeshed in their stories as a way to support them to build greater trust in themselves and others. Leaders' stories often reflect the unresolved developmental dynamics they have brought forward through their life – and will continue to do so until they are integrated into their psyches in new ways.

Therefore, a core practice in narrative-based coaching is to increase clients' reflective capacity so they can become more aware of these narrative traces and the ways in which they shape their ways of seeing the world and acting in it. As Fonagy and Target have suggested (cited in Siegel, 1999), this reflective function is more than mere introspection; it directly influences their whole self-organizational process. I will often ask clients to tell the same story at several points in our work together as an informal means for assessing improvement in their ability to bring coherence to their experience and accessing leverage points for their development. For example, in coaching a client on his work/life balance I asked him at several key points in our work together about what it is like for him when he comes home from work – particularly in light of stories he had shared about his own experience as a child. As Wallin (in Wyatt & Yalom, 2008) observed, the attachment categories provide a way to understand the states of mind in which clients get stuck sometimes and the early relationships from which they may have arisen. Narrative coherence provides a way

of understanding these patterns as seen in the stories that clients tell about their lives.

Coaching leaders from an attachment frame

'If my team just [took more initiative], then I would not have to be so [demanding].' While each of us can fill in the blanks with plenty of our own client stories, the beauty of such lines from clients is that they provide an opportunity to help them deconstruct their experiences to get at their underlying assumptions, attachment orientations and accountability. This is not always easy to do, particularly around elements of their identity and behaviour that are deeply engrained and well defended. Like many coaches, I used to try to push past this resistance from participants and clients so we could make more 'progress.' However, in recent years, I have begun to question the value of 'pushing', the existence of 'resistance,' and the meaning of 'progress.' I have come to increasingly agree with Hillman (1983) that the task 'is not so much breaking down defenses and overcoming resistances as it is one of rediscovering the necessity of these manoeuvres which are the psyche's very responses to its weakness' (p.99).

In doing so, I am increasingly interested in exploring each client's unique 'manoeuvres, the edges and texture of their defenses, and the shadows on the other side that are essential for the next steps in their development. Defenses begin as an intrinsic and healthy part of development early in life; they are there to protect the differentiating and adaptive ego. As Gagan (1998) observed, they 'work on our behalf, altering reality by creatively rearranging conflicts into more manageable situations. The resulting distortions give us time to acclimate to life's contingencies until the anxiety of the threatening situation can be borne' (p.140). However, when these once essential defenses are used repetitively and inflexibly in the face of threats that are perceived as unmanageable they can become a barrier to development, resilience and flexibility.

Current neuroscience research seems to indicate that the over-reliance on these early defense structures tends to interfere with the development of more complex neural networks (Dougherty & West, 2007).

As a result, I have moved to a 'pulling' strategy in trusting that clients will find their own path, reframed 'resistance' as the discovery of a self-definitional boundary to be explored, and withdrawn my attachments to 'progress' to make room for greater awareness. Rather than waging Sisyphean battles with our clients, coaches are better off engaging them about what they are seeking to attain or accomplish – albeit often in non-conscious ways – through their stories and their actions. In doing so, coaches will be able to more fully appreciate the underlying aims behind their behaviours and see them as adaptations that once had survival value at an egoic level and still have nonegoic value at deeper levels. The ability to recognize clients' attachment patterns in their stories – and help them to do the same – is the first step in helping them develop a more coherent narrative and attain greater *earned security*.

A 'push' coaching strategy with the leader who is seen as demanding might focus on setting behavioural goals to be less so with his team. A 'pull' strategy would, instead, start from the story of what happens for him when others do to take sufficient initiative (from within his view of the world), what fears this triggers now (and has triggered before), the nature of what he is defending against (usually an anticipated internal feeling state and/or a perceived external threat), and what roles and responses he instinctively takes as a result. In addition to addressing specific interpersonal dynamics, coaches can also help leaders learn how to deal with high levels of environmental and emotional stimuli and still retain high degrees of integrity and functioning. In order to support this 'broaden-and-build cycle' of attachment security (see Mikulincer & Shaver, 2007) coaches can assist clients to surface and evaluate their defensive strate-

gies so as to develop alternatives more in line with their current goals.

One way that coaches can do this is by looking for points of breakdown in the coherence – of their clients' stories – those places where the old story doesn't work anymore or is incomplete, but that serve as openings for breakthroughs in a client's life. For example, I worked with a client who complained about the lack of co-operation and consultation from his executive team. In doing so, I helped him to notice the places in his stories where he turned away offers for help – and rationalized doing so – such that he continued to stand alone. While this was a familiar place for him to be, it was no longer satisfying for him personally or sustainable for him professionally. These breakdowns can be seen and used as openings to the developmental edges in clients, those in-between spaces (Drake, 2008, in press) where growth most often occurs.

Many of the issues leaders bring to coaching are 'embedded in their character armor, shaped during development as an adaptation against real or imagined danger. ... This armor is largely preverbal and organizes during the first years of life' (Cozolino, 2002, p.60). This is exacerbated by the fact that many organizational leaders have been acculturated to 'get over it' in the face of difficulty or grief, such that elements of their authentic personalities and true potential are pushed aside or diminished. As a result, they devote precious life energy in remaining vigilant to protect those aspects of themselves around which they feel less secure. However, the defenses they develop to avoid some experiences prevent them in the end from seeing reality clearly and restrict their range of affect and action (Fulton & Siegel, 2005). Coaching can re-create experiences that provide leaders with opportunities to candidly observe their attachment-related patterns, explore their origins, and seek out new, more secure, options.

Five narrative strategies

In *A Secured Base*, Bowlby (1988) proposed a model of change based on ‘helping a client understand his or her accumulated, and often forgotten or misunderstood, attachment experiences, identify and revise insecure working models by transforming them into more secure models, and learn about ways to achieve both comfortable intimacy and flexible autonomy’ (Mikulincer & Shaver, 2007, p.406). He discussed five therapeutic tasks that contribute to the revision of insecure working models and the achievement of positive therapeutic outcomes. I have revised and extended this list to provide a guide for coaches who want to understand and facilitate the development of their clients using attachment and narrative frames.

1. *Provide clients with a sense that the coaching sessions are like a safe haven and a secure base from which they can explore their defensive strategies (both beliefs and behaviours).* This provides leaders with a ‘holding container,’ a ‘safe place,’ where they can relax their *narrative grip* (Boscolo & Betrand, 1992), often for the first time, and adopt less defended positions relative to their developmental, interpersonal, and leadership demands. It is important for most clients to experience the primal comfort of right hemisphere to right hemisphere resonance – as they did to varying degrees as infants – as the basis for the felt sense of a safe haven and a secure base for further work (Badenoch, 2008; Siegel, 1999). The goal is to move them to a ‘sweet spot’ where there is sufficient juice to activate their awareness and engage them but sufficient safety so they can stay present to their defenses and make new choices. For example, I spent two months coaching Jim¹, a leader in local government, to observe his health habits before he was ready to deal with

his highly avoidant relational patterns and what this was costing him personally and professionally.

2. *Use the rapport that is gained to help leaders take a good look at how they currently relate to others, how they currently narrate these relationships, and the biases inherent in their constructions.* This aspect of the work is based on the need for an increased testing and facing of ‘reality’ as the basis for change. This is important because as Dougherty and West (2007) point out, ‘our woundedness, our individuality, and our gifts are directly related. Within our character structure is the essence of what is needed for transformation and individuation’ (p.2). Once Jim and I had developed sufficient trust – such that the triggers related to his attachment avoidance patterns relaxed – I helped him examine the impact of his relational style on his significant relationships and the hidden assumptions behind his tendency to overwork (as one of his compensatory strategies). In doing so, he began to soften his defenses and broaden his stories to include more of his compassionate nature.
3. *Use your coaching sessions as a laboratory for the study of clients’ attachment-related behaviours, inevitably including the transference and projection of established working models onto you and the coaching relationship, and the opportunity to experiment with new, more secure, relational patterns.* If we think of coaches as ‘mirrors’ for clients, it is essential that we do our own development work on a regular basis so we remain compassionate, clean, and clear in our reflections. Doing so will give clients the experience of being understood and the positive feelings associated with secure relationships. As time goes on, bridges can be made between what goes on in the coaching relationship and what can

¹ The name and some details have been changed to preserve anonymity while providing sufficient integrity and utility as a case.

happen in a leader's other important relationships – in the past, present or future (Wallin in Wyatt & Yalom, 2008). For Jim, it was about making agreements with me to have heart-to-heart conversations with key members of his extended family as we had done in our sessions together.

4. *Help leaders to reflect on how their working models and their subsequent interpersonal patterns – particularly around the roles and positions they tend to take relative to significant others – are rooted in childhood experiences with primary attachment figures.* In doing so, it may be useful then to consider Cozolino's (2004) advice on three key messages for clients, 'this defense was once very important, but now is hurting you, and it may no longer be necessary' (p.145). The aim is to help clients recognize that although their working models may once have been adaptive, or at least seemed better than the alternatives when interacting with non-optimal attachment figures, they are no longer sufficient in meeting the demands of leadership or even of their own drive for wholeness and growth. For Jim, it was important to finally acknowledge the lifelong patterns with his own father and to connect the profoundly dismissing treatment he experienced throughout his life with the ways he showed up as a husband, parent and boss that were both distant and over-involved. It was not about either blame or a direct causality, but rather to help him give voice to the pre-verbal roots for the patterns of relating and behaving he sought to change.
5. *Position yourself as a coach as a 'good enough' and available caregiver to help leaders experience other attachment orientations and behaviours.* One way to do so is to 'react to clients' attitudes toward proximity in ways that collide with their demands and disconfirm their expectations and maladaptive patterns of relatedness. This collision provides an opportunity for

corrective emotional experiences that seem to be beneficial for both alliance strength and client functioning' (Mikulincer & Shaver, 2007, p.423). You can look at coaching as a relationship in which coaches, as surrogate attachment figures, make room for experiences the patient's original attachment figures couldn't make room for. The research indicates that the relationships that yield the most resiliency are those that are maximally inclusive of the depth and breadth of clients' feelings, desires, views, behaviours, etc. (see Wallin in Wyatt & Yalom, 2008). In this way, coaching is a venue for liberation such that leaders can learn to breathe into greater integrity, authenticity and resiliency. For Jim, it was the eventual decision to take early retirement and relocate to be near his grown children, but to leave with a smile on his face for the first time in years.

Conclusion

According to recent research, approximately 55 per cent of children are securely attached, a decrease of about 10 per cent in the last 10 years (cited in Badenoch, 2008, p.63). Given that these children are the workers and leaders of tomorrow, it is imperative that we take notice of what this figure means for our organizations and our societies. As the global community wrestles with a disruptive economic crisis and ecological turning point, the time is now to think again about how to develop the leaders we will need for a brave new future. Given the emotional, technological and social complexities of the challenges we face, it is more important than ever to develop leader who have a secure attachment. As such, coaching is a gift for leaders as a sanctuary in the midst of organizational and civic cultures 'with fewer and fewer psychic homes, places and moments, persons and situations where one can take off the armor, put down the defenses' (Paris, 2007, p.121). It is my hope that more coaches will take up attachment theory as a resource for assessing and

helping leaders develop greater attachment security, bring more coherence to their narratives, and find their path to more authentic and mature leadership as a result.

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Coaching from the inside: Building an internal group of emotionally intelligent coaches

Annie McKee, Felice Tilin & Delores Mason

While many senior executives can both afford and benefit from world class external coaching, this may not be an affordable or manageable option for many leaders in large organizations. Developing a cadre of internal coaches has the benefits of: (1) cost containment; (2) internal capacity to create a coaching culture; and (3) coaches make better managers. In a case study of a large European bank implementing a culture change the authors trained coaches how to coach using emotional intelligence and a change model called intentional change. Surveys and interviews of the leaders who were coached by internal coaches revealed five tangible results: (1) an increase in the speed of managers' leadership growth; (2) an increase in manager loyalty to the company; (3) improved communication among people; (4) increased ability to solve conflicts; and (5) a renewed passion and awareness that part of their ability is to develop others.

ROBERTO NICASTRO, CEO and GIOVANNI 'GIANNI' CHELO, VP of HR, realised they were sitting on a gold mine at UniCredit Banca (UCB). As a result of an innovation leadership development programme, there was now a cadre of energised, well-trained internal facilitators and thousands of inspired, eager managers armed with a new set of ideas and experiences. Managers saw the facilitators as trusted advisors and regularly called them for advice and counsel after programmes were completed. It became clear that there was an opening for more intensive work on leadership at UCB.

The Teleos Leadership Institute was asked to develop a coach training programme for these facilitators, and in retrospect Gianni Chelo describes the goals this way: *'The ultimate aim was to create a coaching culture among the leaders at UCB. In order to achieve this we created a unit totally dedicated to coaching. The Resonant Leadership for Results® (RLAR) programme¹ and coaching represent the 'UniCredit Way' to be a leader, and we decided that as we merged with different banks, we would begin with RLAR and then coaching to give people a common leadership culture that would have results'* (Teleos, 2008).

As it happened at UCB, more and more organisations are recognising the value of coaching for senior leaders. Executive coaches help the busy executive identify and evaluate strategic decisions, clarify his or her own values in relation to the organisation's values and goals, and prepare leaders to take the reins as champions and models of change. The executive coach creates an environment where a leader can explore core aspirations, reduce the effects of power stress and unleash true potential.

Even CEOs and senior executives see the benefit of acquiring an executive coach to help them navigate through the often turbulent changes in our global, complex world. After seeing the benefits for themselves, senior executives are often enthusiastic about having other leaders and managers involved in a coaching process. But there is a catch: Despite the obvious benefits of coaching, it can be a co-ordination nightmare to provide consistent, high-quality coaching for dozens, maybe hundreds of managers. And the cost of external coaches for large numbers of managers can be a significant obstacle.

¹ A Teleos leadership programme based on emotional intelligence, used by UCB.

One way to reduce cost and manage quality is to build internal coaching capacity among HR professionals and highly talented line managers. This was what Gianni Chelo at UCB decided to do. UCB, part of the UniCredit Group network of European banks and financial institutions, is the largest bank in Italy. In 2004, UCB was at a turning point, transforming from a mid-sized national bank to a global financial institution. Through mergers and acquisitions they were knitting multiple institutions together, working toward building a shared culture and an organization focused on excellent customer service and great results.

Top executives were convinced that leading with emotional intelligence and resonance would be critical to this transformation and to business results (Goleman, 1995; Goleman, Boyatzis & McKee, 2002; Boyatzis & McKee, 2005; McKee, Boyatzis & Johnston, 2008). They were impressed by research showing that emotional intelligence competencies, not IQ, distinguish outstanding leaders from average. As a way to quickly bring leaders up to speed, senior leaders embarked on focused coaching and engaged in lively dialogues about how to transform their individual leadership practices. Concurrently, a process was designed to engage over 3000 managers in leadership development. This programme, Resonant Leadership for Results[®], was intended first to develop leaders' emotional intelligence and strategic thinking. Second, and also important, the programme developed the capacity of a group of carefully selected HR and line managers. These individuals became facilitators – delivering over 200 programmes during a 12-month period.

Phase Two involved targeted programme delivery and continued individual coaching for executives. Together with Gianni Chelo, we also worked to find a way to make high-quality coaching available to large numbers of directors and managers across the entire bank. Specifically, we decided to develop a process to train the facilitators to be executive coaches, and then to deploy them across

the organization. Our collaborative venture, described in this article, demonstrates that building this internal capacity to 'coach from the inside' is indeed possible and is a powerful way to develop large numbers of leaders over a short period of time.

Why consider coaching from the inside?

While many C-suite executives can both afford and benefit from world class external coaches, coaching is not always affordable or manageable for many leaders in large organisations. Good external coaches charge from \$10,000–\$100,000 per coachee for approximately nine months (Rock & Donde, 2008). Although the time span varies, a typical engagement includes six to 12 face-to-face meetings with telephone calls, ad hoc meetings, and e-mails in between.

The complexity of managing a large cadre of external coaches is also significant. First, there is huge variance in approaches to coaching and to the skill levels of coaches today. From both a quality and results standpoint, it is extremely hard to identify what exactly happens in the coaching process and how managers benefit. Second, we find that often, coaches work with very few managers in a given company and have little or no other exposure. It is likely, therefore, that they do not understand organizational culture or politics, or the goals or expectations of their clients' managers and leaders. At best, they only have the view from the perspective of their coachee(s) and a few others.

So, aligning external coaches to your organisational needs and values is enormously challenging and takes strong company focus and the resources to create, sustain and evaluate results (ibid). Time and again we find that HR leaders in large corporations have no idea who is being coached, who the coaches are, or what outcomes result from the coaching assignments. In fact, The Center for Effective Organizations at the University of Southern California surveyed 55 companies and only 50 per cent of the firms provided any central co-ordina-

tion of coaches (Levinson, McDermott & Clarke, 2004).

In large organisations, developing a cadre of internal coaches has multiple benefits: (1) cost containment; (2) internal capacity to create a coaching culture; and (3) coaches make better managers. Cost containment is obvious. Depending on availability of internal personnel, the cost of salaries and the level of coaching expertise, the cost of coaching 20 individual managers can be as little as \$120,000 per year (Rock & Donde, 2008) – that's \$60,000 less than the average for external coaching.

The second reason to develop internal coaches is that the group of talented people who are trained as coaches can subsequently serve multiple purposes in the organisation. They can spread a coaching culture, organise coaching around company values and leadership competencies, and provide coaching deeper into the organisation year after year.

And third, research shows that when trained employees take on other business or HR roles, they demonstrate the best leadership and retain more direct reports due to the fact that they have developed and practiced coaching. This coaching leadership style has been shown to have a positive impact on organisational culture (Goleman, 2000).

Coach development at UniCredit Banca

In 2004, UniCredit Banca (UCB) requested a leadership programme grounded in the principles of resonant leadership and emotional intelligence. UCB had recently acquired several banks in Italy. They were looking for ways to build a leadership culture that would permeate the organisation. In collaboration with senior executives, we developed Resonant Leadership for Results® (RL4R) that was intended to support the shift towards a customer-focused, service oriented, global bank.

The opportunity to become 'faculty' and work for up to two years in this programme was advertised internally. Several hundred line managers and human resource profes-

sionals applied, and through a rigorous selection process, 30 were chosen. These individuals participated in two weeks of intensive Train the Trainer programme that focused on emotionally intelligent leadership, adult learning, facilitation skills and practice, group dynamics, organisational power and politics, and resonant leadership. Once trained, the UCB facilitators delivered the RL4R programme to over 3000 bank managers. At the end of the process, there was marked improvement in customer service, managerial communication, and morale. There was now a 'shared language of leadership' and the beginning of a common culture. Moreover, the facilitators gained invaluable experience, profoundly developed themselves, and built many ongoing relationships with managers across the business. The programme was deemed a success. And it was clear that the RL4R programme had opened the door to building internal capacity that could – and ultimately would – support managerial development across the organisation.

Beginning with introductory sessions, selected facilitators engaged in experiential coach development workshops that addressed topics such as coaching competencies (Boyatzis, 2005), presence (Rainey Tolbert & Hanafin, 2006), ethics, and the boundary between coaching and therapy. The programme ultimately involved 15 days of intensive training, supervised coaching assignments, coaching clinics under the supervision of an expert executive coach, and focused individual feedback. Quality control continued post-training, and coaches were ultimately deployed across UCB, engaging with hundreds of managers.

Chelo attributes the success of the internal coaching programme to four factors: (1) Assisting people in developing emotional and social intelligence competencies and the capacity for resonant leadership has profound and lasting positive impact throughout the organisation; (2) Managers valued an approach that focused on the development of each leader as a whole

person; (3) Coaches were carefully selected and trained, and are very passionate about coaching; and (4) The power of the Teleos approach to coaching was a complement to the core values of the company.

(1) Assisting people in developing emotional and social intelligence competencies and the capacity for resonant leadership has profound and lasting positive impact through the organisation. The coaches participated in intensive training to develop their own emotional and social intelligence and resonant leadership while simultaneously learning to apply these skills in their coaching engagements. They learned how to apply the research-based emotional and social intelligence competencies which emphasise Self-Awareness, Self-Management, Social Awareness and Relationship Management (see Figure 1a).

(2) Managers valued an approach that focused on the development of each leader as a whole person. Coaches learned and practiced ‘coaching with compassion’, which we define in the book *Resonant Leadership* as

helping others in their intentional change process (Boyatzis & McKee, 2005). In our approach, coaches help people to seek *their* personal dreams and aspirations rather than the instrumental goals assigned to them by managers in a typical performance development process. In order to be able to do this with and for others, the coaches embarked on their own two-year quest to get in touch with their personal dreams and passions and engaged in activities and exercises that strengthened the practice of compassion with others.

(3) Coaches were carefully selected and trained, and are very passionate about coaching. UCB engaged in one of the most careful selection processes we have ever seen. Each facilitator for RL4R, and then each coach, had to formally apply to the position. They had over 600 applicants for 24 positions in the RL4R leadership programme and 200 applicants to fill 12 coaching positions. Each candidate participated in a behavioural event interview based on a set of pre-defined criteria and was put through specially designed assessment

Figure 1a: Emotional and Social Intelligence Competencies.



centre activities. Last but not least, each person was interviewed to determine their passion about coaching and leadership. In training coaches, as with coaching leaders, we have found that passion for coaching is the fuel that drives them to keep learning, stay dedicated to the needs and wants of their coachees and to achieve results that are consistent with what the coachee/client wants for themselves.

(4) The power of the Teleos approach to coaching was a complement to the core values of the company. Our Coach Capacity Building Programme focused on emotional and social intelligence, resonant leadership, and intentional change². These foundations complemented UCB's commitment to people, service and results, as well as building a healthy organisational culture and encouraging life-long learning.

Furthermore, we ensured that coaches learned how to coach, as opposed to giving advice. Many of the coaches were former bank managers or HR professionals. In these positions, they were valued for their content and technical knowledge and ability to mentor or give advice. As internal coaches, these individuals brought knowledge of the business and the culture, which was tremendously valuable. However, if they had over-relied on these strengths or consistently delivered 'expertise' in the form of advice, they would not have been as effective. It can not be over-emphasised that internal coach candidates need a great deal of practice and feedback in order to unlearn some of their advice-giving habits. This means learning to listen, learning to ask powerful questions, and creating a safe environment based on trust and confidentiality.

Coaching from the inside at UniCredit Banca: The results

The outcomes of coaching at UCB were measured by a survey that contained open-ended questions and a Likert scale for rating specific questions. We have noted five tangible results from developing internal coaching as relayed to us by Gianni Chelo:

1. *'An increase in the speed of personal leadership growth – people now grow into their roles more quickly and more successfully. Almost all managers and leaders say that they have increased awareness, that they need to be constantly 'on the road' of personal development and that this is the best way to grow and be able to meet the challenges of constant changes.'* Most leadership development and learning experts join us in our belief that those who can learn will succeed. In today's environment it is imperative that leaders are curious, open and 'on the road' to new ways of managing themselves, others and change.
2. *'Managers are more loyal to the company.'* People felt valued as a result of the investment coaching represented. The fact that people were given this support, whether they had been in the company for years or they were merging from another bank, signalled great care and compassion. Managers have reciprocated with loyalty to and increased pride in their jobs and the company.
3. *'Communication among people has improved.'* In 2004, in our initial research of UCB, we found that a main area of difficulty was communication as new banks merged into UniCredit (Teleos Dynamic Inquiry Research Study, 2004). Through the coaching process, there was a marked improvement in interpersonal communication as well as communication between managerial levels. We attribute this to coachees learning to listen and be more empathetic with their colleagues.

² The Teleos Leadership Institute Coach Capacity Building Programme is ICF-accredited at the ACTP level.

4. 'An increased ability to solve conflicts.' In addition to increasing empathy, the coaching process gave managers another sounding board (the coach) to confidentially discuss difficulties and conflicts and to explore alternative solutions to these issues. Alternative methods of conflict resolution could be weighed, practiced and then implemented. Today, managers have more and better methods in their 'tool kit'.
5. 'Leaders have a renewed passion and awareness that part of their job is to develop others.' This is perhaps the most subtle outcome. When the company offered to provide a coach for people's development, managers felt more compelled to adopt that coaching style in their own leadership and develop others. This increased leadership capacity at every level of the organisation.

Finally, Gianni Chelo shared additional advice for others who want to implement a successful internal coaching function: 'Coaching is basically an investment in people. The results come at a personal level and on a company level. To ensure this I would suggest a strong and clear top management sponsorship and the largest number of managers, especially middle managers, be involved in the process.'

Coaching for emotional intelligence and the power of resonant leadership

As executive coaches and trainers of coaches, we find ourselves coaching an increasingly sophisticated audience of clients that need all of the above and more. Today's leaders have a multitude of complex needs that span a wide range: addressing specific leadership challenges; leading teams through multiple levels of change; reconnecting with personal values and goals. In order to keep up, stay emotionally connected, flexible, authentic and inspirational, outstanding leaders must continually be on a journey of intentional change.

Meaningful and important changes do not happen by chance. Part of the challenge

of creating and sustaining excellent leadership is to recognise, manage, and even direct one's own process of learning and change. People who manage their own development intentionally are poised to make good choices about what they need to do to be more effective and more satisfied with their lives. Drawing on decades of research, much of it conducted by Richard Boyatzis of Case Western Reserve University, we can now say with certainty that the Intentional Change Model can help people to engage in personal transformation successfully, and with excitement and enthusiasm (Boyatzis, 2006). Needless to say, intentional change is the foundation of our coaching process.

The Intentional Change Model

Longitudinal research studies in the last few years have shown that sustainable change occurs as we focus on five major discoveries. These discoveries, as discussed in Goleman, Boyatzis and McKee's 2002 book, *Primal Leadership: Realizing the Power of Emotional Intelligence*, are as follows:

1. *The Ideal Self*. The last 20 years have seen considerable research done on the power of positive imaging and visioning. The research in sports psychology, meditation, and biofeedback indicates that we can access and engage deep emotional commitment and psychic energy if we engage our passions and catch our dreams in our ideal self-image (Goleman, Boyatzis & McKee, 2002). Focusing on what we want out of life and who we want to be is the most important step of intentional change. Surprisingly, even though we know the importance of considering a positive view of ourselves and our future, we often skip this step. We take on others' hopes for us, or we simply let ourselves become numb to our own dreams. So, the first challenge is to find our dream, our own vision for ourselves and our lives.
2. *The Real Self*. To move from where we are now to where we want to be, we need to have a sense of how others see us, and

how that image matches, or not, with how we see ourselves. This requires deep self-awareness, mindfulness and the willingness to be vulnerable. Becoming clear about oneself and how others experience us can be difficult and takes courage. Why is this? Because over time, we build a certain – and usually positive – self-image, and our psyche actively protects that image from harm or change by preventing us from taking in all of the information about ourselves, especially negative or disconfirming information. This defence mechanism serves to protect us, but it also conspires to delude us into an image of who we are that feeds on itself, becomes self-perpetuating, and eventually may become dysfunctional (Goleman, 1985; Paulus & Levitt, 1987). So in order to really see ourselves as we are, we have to let our defences down. The comparison of the real self to the ideal self results in identification of our strengths and weaknesses – leading to our learning agenda.

3. A *learning agenda* helps us capitalise on our strengths and move us closer to our personal vision while possibly working on a weakness or two – or working to maintain the ideal current state of our life and work. This third step in the intentional change process, development of a learning plan, helps us focus on moving toward the desired future.

While performance at work or happiness in life may be the eventual consequence of our efforts, a learning agenda focuses on the process of development itself. It focuses our energy on learning first, outcomes second. The orientation to learning arouses a positive belief in one's capability and the hope of improvement (Beaubien & Payne, 1999).

A major threat to effective goal setting and planning is that we are already busy and cannot add anything else to our lives. So, we can only succeed in the change process, then, if we determine when to say 'no' in order to make room for new

activities. Another potential challenge or threat is the development of a plan that calls for people to engage in activities at odds with their preferred learning style. When this occurs, we lose motivation and often stop the activities, or become impatient and decide that the goals are not worth the effort (Kolb, 1984). For instance, an executive who learns best by jumping right in to try possible solutions in order to analyse what might work best, will not be motivated to read a detailed textbook or analytical documents. If reading such documents is part of this executive's learning plan, he or she may avoid that task and not achieve learning goals.

4. *Experimenting with and practicing new habits or reinforcing and affirming our strengths.* Once our agenda or plan points us in the right direction, we have to practice sufficiently to go beyond comfort to mastery of new habits. Our new attitudes and behaviours have to become unconscious responses. To develop new behaviours, we must find ways to learn more from current or ongoing experiences. That is, experimentation and practice do not always require attending courses or engaging in new activities. It may involve trying something different in a current setting, reflecting on what occurs, and experimenting further in this same setting. Robert Thomas refers to this as 'practicing while you perform' (Thomas, 2007).

Interestingly, people often downplay experimentation and rush to try new behaviours in 'hot' settings, like work. It is easy to become discouraged if we do this, because it is not necessarily safe to try new ways of being in settings where performance is constantly measured. In fact, experimentation and practice are most effective if they are done in conditions in which we feel safe. This sense of psychological safety creates an atmosphere in which we can try new behaviour, perceptions and thoughts

with relatively low risk of shame, embarrassment or serious consequences of failure (Wheeler, 2008). Early wins spark hope which in turn engenders energy and commitment to the process. For example, if an executive wants to practice developing his interpersonal skills, he might make an arrangement with a friend or peers to support him in practicing one-to-one conversations, or role-play with a coach.

This is one reason that executive coaching can be so helpful. A good coach can provide perspective, feedback, guidance, and confrontation, all within the confines of a safe and confidential environment. Also, a good coach can coax and goad us to continue the practice in the same way a fitness instructor will push us for 'five more' repetitions of an exercise.

Hopefully, following a period of experimentation in a safe setting (such as with a coach or in personal activities), we will want to practice new behaviours in the actual settings within which we wish to use them, such as at work or at home. During this part of the process, intentional change and learning begins to look like a continuous improvement process.

5. *Developing and maintaining close, personal relationships.* Successful personal development always involves others. Connection is essential. Based on theories of social identity our social setting, our culture, our reference groups, and our relationships mediate and moderate our sense of who we are and who we want to be. We develop and elaborate our ideal selves from these contexts, as well as label and interpret our real selves. We recognize and value strengths (things we consider part of our core and wish to preserve) and identify gaps (things that we consider weaknesses or that we wish to change) from relationships as well.

Sometimes, this is really the first step: finding a coach or perhaps a colleague

who is on a similar quest helps us to get started on our learning journey. Talking to people, checking our reality with theirs, and opening ourselves to their views helps us to clarify our vision and see reality too. Honest dialogue can spark our own creativity, new ways of understanding ourselves and others, and help us stay the course.

Involving others, even supportive others, takes courage and persistence. It is not easy to seek others' opinions, expertise, and help. By involving others, we turn up the heat. It is a lot harder to stop the process of developing ourselves when we have other people invested in helping us change.

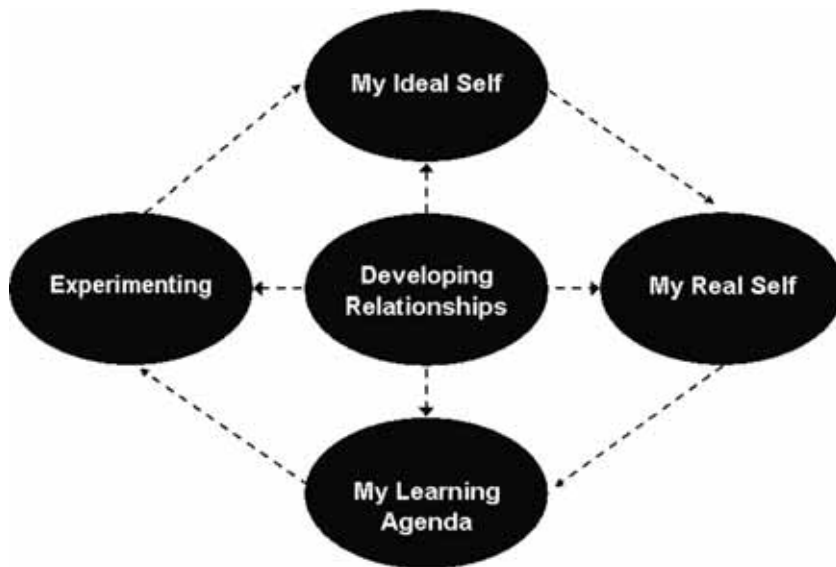
The five discoveries of intentional change are shown in Figure 1b as a cyclical process. Cycling through these discoveries allows us to integrate beliefs, ideals and passions with who we are. As we learn, we become more in tune with ourselves and with others and ultimately develop the capacity for resonant leadership

Resonant leadership

We all recognise resonant leadership when we experience it – leaders who are able to inspire those around them, create a positive work environment and produce great results. But even the best leaders have tremendous difficulty sustaining resonance during tough times (Boyatzis & McKee, 2005).

The reality is that leaders cannot remain effective if they cannot sustain themselves in the face of the inevitable stress inherent in leading others to achieve results. Power stress is an integral part of being a leader – the unending day-to-day crises, complex decisions, responsibilities and the loneliness that comes with occupying a top spot puts huge pressure on leaders and adds up to a chronic, slow burning strain that is often interrupted by bouts of acute stress. Stress is, of course, always part of the leader's reality and always will be. It is not power stress that is the problem in itself, but the lack of

Figure 1b: Intentional Change Model.



recovery time (renewal) or the effective management of stress. Many leaders bury themselves in their jobs at times of crisis and trouble, often compounding the problem. They fall victim to the sacrifice syndrome: giving and giving, and leaving no time for renewal. When this happens dissonance becomes the default for leaders personally and for those around them.

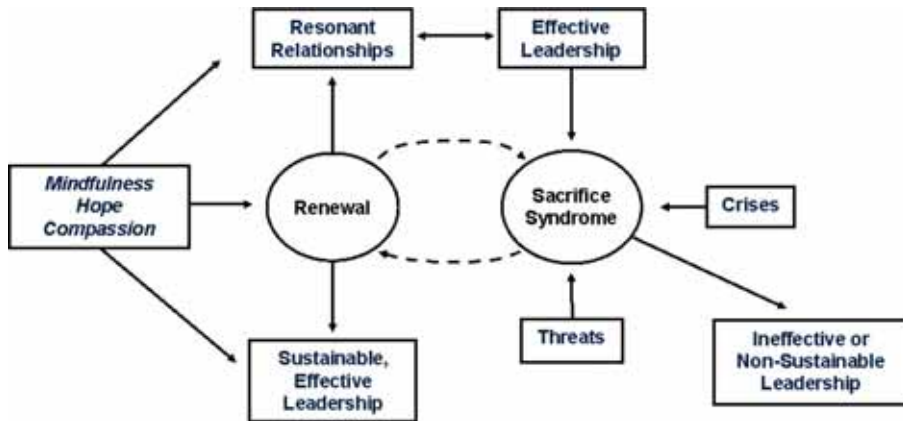
Leaders need to learn how to manage the cycle of sacrifice and renewal to avoid slipping inadvertently into dissonance (see Figure 1c). Dissonant leaders wreak havoc. They are at the mercy of volatile emotions and reactivity. They drive people too hard, for the wrong reasons, and in the wrong directions. They leave frustration, fear and antagonism in their wake. And they are often completely unaware of the damage they have done.

We have identified three experiences that are essential in supporting the tough work of becoming and sustaining resonant leadership. These elements: mindfulness, hope and compassion, are discussed in *Becoming a Resonant Leader* (McKee, Boyatzis & Johnston, 2008).

Mindfulness means being awake and aware of ourselves and attuned to the world and people around us. It is comparable to the coaching concept of 'presence.' The ability to focus your thoughts and emotions in an appropriate manner at the appropriate time is a core element of mindfulness. People who cultivate mindfulness improve cognitive flexibility, creativity, and problem-solving skills. In other words, leaders who pay attention to the whole self – mind, body, heart, and spirit – can literally be quicker, smarter, happier, and more effective than those who focus too narrowly or only on short-term success. Being mindful is the very thing resonant coaches learn to do, and what they need to help their clients learn to do in their day-to-day work.

One of the most powerful aspects of coaching is the attention the coach gives to the client. It is rare that someone listens as attentively, supportively and actively as a coach. We encourage coaches to practice mindfulness, whether it's by preparing for an upcoming coaching session, doing a breathing meditation, listening to music or

Figure 1c: The Cycle of Sacrifice and Renewal.



doing a physical activity. These practices enable the coach to be present. Through modelling and conversations, the coach helps the coachee learn the same mindful practices.

Hope enables us to believe in an attainable and optimistic vision of the future and to move towards goals while inspiring others to do the same. It is not just optimism; it is the energy within you that moves you and others to believe in a better future. The latest research in neuroscience shows that the experience of hope actually causes changes in our brains and hormones that allow us to renew our minds, bodies, and hearts (Groopman, 2004; Snyder, Rand & Sigmon, 2002).

Hope engages and raises our spirit, mobilises energy, and increases resilience. Beyond this, hope and the vision of the future that comes with it are contagious. They are powerful drivers of others' behaviour. Resonant coaches inspire hope and energise clients to awaken to a better future. They start from a place of abundance, not from deficiency. Our approach focuses on the coach helping the client identify his or her strengths, and to build a vision that motivates and inspires.

Compassion is a state that enables us to better understand people's wants and needs, and to be motivated to act on our feelings.

Like hope, compassion is also contagious. Compassion parallels empathy, and takes it one step further: compassion is empathy in action. The resonant coach sparks positive emotions in the coachee and enables him/her to do the same in his/her leadership capacity. We work with coaches to have compassion for themselves, for their own imperfections and for each other.

Our coaching model taps into and develops the coach's compassion. A resonant coach is genuinely concerned for others' welfare and future. He or she not only understands the client's needs, but is motivated to act on his or her own feelings. By learning to communicate effectively and articulately, coaches allow others to vent or clear the situation without judgement or attachment in order to move on to the next steps in the coaching relationship. The coach achieves this while maintaining the appropriate business relationships and boundaries, meaning he or she never forgets this is first and foremost a professional relationship. Most importantly, a resonant coach maintains a positive outlook. He or she remains optimistic despite setbacks and is able to inspire trust and commitment with his or her clients.

Conclusion

Coaches trained in emotionally intelligent leadership, intentional change and resonant leadership can make a difference. For leaders and the organisation, the investment in coaching from the inside can increase the speed and depth of leadership development, create organizational loyalty, improve communication, enhance manager's ability to solve conflicts, and make developing of other employees a part of every leaders' job.

No one knows the outcome of our current global economic crisis. We believe that if organisations are to survive and flourish, they need to tap the talent, creativity and leadership at every level. Today, more than ever, leadership counts. As an integral part of the solution, well selected and trained internal coaches can be critical to developing effective leaders at every level of the organisation.

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Behind the scenes in the identity laboratory: Participants' narratives of identity transition through group coaching in a leadership development programme

Elizabeth Florent-Treacy

This study explored written narratives of 28 participants' experience in one executive leadership development programme, to shed light on the way participants explore and experiment with new working identities in the leadership development identity laboratory. The study adopted a mixed-method approach. A series of six programme-related case studies per individual was analysed. These narratives were written over a period of 15 months. Findings from this study were presented to the group after the end of the programme. As the author was also a participant in the programme, the methodology was qualitative and hermeneutic, with the author using 'self as instrument'. The narratives were studied through a conceptual interpretation approach. The narratives show participants moving through an epigenic process similar to group psychotherapy. This study shows that group psychotherapy can be adapted to create an identity laboratory experience for executives. In addition, this study shows that the process of writing can be a critical success factor in executives' passage through an identity lab experience.

Keywords: identity laboratories, identity transition narratives, leadership coaching, executive coaching, leadership development, evaluation of leadership development programmes, group psychotherapy.

Identity and the world of work

TRANSITIONS in working identities, while common, can be quite destabilizing – particularly when a person is in a position of organizational leadership. It can be very difficult for leaders to find time for self-reflection, to gather honest feedback from a group of trusted peers, and to take the distance and perspective needed to evaluate options and test new alternatives. One response to this problem has been to create executive leadership development programmes that have a component of identity work as a part of the process.

In general, executive programmes are designed for mid- to high-level professionals in their early 30s to late 50s, who are contemplating career change or advancement. Thus, it is not surprising that people join

executive education programmes not only for the content, but also for another, often undeclared motive, which is to create the time and space to take stock of their life and explore their personal agenda (Kets de Vries & Korotov, 2007). Indeed, taking a class in an educational institution can be seen as an example of transitional space (Carson, 1997). Although this may not be apparent as they enter the programme, many participants find that what was originally seen as an educational opportunity eventually becomes the first step in developing a new working identity (Ibarra, 2003, 2005), particularly if they are able to set aside 'central, behaviourally-anchored identities' – their internal compass – and experiment with provisional selves, shaped by task, social and emotional feedback (Ibarra et al., 2008). Mirvis (2008)

relates a similar observation, suggesting that executive programmes may be, under some circumstances, ‘consciousness raising’ experiences which cultivate participants’ self-awareness, deepens their understanding of others, and helps them to relate to society.

However, many questions remain about what exactly happens inside this transitional space; in fact, it is very difficult to prove that anything happens at all. Of course, leadership development programmes are certainly popular, and everyone wants to believe they are getting their (considerable amount of) money’s worth. Studies of leadership programmes have shown that experiential learning can be quite profound when it stretches boundaries and takes participants to the limit of their comfort zones (McCauley, Moxley & Van Velsor, 1998). But the design of most ‘transformational’ programmes is fairly new, and the results have not yet passed the test of time, not to mention other empirical outcome measures. True, participants tend to rate executive leadership development programmes highly – a phenomenon arguably related to the fact that, to a certain extent, the participants who attend these programmes are self-selected, and then pre-selected as good candidates by programme directors. Given their high degree of motivation and expectations, these participants are predisposed to seeing a positive outcome. They are top performers before the course even begins, and at the end of the course when the evaluation forms are filled in, they are in a ‘feel good’ phase. But what happened to them during the programme to make them feel this way?

With the objective of enriching knowledge about the identity laboratory outcome, the research described in this paper is based on a qualitative, interpretive paradigm. I focused on the identity transition experience of participants in a 15-month, seven module executive development programme at a global business school. (I was also a participant in this programme, but I did not work on this research question until after the end of the programme.) This programme

Consulting and Coaching for Change (CCC), is designed to help senior executives to improve their coaching and leadership skills. My fundamental research question – Is there any indication that identity work occurs during a multi-module executive development programme? – has been asked before, so to add to the existing body of knowledge, I searched for insights in a different kind of dataset. Twenty-eight of the 35 participants in the 2007–2008 CCC programme agreed to let me use their written case studies for this research (I did not include myself or my case papers in this study). I collected and studied the series of six case papers (one after each module 1 to 6) each person was required to write during the programme.

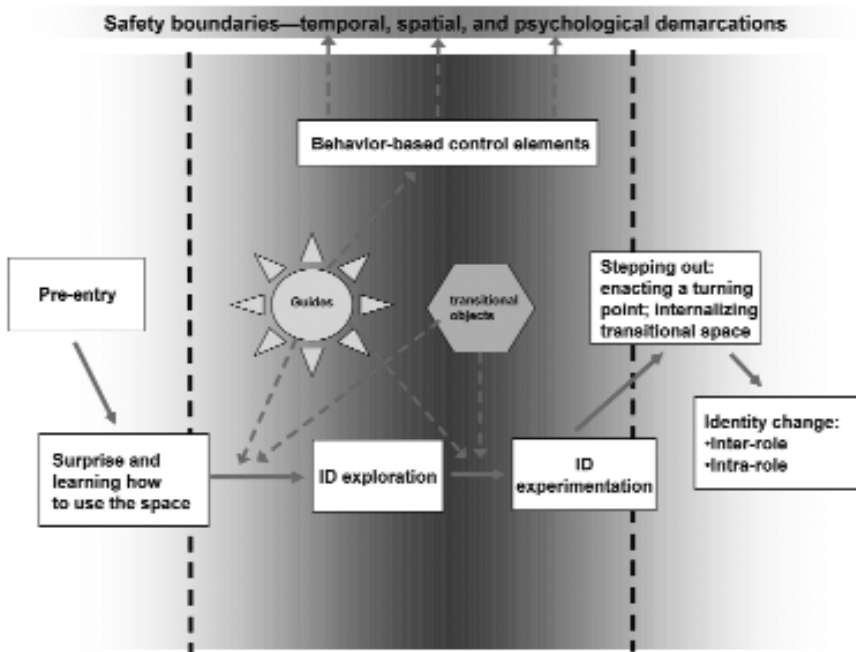
The focus of the programme I studied remains on the world of work – in this holistic, systemic approach, both the micro (the individual) and the macro (the organization) are considered to be equally important. A psychodynamic framework is taught, and a clinically-oriented form of executive coaching (Kilburg, 2004) is applied, as essential concepts in the pedagogical design. The clinical paradigm has been recognized as a solid foundation for the study of organizations (Zaleznik & Kets de Vries, 1975; Kets de Vries & Miller, 1984; Kets de Vries & Korotov, 2007; Kilburg & Levinson, 2008). This lens allows participants to dig deeper into their own identity, to decipher the reasons underlying irrational behaviour, and to seek out and understand the ambiguities inherent to any change initiative (Miller & Rollnick, 2002).

Building on research and practice focused on applying the clinical paradigm to organizational dilemmas and leadership development, and on Ibarra’s (2005) model of identity transition, which describes the process of liminality or the state of being ‘between identities,’ Korotov developed a theory of transitional environments, which he called identity laboratories (Korotov, 2005, 2007). He hypothesized that in some leadership development programmes an identity laboratory is created. Participants

enter the laboratory and, at some point, begin to experiment with new roles and behaviours. This transitional space is enhanced as participants learn to watch for the irrational, intra-psychic and interpersonal undercurrents that may influence the way people behave in dyads and groups. Korotov suggested that the identity laboratory is a safe space that is both physical and mental, the boundaries of which consist of a temporal demarcation, a spatial demarcation (a consistent use of the same physical space), and a psychological demarcation (guidelines are set to establish trust). Once inside the identity lab, he found, people are accompanied by, and experiment with, guiding figures and transitional objects. In interviews he conducted after the end of the programme, participants reported that not only had they identified and experimented with new possible identities, but that they had also developed a belief in their ability to implement these new ideas.

And yet key questions remain. The concept of transitional space environments is still ill-defined and poorly understood; rooted in individuals' personal experience; complex and conceptually difficult to relate; and delicate, sensitive, and sometimes intangible (Ritchie & Lewis, 2003). Participants who have attended a clinically-oriented leadership development programme or group coaching module often say that the experience was 'life changing' or 'a powerful personal transformation.' But how can we be sure that the transformation is more than skin deep? Although these questions are rather ambitious, the scope of this study is modest and limited; it is intended to be a conceptual interpretation of participants' here-and-now experiences in one clinically-oriented executive leadership development programme. This paper is not meant to be prescriptive; it is simply descriptive of what I saw behind the scenes in one particular ID lab.

Figure 1: Korotov's model of identity laboratories (Korotov, 2005, 2007).



The Consulting and Coaching for Change programme design

Although Consulting and Coaching for Change (CCC) candidates are pre-screened in that each one has an entry interview with a programme director, and in addition must answer a number of essay questions that require a certain amount of self-reflection, these activities are only a warm up. Virtually from day one of the programme, the CCC participants are thrust into the strange and awkward state of learning and applying new theories and coaching tools, and at the same time detaching themselves from the fires of the action to fine tune their own observing ego.

From the beginning, the temporal and spatial demarcations of the ID laboratory are set. The course is always taught in the same classroom, and each module begins with a reflective space open only to the participants and the faculty coaches. At the end of each module, the subsequent module is evoked, reminding participants that, step-by-step, they are progressing through a programme that will one day come to an end.

Another critical element of this ID laboratory is the psychological demarcation. The programme directors, who are also the faculty coaches, are not only business school academics, but are also trained and experienced psychotherapists. They have a high level of skill in coaching competencies, including knowledge of organizational and group dynamics, leadership, strategy and economics, and family systems. In addition to their capacity as teachers, they are the guiding figures described by Korotov. Their presence helps to create the ID lab boundary of safety and containment. They also serve as role models for the nascent coaching and change experimentation of the participants – and finally, they provide a constant reminder that the guiding philosophy of any reflective change agent must be: *Do no harm*.

In the first and second modules, the faculty coaches introduce the clinical paradigm, and basic skills, like effective listening, are tested. Here, participants step into the

ID laboratory, and learn to use the space. In addition, in module 1, participants form small groups, and each person is asked to tell the others in the group about an event, personal or professional, that changed his or her life in a significant way. This early experience of self-disclosure serves to set the ID lab boundary of trust and encourages self-reflection. The faculty are not present for this exercise, and so the participants are forced to seek safety and comfort in their small group. (Not all small groups have a purely positive experience, however; there are sometimes personality clashes, which the small group must learn to deal with.) Although the participants subsequently change groups several times during the programme, most of them are able to quickly recreate a feeling of security in their new group. (There is some intentional overlap, such that an individual will always find him- or herself in the new group with one member from the previous group.) Thus, from the earliest days of the programme, the participants become accustomed to what is in effect a group therapy design.

Although a great deal of informal one-to-one coaching occurs during the programme, most of the coaching interactions take place in small groups, as the above description indicates. Within the context of this programme, the term ‘group coaching’ refers specifically to a psychodynamically informed and highly personal developmental process in which a group of executives are coached in each of the seven modules by the programme directors (the guiding figures in the ID laboratory); and by their peers in their small coaching groups. Themes presented in lectures are taken out of the classroom into the group sessions, where they are immediately discussed and later tested in the real working world; examples of themes include human and organizational lifecycle, family systems, emotional intelligence, and group dynamics. In addition, in module 4 each small group works with an executive coach trained in the group

coaching process for an intensive leadership 360° feedback coaching day. This approach is both didactic and applied, as the participants *coach* and *are coached* within each module. There is an emphasis on both the individual and the system, as groups discuss lifecycle issues (Levinson, 1977) and organizational role analyses (Newton et al., 2006).

Like group psychotherapy, group coaching in this context helps to establish a foundation of trust, commitment to change, and accountability. Within the boundaries of the programme, as individuals work together and observe each other over time, the group becomes the pillar that supports coaching work; the relationships among learning partners become, and remain, very meaningful. Through discussion with faculty coaches and peer coaches, and by reflecting on their peers' life stories in small group sessions, participants become more aware of the interpersonal role(s) in which they consciously or unconsciously cast themselves. They begin to see patterns from their childhood or young adult experiences reoccurring in their workplace relationships.

Later, as participants work on action plans for leadership development in small groups of trusted peers, three powerful motivating forces – shame, guilt, and hope – come into play. Participants initially feel shame as they admit to certain behaviours, and this prompts them to make a declaration of intent to change. The sense of guilt they anticipate if they disappoint their peer group is a strong motivator to continue on the path of change. Finally, knowing that their peer group is supportive and empathetic instils participants with a sense of hope that they will be able to meet their goals (Kets de Vries, 2005).

To be sure, some groups work better than others. The process sometimes breaks down, which can lead to even further insights and learning as the group examines the dynamics of that particular situation. Globally, however, all of the emotional experiences that come out of the group setting – in particular as people share and discuss their

own feedback on 360° survey instruments and their action plans for future development – help to facilitate change.

During and after each module, participants explore – in case papers, small group meetings, and conference calls – what lies beneath the surface, and use what they discover there to help them re-evaluate the authenticity of current life experiences. After each module they go back to the 'real world', and often begin to experiment with new behaviour or identities. In a feedback loop, they return to the next module, where very often the topic of case papers and conversations will focus on their discoveries and their identity 'experiments.'

By the third module, in which the focus is on family and family business, people's emotions have become engaged in the learning process. This is where the hard work begins, as people have a natural tendency to resist the ever-tightening focus on their own motivational drivers and behaviours. Defensive reactions continue – for example, challenging the faculty's competency or commitment to the programme, or by not writing case papers or fully engaging in the small group discussions. The fourth and fifth modules are less lecture-oriented and more experimental. In module 4, results of participants' leadership 360° feedback surveys are discussed in a group coaching day. In module 5, a two-day simulation on group dynamics forces participants to experience the sometimes uncomfortable experience of regression in groups, and other group processes. The faculty coaches begin to withdraw to the sidelines in a metaphorical sense, as people turn to their small group peers for support and deeper insights – in fact it is more likely to be a peer than a faculty member who provides the catalyst for deep identity work in these modules. Here many participants talk about disorientation, confusion, doubt, failure (their own or programme design), or messiness – for a period between modules that lasts several months. Then, after the fifth module, participants realize that they have

progressed more than half way through the programme, and the temporal aspect of the ID laboratory becomes more concrete. The sixth and seventh modules are designed to be periods when people consolidate their insights, and create narratives to help them describe their identity work and their identity discoveries. As this description of the different modules indicates, the design of the CCC programme incorporates a short-term dynamic psycho-therapy orientation (Yalom, 2005), not only as a concept to be studied, but also as a pedagogical framework.

An overview of the dataset

Twenty-eight of the 35 CCC Wave 7 (2007–2008) participants agreed to allow me to use their cases for this study. There were 14 men and 14 women of diverse nationalities; most were European (Belgian, British, Danish, Dutch, German, Greek, Irish, Russian, and Swiss), but the sample also included a Canadian, an Indian, two South Africans, and one Zimbabwean. The ages ranged from 32 years old (one participant) to over 50 years old (six participants) with nearly half the group (11 participants) between 46 years old to 50 years old.

Participants were required to write a case paper after each module 1 to 6; there was no paper required after module 7. Twenty-four of the case series were complete ($N=144$ cases). Three participants did not write a case after one or several modules; one person told me he was stuck at first, and I did not ask for an explanation from the other two people. I considered the fact that these cases were never written to be valid information in itself, and I counted these participants' series as valid ($N=12$ cases). One person had lost her first case. Because I did not find a high level of identity work across the other module 1 case studies in my dataset, I considered her case series to be valid ($N=5$ cases). The total number of cases I collected and read for this study, therefore, was 161.

Why study written texts?

A study of written texts produced during the limited time period of such a programme provides a new and different lens because the case studies capture the experience of the participant as it unfolded. The participant is not responding to a set of interview questions, is not trying to recollect and reconstruct events after the fact, and has not produced an evaluation of the CCC programme upon demand. The case study *assignment* was never to write about the group coaching experience, or a personal developmental journey, or even about identity work. In fact the only guideline, after all six modules, was simply: 'Write a case study showing how you have applied the concepts or topics learned in this module to your professional or personal context.'

Participants in the CCC programme were asked to write a case study for several reasons. First, the papers help the writer to consolidate theory and practice from the preceding module. Through writing, participants capture what they are feeling and experiencing. The case papers become focal points for debate, exchanged and commented on by members of each small coaching group. Finally, as previously described in the psychotherapy context (Pennebaker, 1999), and here in the classroom as well, the act of writing helps participants to uncover and organize complex emotional experiences.

Participants had a great deal of freedom to interpret the assignment in any way they wished, with only a few rules: the paper should be about seven pages long; and it should be given to the small group peers before their conference call, which was typically scheduled for several weeks after each teaching module. The papers could (and did) take almost any form the writer felt comfortable with at the time. Participants did not know that they would later be asked for permission to use their collected case papers in a research study. Finally, the degree to which the researcher (me) influenced the participants' writing was minimal,

since I was a participant myself, and had no control over what was written, and no research-oriented interactions with fellow participants at all during the course of the programme.

Another advantage of the CCC written texts is that they capture the participants' here-and-now experience of the group psychotherapy process. Group members' reports are a rich and relatively untapped source of information; however, 'there is an art to obtaining clients' reports. ... The more the questioner can enter into the experiential world of the client, the more lucid and meaningful the report of the therapy experience becomes' (Yalom, 2005, p.4). By using texts that were not initially written for research purposes, I was able to enter this experiential world.

Although they were not written to be reflection papers, the case texts were rich and revealing narratives on four levels. On the first level, quite a few of the cases written after modules 1 and 2 followed the assignment fairly closely, recounting incidents at work, and reflecting on them. On the second level, many individual cases were life stories, and some resembled myths or fairy tales, with dangerous or life changing events. This level appeared in most cases (but not always) after module 3, the module on families and family business. At the third level, a few of the cases were ID labs in and of themselves: the individual seemed to be playing and experimenting with a new writing style and/or describing a possible new identity. Reading yet another kind of case on this level, I felt like I was like joining the person on a joyful or fearful exploration of a very private jardin secret. Finally, I discovered a fourth level which was a surprise to me: reading an individual's case series 1 to 6 in order, straight through, very often revealed a coherent and complete narrative arc, from prologue, through dilemmas and tension, through new insights and understanding, and finally

reaching a state of denouement and completion. I found this to be true for virtually all 28 of the case series, although none of them, of course, had been written with an overall narrative arc as a fundamental objective.

Many participants reflected in their texts on the central importance of the stories they had to tell, an experience that sometimes was accompanied by anxiety:

F8-3* 'Writing case stories for CCC is about writing something meaningful to me at this moment in my life. Something both business and personal related and something where I can connect both my ongoing experiences and personal challenges into the theory related to the modules.'

M9-3 '[Previously] I found the constant changing of my story unnerving and puzzling. I saw a sort of embarrassment with my close others when I tried to give words to the process and expected outcome of my transition. This made me insecure and I felt very inconsequential and irrational. ... After reading Ibarra [Ibarra, 2005] I changed this completely, seeking active feedback and reactions on my experiences and stories. This made my transition far less lonely than my earlier transitions ...'

One participant (M28-2) included a passage from Omar Khayyam that summed up his impression of the narrative creation process (and underlined another important characteristic of written narratives – their permanence):

'The Moving Finger writes; and having writ,

Moves on: nor all your Piety nor Wit
Shall lure it back to cancel half a line,

Nor all your Tears wash out a word of it.'

Knowing that their small group peers would read their narratives and give feedback created a sense of urgency, responsibility, and accountability for participants to move forward and face the confusion. Shame, guilt

*Participants' quotes are identified by gender and a number I assigned, followed by the number of the case from which the quote was taken, thus F8-3 is female participant number 8, case 3.

and hope: they must do the work, but then they had an empathetic group to help them make sense of it. This pushed people to experiment and refine their identity exploration. As one participant wrote about a new project he was developing: 'I could use the work to write cases for CCC.' Some used the cases as a means to collect their thoughts, looking for insights or deeper reflection. Others were forthright in admitting that as they started writing a particular case, they weren't sure where the case would end up – an indicator that it was not just a report of ID work in the real world, but that *the case itself* was a sort of ID lab. There was evidence of playing *in*, or playing *with*, the case studies in cases that followed all six modules:

F11-1 'To bring this exercise back to the here and now, I felt comfortable experiencing and thinking about this case, but uncomfortable writing about it. ... I found myself seeking for at least a little truth which would make my essay satisfying.' [NB: the case as an experimental place in and of itself.]

F25-2: 'It's a big relief to write everything down and look at it from 'outside' and by doing so try to get answers on some open questions.' [NB: writing helps bring new insight.]

F11-3 'I am writing my essays as lived – from the start onwards.' [NB: the case as an experimental place in and of itself.]

F14-3: 'What became very clear to me in writing this down [are] pattern[s] I had not been aware of.' [NB: writing encourages a deeper level of reflection.]

F12-4 'This paper is has also help me to step back. It has been cathartic.' [NB: the act of writing brings some relief.]

F3-5: 'This case is special. Not that the other cases were not, this is special because here I attempt to confront my fears.' [NB: writing encourages a deeper level of reflection.]

F2-5: 'There was no opening to this case and there is no closure. It is sort of a circle, a merry-go-round.' [NB: the case as an experimental place in and of itself.]

F14-6: 'But where should I begin [in her exploration of the topic she chose for this case]? ... I will try to follow my own development over time and try to figure out what brought me to where I'm standing right now. Even to me that sounds like a feeble journey. Let's see what will become out of it.' [NB: the case as an experimental place in and of itself.]

A search for meaning and understanding

The narratives showed that identity experimentation and exploration, as described by Korotov, was taking place in this programme. Patterns emerged in the narratives over the course of the modules that could be used as evidence that change was occurring (Polkinghorne, 1983), and these patterns pinpointed what was happening, and when. I looked for meaning in these texts through a hermeneutic, interpretive approach, allowing for 'ambiguity, reflection that integrates several interpretations, and double meanings, of living with opposed meanings (ambivalence), both of which may be consistent with a given situation' (Loewenberg, 2000, p.106). The goal of this kind of interpretive social research is to focus on what events and objects mean to people, on how they perceive what happens to them and around them, and on how they adapt their behaviour in light of these meanings and perspectives (Rubin & Rubin, 1995).

In addition, an interpretive approach requires the researcher to engage and participate in the context that she is studying in order to understand it (Schwandt, 1994). To accomplish this, I drew on my familiarity with the phenomena (as a participant myself) to determine their meaning, in an act of fusion of the researcher's situation and the phenomena (Dilthey, 1990). Through the lens of an interpretive paradigm, I examined my own experience in the CCC ID lab in parallel to the point of view of the subjects in my study. I was concerned with capturing a *subjective reality* through a prolonged process of interaction, first as participant myself, and then later as I read the texts.

One of the participants (F4) commented on using her observing ego in a work context, writing: 'I did not use a rigid, structured interview in order to be able to standardize my answers, but [decided] to go for free floating attention and listen carefully.' Similarly, my approach to delving deeper was to apply, as I read, the art of listening, not directing my notice to anything in particular and maintaining the same 'evenly suspended attention' in the face of all that I came across (Van de Loo, 2007, p.230).

Reading the narrative arcs of the six case studies, I felt not as if I was being told an interpretation or recreation of events, but as if I was living through the events with the participant, in a tranquil and private world that contained only the two of us. These were tragic-comic tales told using words not common in a business school classroom: confusion, catharsis, surprise, anger, pain, fear, disillusionment, discoveries. Ashamed, worthless. Autonomy, hope, freedom. Delight, a lifting of heavy burdens. Acceptance. Serenity, honesty, transparency.

I listened with my third ear, and not only to my partner in this intimate journey, but also to my own emotions. Over and over, as I read through the six cases in a series, I would have real and sometimes even disturbing sensations of sadness, frustration, tension or stuckness. Occasionally, I found myself skimming through the first few case studies in a series, feeling somewhat detached or even bored. In the next, or middle cases, I would sense a tension building up, as if the writer had more to say but was not ready or willing to express it. Then in the last cases, perhaps case 5 or maybe not even until case 6, there would be a dramatic change as the writer turned away from a structured, rigid writing style toward a free flowing exploration of deeply personal issues. Although quite often there was no clear cut, narrative conclusion, I had feeling of relief, and I realized I had been waiting for and even desiring that denouement.

In other instances, after reading case 5 or 6, in which the tone changed or the participant wrote about feeling relieved, unstuck,

or happy, or maybe even still confused but optimistic about the future, I would find myself in a state that felt almost euphoric, as if I had lived through the long year that led him or her to this state of grace and resolution *inside his or her head*. The authenticity of the sensations (sadness, fear, boredom, frustration, relief, optimism ...) that I picked up from reading the six written texts as a fully developed story, are, I believe, a piece of evidence that suggests that the case reports allowed me to enter at least to some degree into the experiential world of the participants. In some cases, I watched as identity experimentation took place on stage. Other times, it was like watching kabuki theatre, or simply hearing 'voices off'.

Some of the participants had a similar writing style all the way through, showing either a high level of poised, calm reflection on self and context from the beginning, or an energetic self-analysis from page one. In many cases there was self-reported evidence of identity work, that is, people wrote about new projects they had designed, or a new working identity they were considering. For some, there was a dramatic tipping point when they switched from a typical business case study to a deeper level of self reflection. A few even completely changed their writing 'voice' in later case studies, as if a new identity was emerging without their being fully aware of, or in control of, this phase of identity exploration.

What struck me as I read the case series was that, taken as one narrative, they had a real and coherent logic. I had not predicted, even after re-reading my own case series, that what appeared to be a collection of six random essays about individual insights and events would turn out to be one story – not rewritten or reframed as an explanatory narrative in retrospect, but a true, complete narrative in and of itself. Many cases circled deeper and deeper around one meta-theme, as people looked for identities that they had somehow lost or had never fully understood. The unifying narrative theme of these stories seemed to be to search for, or to *rediscover*, one's true self.

For the most part, cases 1 and 2 were the introductions or prologues, taking the form of typical business cases with varying degrees of linking theories to practice. Case 3, which followed the module on family systems and family business, seemed to take people deeper, where doubts and fears lay. Defences (in some cases) began to break down, or (in other cases) were reinforced. As F2-3 wrote: 'This case was very difficult for me to write and that's why it probably took so long. It still doesn't feel to me as a case, but rather a collection of reflections. The topics mentioned are touching the core of my personality and thus are extremely difficult to work with.' The 'low point' typically began here as people felt that they were prisoners of their past. Cases 4 and 5 were quite diverse, but almost all demonstrated or reported some evidence of identity experimentation. Case 6 was often what I thought of as the 'epilogue or denouement' for most, as they consciously ended their story and talked about their (specific or open-ended) plans for the future.

The cases of M15, who is a lawyer, were particularly reflective. His first case was a free flowing but introspective case about listening and family history.

'During one of the exercises, it became clear that I think in terms of solutions. I hardly gave the other person an opportunity to tell his story. How did I develop this behaviour? I grew up in an entrepreneurial family, the second son in a family of five children ...'

In his second case, M15 begins to think more deeply about the irrational reasons behind human behaviour; and the theme of *illusion* comes to the fore:

'What moves a human being? What is the reason for behaviour and reactions? In this case I describe a number of situations which lead to the conclusion: the illusions of life. It is a confrontation with myself, and very sobering.'

In case 3, M15 picks up the theme of his family again:

'During module 3 it became clear that my personal, lifelong battle to change my

family structures is not realistic and, therefore, a waste of energy. But what is more important: I can change myself.'

In case 4, M15 reflects on his 360° leadership behaviour survey feedback. Here again, he mulls over illusion and reality. He brings up a new theme: 'Why do I care about other people's opinions?' Then in case 5, M15 reports that he has 'broken through a wall' and now feels free to be his true self, even though this would have a considerable impact on both his professional and personal identity. 'I have lost an illusion and I have come another step closer to myself.' In case 6, he confirms that the programme itself has been a significant catalyst of his new way of thinking about himself. 'The CCC programme has given me insight into what it takes to come closer to your true self. I am no longer attached to the truths of others.' At the end of case 6, he brings closure to his theme of illusion:

'We are not captured in the iron grip of the past. We are captured in the iron grip of the illusion that we have to protect ourselves from what has happened in the past. When we experience the present like it really is, it is surprisingly unburdened most of the time.'

Another person, M20, had a very different style and approach. His level of self reflection was subtle and played out on a larger stage. His first paper is a formal case study about the clinical paradigm, and how he might apply it to his executive team. In case 2, M20 writes at length about leadership in his organization. Case 3 begins as a formal report on his interest in strategy, and its application to family business; once again, there is little evidence of personal reflection. In case 4, however, it is clear that a tipping point has occurred. The title of case 4 'Leadership, power, rank and authority, and the collusions of my competing commitments' pulls the themes of the previous cases together and brings them to a very personal level. In the opening lines of the case M20 writes:

'These themes crystallised to become very clear messages for me to work with.'

I was surprised how much the feedback from module four affected me this time. It was as if the time was ripe to really do more about it.'

For M20, understanding begins to emerge in case five. He writes about marginalization of people, communities and nations, and describes the recent history of his own country. In closing case 5, he writes:

'Strangely, when I started to write this case paper I thought I could communicate some elements about marginalisation and of my own people's plight and struggle in being marginalised. I'm not sure I succeeded and I don't actually care anymore. Through this paper I was coming to terms with my own past, trying to understand it.'

Case 6 brings M20 closure, as he connects his national heritage with his reservations about leadership:

'Writing this paper helped me deal with my heritage and identity. It was painful, yet it was immensely satisfying. When it was finished, I felt relieved, peaceful, whole and thankful. It was a cathartic experience and a work of reconciliation and integration.'

A narrative of a future self

As I read the case series, I had the perception that the individuals had been writing chapters in a narrative of their future selves, informed somehow by a deeper, subconscious source that connected it all together before the individual was able to articulate it as one story. In other words, the cases were not presented to me, the researcher, as a narrative that described or validated an identity change. The cases were simply class homework assignments – supposedly. But they were not simply an exercise in sense-making but rather, observed at a meta-level, an exercise in unmaking elements of the writers' identities that they now believed to be non-sense – the no-longer authentic patterns imposed upon them by the figures in their inner theatre.

There were outliers among the writers. Some seemed to have an inherently greater self awareness, or were more able to control their defensive reactions, or had a stronger motivation to enter the ID lab earlier on (losing a job or strong desire to change careers), and this was apparent even in cases 1 and 2 – they never wrote typical business cases. A few cases showed evidence of other kinds of tipping points earlier than most for various reasons (one person lost her wedding ring after module 2). A few people did not write one or more cases at all, which is of course silent but eloquent information as well. At the other extreme, a few case sets remained at cognitive, 'reported' level until case 6, but it was possible to feel tension building from case to subsequent case as I read between the lines. Here, people who had written thoughtful but very focused and structured reports ('on task' in terms of the original assignment) 'suddenly' had a complete change of writing style and topic in case 6 – the hand on the doorknob effect – sometimes, as they admitted, after hard pushing from their small group peers. This usually took the form of a peer saying: 'Who are you really?'

In some cases it was possible to tell almost from the beginning what the person was searching for: emotional freedom and expression; freedom from rigor; freedom from certain responsibilities; an exploration of rank and power – these themes would be repeated over and over again in different forms, as the writer looked both forward and backward in subsequent cases. Sometimes people wrote very movingly about exploring or recovering a part of themselves that had been lost or hurt when they were younger – F8-2 wrote: 'His words felt like sharp knives and the look in his eyes made me feel a pain similar to the pain I remembered feeling when my mother verbally punished me for not living up to her expectations during childhood. I felt attacked, ashamed and worthless. Not being good enough, not doing what was expected from me.' And like F8, later write about ways to find resolution:

'The intention of my life, in this present moment, has to do with living my identity. And by doing so, the intention is to assist others in living theirs. It is about inspiring and helping others, both individuals and organizations in understanding and in living their authentic identity' (F8-4).

To summarize, the six case studies in each series gave me six snapshots of the way people were perceiving and experiencing their time in the ID lab. The meaning that emerged case by case often became understanding in retrospect, when the cases were reframed as one set of evolving ideas. As McAdams et al. observe: 'sometimes there is an awareness of a state of being in the transition. At other times, people are unaware of having undergone a time of change until they look back and see that they and their lives are inexorably changed. They may wonder, 'how did I get here?' (2001, p.xvi). The cases series, read at a meta-level, help to answer the question of how the participants 'got there' – even though 'there' was of course a very individual point of reference.

At the same time, I was sensitive to the fact that just because I did not see dramatic evidence of ID experimentation, this did not prove that it had not occurred. Yalom cautions: 'Keep in mind that it is the subjective aspect of self-disclosure that is truly important. ... What appears to be minor self-disclosure may be the very first time [a person has] shared this material with anyone. The context of each individual's disclosure is essential in understanding its significance' (p. 131). This is where having access to the full case series was also valuable. For example, when in case 5, M16 wrote: 'even the writer himself may be 'stuck' in a number of other ways' I considered this, in context, as a subtle but significant self-disclosure.

The lab report

As Korotov predicts in his model of ID laboratories, I also found increasing examples in the case studies of surprise, confusion and defensiveness after modules 1 to 3. The cases

that followed modules 4 and 5 reported and/or demonstrated ID experimentation, with many mentions of the importance of the peer group. Case 6 typifies the termination or stepping out experience. In addition, I noticed two turning points in terms of narrative orientation: the first most typically in case 3 from 'external, present' to 'internal, past'; and the second typically in case 6, from 'internal, past' to 'external, future.'

Comparing the emergence of themes in these narratives to a framework of group psychotherapy gives us a further indication that the CCC programme modules/ intervention phases have successfully integrated an epigenic group psychotherapy process, and they have a similar direct influence on participants. People were indeed moving through epigenic stages in their small groups: (1) initial member engagement and affiliation; (2) focus on control, power, status, competition, and individual differentiation; (3) a long, productive working phase marked by intimacy, engagement, and genuine cohesion; (4) termination of the group experience (Yalom, 2005). It also appears from reading the case packages that there is a secondary epigenic *narrative* process that takes place during the programme: (1) prologue; (2) introduction – focus on external, present; (3) identity dilemmas – focus on internal, past; (4) identity exploration and experimentation – internal focus on reframing past and future; (5) consolidation and denouement – focus on external, future. Most significantly, there seems to be some relationship between *not developing* through the epigenic phases of writing cases in parallel to the development of the group psychotherapy progression from module to module, and *stuckness* in terms of epigenic progression through the ID lab (see Figure 2, below).

Although the case papers indicate individuals move through these phases at a different rate, the narratives show that for most people identity experimentation begins after the fourth module. However, it

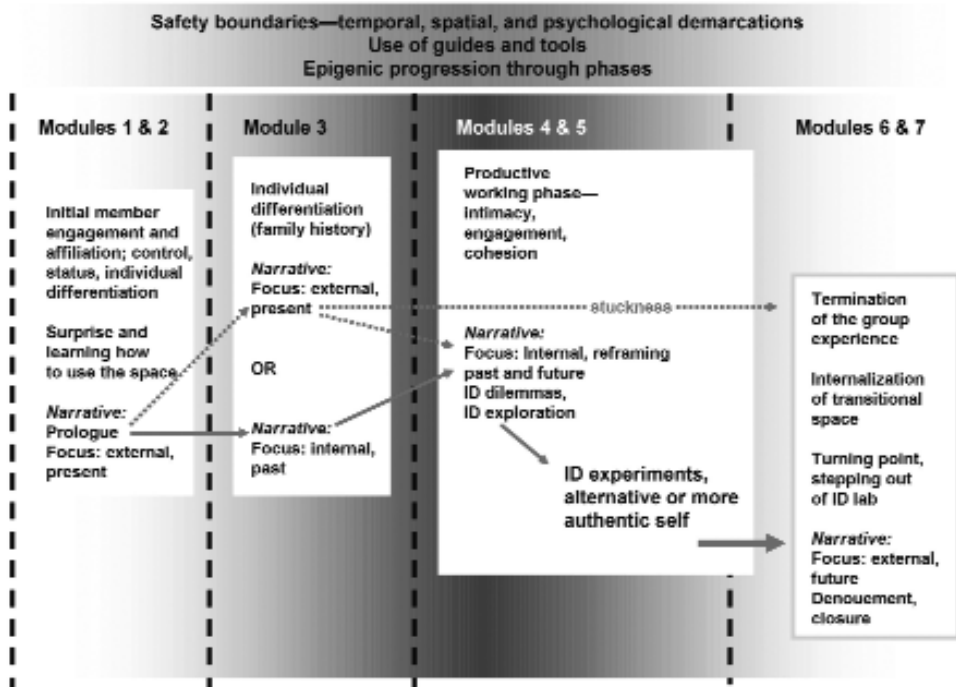
appears that the groundwork for the deep change which occurs in modules 4 and 5 is laid in modules 1 and 2, with an intensification in module 3. For some participants, experimentation does not begin until module 6. This suggests that longer, multi-module executive development programmes are well-suited to identity transition.

Peer support and feedback is reported and demonstrated to be a key factor in identity experimentation. For most participants, the obligation to write a case study to be read by a small, trusted group of peer coaches seems to prompt, reinforce, and enhance experimentation in the ID lab. Participants themselves describe cause and effect relationships between their own tipping points and: (1) module contents; (2) insights that emerge while writing cases; and (3) peer feedback. This implies that laying the groundwork to train participants to be effective peer coaches in the first modules is worth the time and effort.

The texts also show evidence of internalization. If internalization is said to occur when people accept the influence of a change situation, environment, or other individuals because the content of this change and the ideas and actions behind it are seen as intrinsically rewarding, congruent with one's value system, and useful to meeting one's needs (Korotov, 2005), then, based on an evaluation of the themes in their papers, we can conclude that internalization of behavioural change is indeed occurring for many participants inside the CCC ID lab. In addition, because there is solid evidence that people are progressing through an epigenic psychodynamic process of group therapy in CCC, we can posit that this will also correlate significantly with enhanced productivity and achievement.

For triangulation, this paper and my findings were presented to the November, 2008, CCC alumni conference. The audience

Figure 2: Inside a multi-module leadership development ID lab.



included approximately 60 CCC alumni, about one-third of whom were included in my research. The findings and my ID lab model (Figure 2) were well received, with the group expressing a high degree of confirmation.

Future research

This brings us inevitably to a question that cannot be side-stepped: what do we mean by enhanced productivity and achievement in the context of executive leadership development programmes? It would be interesting to conduct a content analysis of the CCC programme texts that would test the thematic interpretations in this exploratory paper – and search there for evidence of drivers such as desires for affiliation, power and achievement that would deepen our understanding of the motivational levers that support identity work and sustainable behavioural change. This may have some relevance to studies on motivation to lead, and whether or not this affects willingness to embark on identity transition. Further, a content analysis might show that the ID lab experience directly results in a development of self-awareness, self-efficacy, increased emotional intelligence, and team orientation, as this current exploratory study suggests it does. A test-retest quantitative longitudinal study could be conducted, using the same 360° leadership behaviour survey that this sample of CCC participants completed. This retest study could be compared to a test-retest study of a group of similar executives going through a leadership development programme that did not have a clinical orientation. Linking the results of these studies to the emotional intelligence research stream, these studies might show that increased emotional intelligence implies better emotional capabilities, and leads to transformational leadership.

Limitations

On the one hand, this study is like an archaeological reconstruction: it is possible from studying bits and pieces of people's lives to

understand them a little better, but much of their social environment can never be known. On the other hand, as a researcher exploring the CCC ID lab, I had the advantage of knowing the context intimately, since I was also a participant and went through the same process of case writing as did the other participants. Therein lies both a strength and a weakness: I have undoubtedly projected some of my own realities into what I read. To draw richer insights from the shards of pottery I have collected, a content analysis should be done and triangulated.

After this meta-level exploration of the 161 case studies, the only conclusion that can be proved is that, for most participants, some degree of self-reflection, and indications of identity exploration and experimentation, can be found in their written case studies. However, we cannot draw the opposing conclusion, that is, if there is no written evidence of experimentation, then this must mean that no experimentation took place. Similarly, although a tipping point may not be apparent in the arc of a person's six written case papers, nevertheless it may well have happened.

I did not have a 100 per cent participation rate and I did not ask for reasons from the people who did not wish to participate. One person offered the reason that the sooner his cases were forgotten, the better. However, even if we conservatively assume that the non-participants never entered and played in the ID lab (which I intuitively do not believe to be true), *all* of the participants in my sample report or demonstrate change in their case papers. Also, the very diverse spectrum of case writing styles, from classic business case to free flowing personal reflection, indicates that there was not really an issue of self-selection that prompted people to share their cases with me. On the contrary, I felt an extremely high level of trust among the group as manifested by their willingness to allow me to read papers in which they often expressed self doubts and very private family matters.

A final word on the act of writing

For many participants, talking over their case with peers was a real call to reflection and action – writing + discussion proves to be a very effective way to engage the powerful forces of peer groups. The cases also served as ‘objects’ that connected group members, and helped to maintain those connections. For example, the group conference calls were often followed by informal telephone calls among specific group members who wanted to elaborate on a point or ask further questions about the case study. In addition, group members would also send their case studies for comments to other participants who were no longer, or never had been, in their current peer coaching group.

The tremendous importance of the reiterative process of writing in the here-and-now about identity experiments, and then discussing the case with trusted peers after each module, is an element of leadership development programmes that has possibly been underestimated. In their case studies, participants were not *polishing* identity narratives, they were *capturing* emerging narratives. These stories were often very surprising even to the writer. The act of writing the cases seemed to force people to think about themselves more deeply, and over a much longer period of time, than they ordinarily would do in our sound-bite, elevator-talk world.

Surprise, surprise – it turns out that the writing process in and of itself plays a critical role behind the scenes in the identity lab! Writing – something, anything – for most people seemed to be a key pathway for emotion to emerge and be reframed or transformed into something actionable

through exactly the process Loewenbourg (2000) described; a longitudinal repetition in mode or content of themes indicated a *latent unconscious scenario* that, for many CCC participants, was indeed heard and interpreted. In other words, it seemed that they *already knew*, at a subconscious level, who they wanted to be, and where they wanted to go. But this reality emerged slowly, and piece by piece, through a long and sometimes painful process of internal detective work, shaped by feedback from guiding figures. The new identities were not a *result* of the narratives, they already existed. As M23 wrote: ‘Odysseus is you. And me. We all make his voyage, we travel from life to life, experience to experience. We taste the sweet fruit of Lotus, ease into the oblivion of the Sirens, struggle between Scylla and Charividi, with nostalgia. But at last we return to our real home.’

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Linking MBA learning and leadership coaching

Barbara Wood & Sandy Gordon

This paper describes a five-day intensive leadership coaching course that was recently introduced as an Advanced Topic in Management within the Master of Business Administration (MBA) program offered by The University of Western Australia (UWA) Business School. The unit was designed specifically for those students nearing the completion of their MBA studies and curious about coaching and its ability to bring about individual and organisational transformation. In addition to summarising the course outline, including learning outcomes, teaching and learning strategies, unit delivery and means of assessment, both qualitative and quantitative course evaluation feedback data from students enrolled in 2007 (N=40) and 2008 (N=40) are presented. Results indicated that leadership coaching students expressed a strengthened belief in their coaching skills in response to taking the unit.

Keywords: leadership coaching, talent management, coaching culture, applied positive psychology.

THE CASE for Leadership Coaching is compelling as it is evident that 21st century businesses need leaders at all levels and from all backgrounds (Clutterbuck, 2007; Hunt, & Weintraub, 2007; Jarvis, Lane, & Fillery-Travis, 2006; Megginson & Clutterbuck, 2005). Budget cuts over the past decade, which have stripped layers of management from some public-sector behemoths and private companies – who nevertheless need to operate efficiently and effectively – now need leadership at levels where it might not have been necessary. In addition, some people are now being put into complex management situations that they are ill-prepared for and old methods of leadership by intimidation and top-down command chains have become increasingly ineffective. The bottom line requirement for post-modern organizations, companies and communities is that leadership be a coachable skill.

Several researchers (e.g. Berman & Bradt, 2006; Fillery-Travis & Lane, 2006; Jones & Spooner, 2006; Paige, 2002; Reiss, 2004; Stevens, 2005) and authors (e.g. Bluckert, 2006; Bushe, 2001; Harkavy, 2007; Grant & Greene, 2005; Zeus & Skiffington, 2006) have examined the efficacy of leader-

ship and coaching at work including Underhill, McAnally and Koriath (2007) who suggested that the 'evolution of coaching requires organisations to link coaching to their leadership development and talent management goals' (p.29). Coaching connects both the *who* (talented employees) and the *how* (leadership development) with organisational goals and strategies. Clutterbuck and Megginson (2005) also believe that coaching-at-work has 'come of age' and that coaching makes a significant contribution to the business of organisations. They defined a coaching culture as one where 'coaching is the predominant style of managing and working together, and where a commitment to grow the organisation is embedded in a parallel commitment to grow the people in the organisation' (p.19). Importantly, coaching styles of leadership are also being associated with the retention and management of talented people (Goffee & Jones, 2007; Robertson & Abbey, 2003).

The specific elective unit that is the focus of this manuscript was first prepared in 2007 in response to requests by Master of Business Administration (MBA) students at The University of Western Australia (UWA) for the provision of a leadership coaching

course. The UWA Business School had also been exploring a collection of advanced units, which were allocated to the MBA leadership specialisation and which could be undertaken by students pursuing a Masters in Leadership. Planning the unit involved careful examination of how coach education was offered at other Australian Institutions. Subsequently, an intensive format was designed to investigate both the art and science of coaching, and selected activities were chosen to challenge students when applying this new knowledge in their own coaching leadership practice.

Aims

The general aim of the unit was to introduce students to appropriate theoretical and conceptual frameworks of coaching practice, in combination with strong analytical skills to practically apply this understanding in relevant organisational circumstances. The specific intent of the courses taught in 2007 and 2008 was to enhance students' skills necessary to influence other people as well as make changes in their own work life. Using evidenced-based theory, students explored why coaching provides an opportunity for change and how their own coaching abilities can be enhanced. Students learned how the development and promotion of coaching skills can complement and strengthen leadership capacity and organisational strategies.

Learning outcomes

The following general learning outcomes for students were identified:

1. Develop an understanding of the theoretical basis of evidence-based coaching and understand that leadership coaching is a valuable tool for making positive and purposeful change.
2. Identify the skills needed to be an effective leadership coach in a variety of applications and feel comfortable both in self-coaching and peer-coaching activities.

3. Be able to conceptualise coaching within a solution-focused framework and understand coaching practice in relation to the student's own life experience.
4. Acquire sound practical skills through supervised practice with expert coaches and receive detailed feedback and assessment of their coaching skills.
5. Understand the requirements for effectively giving and receiving feedback and use wide-ranging conceptual coaching frameworks, models and skills to facilitate effective goal setting strategies.
6. Experience personal development and change by completing a personal coaching skills development plan.
7. Appreciate the complex processes involved in using coaching with teams.
8. Understand coaching practice as an effective stress management technique in organisations and apply self-coaching strategies to the student's own life experience.

Teaching and learning strategies

A variety of teaching and learning strategies were used in the implementation of the unit. These included:

1. Adult learning principles, which were integrated into the curriculum with action learning opportunities regularly available within class activities in the form of coaching demonstrations, role playing sessions and in-class presentations.
2. Wide ranging, multi-faceted coaching frameworks and techniques, which were introduced to enable students to select the strategies that best worked for them.
3. Local coaching experts ($N=5$), who debated coaching in a panel discussion, were regularly used in classes to integrate their knowledge and skills for students. They also supervised coaching role plays. Regardless of their starting point in the course, co-learning experiences such as experiential in-class activities in active listening, exploring moment of choice options, and practice in giving and receiving feedback

were intended to encourage students to reflect on and apply new ways of accomplishing their goals. MBA student feedback at UWA has consistently reinforced the need for units to provide 'real life' and pragmatic examples, subsequently coaching experts were integrated within classes, and wide ranging coaching activities were used to explore coaching concepts and practices. Experiential learning components, such as peer role play coaching or oral responses to case studies, were used to evaluate topics relative to the students' personal and organisational experiences. Each day was intended to balance conceptual and theoretical comprehension along with practical implementation.

Unit delivery

The leadership coaching unit deliberately leveraged off the work-related experience of students. It used prominent coaching theory to help managers make sense of their experience prompting thoughtful reflection and the sharing of competencies that encouraged students to raise their consciousness about their practice. Research (Dart & Clarke, 1991) has suggested that students in experiential courses demonstrated deeper levels of understanding and meaningful application than students in conventional units.

The course was delivered over five intensive days of classroom contact. Two x two consecutive day (Saturday/Sunday) periods were used in content delivery for the first four days with a two-week break between these two periods. Day Five occurred one month after Day Four. Each day was themed around a predominant topic and students were expected to complete required course reading for each day of class. Table 1 summarises topics and learning outcomes for each day.

Required course readings were posted on a unit WebCT6 website, which also hosted versions of the following documents used in various assessment activities in the class: *Framework to Guide your Coaching Session*; *Observer Feedback Sheet*; *Coaching Pre-Session Preparation Sheet*; *Coachee Learning Journal*; *Coach Self-Assessment*.

Day One

On Day One, students were exposed to the benefits of coaching, specifically addressing ideas around making personal and professional change. Through a values exercise students were required to select their five key personally held values. A model was described to illustrate the interrelationships between unconscious core beliefs, values/beliefs, thoughts/emotions and behaviors specifically when facing challenging experiences. In-class videos were used to exemplify how the model plays out for others. A choice framework was used to reinforce the need for selecting proactive and purposeful responses to work challenges. Students were then asked to evaluate their perceived ability to face and respond to organisational change in their current (or most recent) employment experience.

The afternoon was allocated to the key ingredients of solution-focused coaching (Berg & Szabo, 2005; Greene & Grant, 2003) and the GROW model (Whitmore, 2003) with specific emphasis on listening abilities and building quality conversations. Targeted listening exercises which blossomed into coaching conversations were used within class to develop an appreciation of coaching. The interrelationships of coaching to mentoring, training, counseling and consulting were also discussed.

At the conclusion of Day One, students were asked to become familiar with the biographies of five expert coaches attending class the following morning to debate and discuss the benefits of different frameworks used in coaching.

Day Two

A full morning was allocated to a panel discussion among five coaching experts who initially received questions from the class facilitator and then directly from students. The conversation focused on three key areas:

1. Anecdotal accounts of the benefits derived from coaching experiences for individuals, teams and organisations.

Table 1: Topics and learning outcomes for each day.

<p>Day One</p> <p><i>Topics:</i></p> <ul style="list-style-type: none">● Introduction to Coaching● Action Learning Model● Solution – Focused Approach● Mental Models and House of Change● Coaching as a Leadership Capability <p><i>Learning Outcomes</i></p> <ul style="list-style-type: none">● Exploring the fundamentals of coaching● Developing a foundation for sound contemporary coaching practice.● Investigating the solution focused approach in coaching● Distinguishing between remedial, reactive and proactive coaching● Considering the “House and Change”● Understanding Coaching as a Leadership Capability <p>Day Two</p> <p><i>Topics</i></p> <ul style="list-style-type: none">● Panel Debate● Goal Setting Strategies● Structuring the Coaching Session● Basic and Advanced Questioning● Feedback Bridge <p><i>Learning Outcomes</i></p> <ul style="list-style-type: none">● Exploring coaching strategies in relation to common applications of coaching workplace coaching, executive coaching, health and personal/life coaching● Considering effective goal setting strategies● Identifying the key components of a coaching session● Practicing effective questioning skills <p>Day Three</p> <p><i>Topics</i></p> <ul style="list-style-type: none">● Coaching Role Plays with the Expert Coaching Panel● Giving and Receiving Feedback● Coaching and the Stages of Change● Transtheoretical Model <p><i>Learning Outcomes</i></p> <ul style="list-style-type: none">● Practicing coaching through small group coaching role-plays● Recognising remedial, reactive and proactive issues● Exploring the Stages of Change and how to build commitment● Using Stage-Specific Tactics to foster change
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Table 1: Topics and learning outcomes for each day (*continued*).

<p>Day Four</p> <p><i>Topics</i></p> <ul style="list-style-type: none"> ● Corridor Coaching ● Coaching as a Tool for Stress Management ● Complexity and Coaching in Organisations <p><i>Learning Outcomes</i></p> <ul style="list-style-type: none"> ● Recognising your own feedback barriers ● Implementing a structured feedback process ● Using feedback as a platform for collaborative coaching ● Understanding coaching techniques in the corridor ● Considering coaching as a stress management mechanism ● Learning how coaching can be a useful tool for encouraging team effectiveness <p>Day Five</p> <p><i>Topics</i></p> <ul style="list-style-type: none"> ● The Future of Coaching for you ● What do you need to strengthen in your future coaching ● Appreciative Inquiry ● Open Space Facilitation ● Developing a Coaching Plan for you <p><i>Learning Outcomes</i></p> <ul style="list-style-type: none"> ● Recognising your own coaching barriers ● Appreciating what you need to do “more of” in your coaching ● Understanding what you need to do “less of” in your coaching ● Describing how you will use coaching in your future work life ● Defining a future coaching plan for you
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2. How coaching contributed to wide ranging developmental areas such as health, exercise/sport, business/workplace, career development, and executive development.
3. An indication on how coaches have responded to unique challenges such as cross cultural coaching, stress management practices, and lack of motivation on the part of the coachee.

Student feedback each year from the panel debate was overwhelmingly positive. Despite the student’s relative lack of coaching experience, the debate provided an excellent opportunity to observe how coaches become passionate about the opportunities and benefits of coaching. The expert coaches, many of whom had more than 18 years’

experience, discussed topics very well together and built on each others ideas. It is uncommon for coaches from wide ranging areas and independent organisations to unite and share coaching experiences.

The afternoon of Day Two considered the needs of goal setting both individually and organisationally and the opportunities that coaching offers in encouraging goal attainment. A letter from the future exercise was used to illustrate the need for fuzzy vision and SMART goals. Targeted exercises were used in developing sound questions through the use of a questioning matrix. The use of a feedback bridge was exemplified in the final exercise in preparation for the role playing activities scheduled for Day Three. Students undertook a coaching conversation

with a coachee and topic of their choosing. The GROW model framework was provided to guide them in this coaching session.

Day Three

The morning session of Day Three was a coach role play activity. Students worked in small groups with an expert coach from the panel discussion (Day Two). Predominantly the role play was designed for each student to complete a coaching session with one coachee in the presence of the other students and the expert coach. Student observers and the expert coach provided feedback on the session. A feedback form provided a framework for the feedback. The role play activity provided students with practice in coaching and because the environment was safe and students were becoming skilled in providing feedback, the role plays were identified as helpful and thought-provoking.

The afternoon targeted a stages of change matrix with an emphasis on how a coach can shift the perception of the coachee by helping them to identify the pros and cons of change. The key components of positive psychology coaching (Biswas-Deiner & Dean, 2007) were introduced as a means of preparing students for making change within their own personal and professional life.

Day Four

There were two principle themes to the Day Four programme. First, embedding coaching within the organisation (Hunt & Weintraub, 2007) and, second, considering how positive psychology can enhance coaching practice (Biswas-Deiner & Dean, 2007). The case study method was used to support skill development in embedding coaching within an organisational setting. The Boots pharmacy (UK) formed the basis of the case study and students presented their responses to a series of questions to a three person academic panel. Feedback on each presentation was prepared in sequence.

Day Five

The programme for Day Five deviated from earlier curriculum in that it was intended to unify developing coaching skills in the student through the use of Appreciative Inquiry (Cooperrider, Whitney & Stavros, 2008) and Open Space Technology (Owen, 2008). Scheduled a full month after Day Four and held at an inspirational location off-campus, students were informed that the format would include a celebration of significant leadership development to date and to offer students an opportunity to focus on and discuss specific self-development areas.

The morning of Day Five utilized an appreciative inquiry interview guide (Ludema, Whitney, Mohr & Griffin, 2003) where students engaged in a conversation with a partner identifying significant leadership successes achieved through coaching to date. Pairs then joined small groups at tables to identify key themes and creative expressions symbolizing overarching common messages. Students expressed themselves in songs, skits, poems and presentations. This led into an afternoon, three-hour open space session that was guided by the question 'What do you need to focus on to achieve ongoing improvements in your coaching skill development and how will you support yourself in this ongoing growth?' Students prepared a one-page coaching skill development plan at the conclusion of the open space technology session. This plan formed the basis of their fourth assessment.

Assessment components and class activities

Four pieces of assessment were used to evaluate students within the class and each assessment focused on an aspect of coaching skill development that included both individual and team oriented activities. Each assessment was briefly described to students as follows:

Assessment No. 1:

Summary of a Coaching Session

Aim: To practice and apply the basic skills of coaching by undertaking a coaching session with a work colleague or another individual.

Method: Identify a work colleague or another individual with whom you plan to have a 45- to 60-minute coaching session. Use the GROW model as the framework for your session and for completing the write up of the experience. The summary (up to 500 words) need not follow a specific format, however, it should include at least three specific references to the coaching literature

and the questions that you used in your coaching session. Your reflections on the following should be highlighted:

1. What happened in the coaching session?
2. What influenced the outcomes of the coaching session (e.g. did the discussion from Day 1 or Day 2 impact your coaching style)?
3. What would you change in your next coaching session?
4. What did you learn about your own coaching style?

The paper will be assessed using the following guidelines.

Assessment No. 1 Criteria	HD 80-100%	D 70-79%	CR 60-69%	P 50-59%	Fail ≤49%
What evidence is there that the student has read widely about coaching prior to undertaking this coaching session?					
Did the student critically integrate the literature on the subject or merely restate it?					
How clearly has the student presented the information in a logical and readable fashion?					
Is it clear what the student would do at the next coaching session?					
Are the statements on 'lessons learned' understandable?					
Was the paper written well with neither spelling nor grammatical errors?					

Assessment No. 2:

Feedback from a Coaching role play

While this activity was not formally assessed, observations from the expert coach were forwarded to the facilitator and contributed to the student's classroom participation grade.

Aim: To encourage students to skillfully use feedback from their peers and expert coach.

Method: On Day Three of the coaching unit, you will participate in a coaching role play under the guidance of your expert coach. Students in pairs will conduct a coaching session with one student designated as the coach and the other as the coachee. Each session will run for up to 20 minutes with additional time allocated to the debrief. The GROW model (used in the first assignment) can guide you in your coaching session. You are encouraged to integrate questions and techniques that were effective for you in Assessment No. 1. To prepare for Day Three, you may also wish to consider additional scoping questions to assist you in your role as coach.

Examples of Coaching Scoping Questions may include:

- When do you feel that you perform best as a manager/leader/worker...?
- What have you accomplished that you are most proud of?
- What do you do to remain renewed, energised, enthusiastic and inspired in your work?
- What people, situation or area of life is consuming your attention and energy right now?
- What relationships would you most like to create, nurture or celebrate?
- What do others most appreciate about you?
- What opportunities do you need to take advantage of?
- What will you use to measure the effectiveness of this coaching session?
- What is the professional vision you would most wish to realise?

- What do you want to leave for your successor?

These coaching role plays will occur in groups. Those not involved as coach or coachee in the session, will be observers and will use the observer feedback form to provide debrief material and information for the coach.

The purpose of this activity is to give you the opportunity to receive feedback on your own coaching abilities and to give you an opportunity as an observer to provide comments to other coaches. To develop your own coaching, you may wish to consider responses to the following types of questions:

- What does the feedback from others suggest about my coaching style?
- Were there any consistencies and inconsistencies in the feedback received?
- Were there any extenuating circumstances in the coaching session that influenced the outcome?
- How could I improve my coaching in future?
- Based on the feedback, what am I prepared to do to improve my coaching?
- What journal articles or books could help me to better understand the feedback that I have received in this coaching session?

Assessment No. 3:

Peer Coaching Report

Aim: To further develop your coaching skills by undertaking peer coaching sessions.

Method: Identify a team of three or four students with whom you will complete the peer coaching project. Each session should have one student acting as the coach, another student acting as the coachee and the remaining student(s) are the observer(s). The observer(s) should use the feedback framework already developed in previous assessments. Each student should act as coach for at least two sessions with the same coachee. For each session, the coach should complete a:

- a. Pre-session plan. Please spend some time with your coachee prior to each session to best prepare yourself;
- b. Coachee learning journal; and
- c. Follow-up session report, which includes the feedback comments from the observers.

It is recommended that you use the GROW model and appropriate coach scoping questions to shape each session. As you complete your peer coaching report you may wish to integrate some of your findings from the coaching role play summary from Assessment No. 2.

The submission for Assessment No. 3 will be a series of separate reports completed by each coach and clearly separated with a title page for each coach including the word count for that section of the paper. For each coaching session, the coach should summarise their use of the pre-session plan, personal observations of the coaching session including the effectiveness of the coachee in completing their log, a summary of the observer feedback, a personal assessment of coaching performance and a concluding section reflecting on:

- What worked well in your two (or more) coaching sessions?
- What areas could lead to further improvement and how will you plan to improve on these areas for future coaching sessions?

The paper should be written in essay format with minimal use of dot point lists. There should be evidence that the paper has embraced appropriate literature to guide the coach in their sessions. Pre-session plans, observer feedback forms, coachee completion logs may be included in appendices for each coachee. Sections for each coach in your group should not exceed 1500 words.

Optional inclusion: At the conclusion of the peer assessment period, you may wish to provide more general feedback to the coaches in your group both from the observer and coachee perspective. This information, if available, may be included in the final section of your peer coaching report. Each coach will receive a separate grade for their section of the overall paper, which will be assessed using the following guidelines:

Assessment No. 3 Criteria	HD 80-100%	D 70-79%	CR 60-69%	P 50-59%	Fail ≤49%
Is there evidence that the coach worked on their coaching pre-session plan, prior to each coaching session.					
Did the coach consider the information received from their observers and use it to change their style in latter sessions?					
Was there evidence that the coach was committed to each coaching session?					
Has the literature been effectively used by the coach in the report?					
How clearly has the student presented the information in a logical and readable fashion?					
Does the student have a clear perspective on what do to in future?					
Was the paper written well with neither spelling nor grammatical errors?					

Assessment No. 4:

Personal Coaching Skills Development Plan

Aims: First, to provide you with a framework in which you develop your future coaching development plan. Second, to use information from a variety of sources including your coaching role play on Day Three to develop a personal coaching skills development plan.

Method: In this assessment, please consider two or three personal goals that you wish to achieve in the next twelve month period. It is conceivable that you may wish to develop these plans in three, six, nine or 12 month periods if this is helpful to you. Clearly articulate these goals and identify a plausible action plan that will enable you to achieve these goals. While there is no specific framework for this plan you may wish to consider the following questions to identify your goals:

- What skills do you bring to coaching?
- What successes have you celebrated in your coaching skills to date?
- What vision do you have for your coaching skills in the next year?
- How would you like others to see you as a coach?

In designing your action plan, you may wish to think about these questions:

- What in your goal statement really makes you yearn for its fulfillment?
- What accomplishments would make you feel as though you have come close to your goal?

- What have you done previously that you could do again to move toward your future goal?
- What do you need to pay attention to, to make you feel supported that you are taking care of yourself as you embark on this journey?
- What are small actions that you would like turned into new habits?
- Who has supported you in identifying and achieving your goals and how do you show your gratitude and recognition?
- If you were to experiment with one aspect of your goal, what kinds of things would you see yourself trying?
- If you had achieved your goals, what kind of fun are you having?
- How will you continue to foster your own development?

The paper should consider two to three goals in coaching development and action plans for their attainment. The plan for achieving these goals should be carefully written in an essay format with only occasional use of dot points. You are free to use subheadings in a manner that easily guides the reader of your paper. Relevant literature that helped you to 'fine-tune' your coaching skills development plan should be included and appropriately referenced. Your submission should not exceed 2500 words and will be assessed using the following guidelines.

Assessment No. 4 Criteria	HD 80-100%	D 70-79%	CR 60-69%	P 50-59%	Fail ≤49%
What evidence is there that the student has read widely about personal development planning prior to writing up their plan?					
Did the student critically integrate the literature on the subject or merely restate it in the summary?					
Did the student consider the information received from the Day 3 Coaching Role Play in establishing their goals and action plans?					
How clearly has the student presented the information in a logical and readable fashion?					
How likely is it that the student will undertake this plan in the future (3, 6, 9 and 12 months)?					
Do the 'goal & action' statements acknowledge SMART principles (Specific, Measurable, Actionable, Realistic and Time bound)?					
Was the paper written well with neither spelling nor grammatical errors?					

Course evaluation

Course evaluation data was purposively gathered to test the impact of the unit on the learning of the students, and to specifically consider that learning within the context of their work as managers and contributors to business. Chia and Holt (2006) advocate that business school presenters

should develop and display their true 'scholarship' not so much in terms of the dispassionate, detached and objective dissemination of facts and knowledge but in terms of their own emotionally charged, rhetorical involvement and their imaginative capacity for capitalising on the transient, shifting and ambiguous classroom and experiential situations in the transmission of knowledge (p.472).

In addition, Mintzberg (2004) argued that truly successful and effective management education involves a combination of experi-

ence (craft), insight (art) and analysis (science). As such MBA programmes must encourage students to learn from their own experience, placing less emphasis solely on the science of management and building more of the craft and art of managing into the educational process. An underlying key is the idea of 'learning in action' where participants reflect and build on experience, rather than on artificial simulations created in the classroom. This explains the rationale for and significance of the data gathered and presented in the following.

Quantitative data: As the unit focused on personal skill delivery, theoretical understanding of leadership coaching and the utilisation of coaching as a tool for change within organisations, it was considered helpful to identify the level of experience of the student audience. To achieve this a pre-

unit assessment was used to evaluate how much coaching experience the students had prior to taking the unit and how often they used various coaching skills and techniques. The same inventory was used at the conclusion of the unit and subsequent pre- and post-unit data are illustrated in Table 2.

In addition, students in both years of the course were asked to reflect on and evaluate perceived changes in their personal effectiveness on performing specific coaching skills and techniques within their working environments in the two-month period following the course. These data are illustrated in Table 3.

Qualitative data: Table 4 describes the higher and lower order themes that emerged from a content analysis of student ($N=80$) written responses ($N=280$) regarding the overall impact of units delivered in 2007 and 2008. Several sub-themes were evident under the three main themes of communication, interpersonal skills and overall impact.

Taken together the data in Tables 2, 3 and 4 clearly indicate that students improved in their individual coaching capabilities. In addition, anecdotally, all students commented that the course should become a core unit. In comparison to other course offerings one student wrote 'This subject has had the greatest impact on me out of all the MBA subjects. I wish that it had been available earlier in the MBA programme, however, it could also feature as a wonderful finishing unit'.

Future directions

The leadership coaching course described in this paper is under review. While the current outline, including learning outcomes, teaching strategies and means of assessment have been favourably evaluated, both student feedback and observations of local coaching experts suggest that the programme could be augmented in the following two ways:

1. More integration of applied positive psychology principles by introducing other coaching models such as appreciative inquiry coaching (Gordon, 2008; Orem, Binkert & Clancy, 2007; Reed, 2007; Sloan & Canine, 2008), strengths-based coaching (Linley, 2008; Linley & Harrington, 2005, 2006; Pegg, 2008), as well as information on strengths-based leadership (Rath & Conchie, 2008), and organizations (Mohr, McKenna, Lee & Daykin, 2008).
2. More reference to building organisational coaching capability and infrastructures that might include peer coaching, coaching managers, and both external and internal expert coaching panels (Rock & Donde, 2008; Whybrow & Henderson, 2007). Hunt and Weintraub (2007) suggest that 'a coaching organisation makes effective and regular use of coaching as a means of promoting both individual development and organisational learning in the service of the organisation's larger goals' (p.15).

Summary

What has been presented is a basic outline of an attempt to link learning from an MBA course to leadership coaching. More detail regarding the theoretical and evidence-base for material used to create course content in this unit-in-progress can be accessed through the references provided. However, the authors cordially invite readers to make requests for further information about the course, and also to communicate comments and suggestions on either the current programme or possible future directions using the contact details provided. All feedback correspondence will be gratefully appreciated.

Table 2: Pre- and post-unit reported use of coaching skills and techniques.

Self-Assessment 1 = Strongly disagree; 7 = Strongly agree				
Items (N=36)	2007		2008	
	Pre- (N=36)	Post- (N=39)	Pre- (N=40)	Post- (N=40)
1. I regularly use coaching to develop my skills as a manager.	3.0	4.7	2.9	5.0
2. I effectively use active listening skills in my workplace.	4.7	6.0	5.0	5.8
3. I consistently seek out feedback <i>from</i> others in my workplace.	4.3	5.4	4.4	5.4
4. I regularly use the GROW model in my workplace.	2.0	5.0	1.9	5.1
5. I consider mental models and how they impact the interpretations of people around me.	3.0	4.8	3.2	5.0
6. I willingly take on risk in my work setting.	4.5	6.0	4.8	5.7
7. I try to assist my co-workers in their goal setting.	5.0	6.0	5.2	5.9
8. I strive to create quality conversations with my co-workers (and move a discussion from being problem focused to being solution focused).	5.4	6.0	5.5	6.1
9. I embrace change in my workplace.	6.0	6.4	5.7	6.2
10. I <i>provide</i> co-workers with feedback that is both supportive and challenging.	5.0	6.0	5.1	5.8
11. I am a better leader in my workplace because of my use of coaching skills.	3.4	6.0	3.7	6.1
12. I use coaching in my own stress management.	2.5	5.8	2.9	5.5
13. I have wide ranging experiences as a coach in my workplace.	3.0	4.6	2.9	4.3
If you agreed to statement 13 (rated it either 5, 6 or 7) and use coaching in your workplace, please consider the following questions:				
	Pre- (N=17)	Post- (N=20)	Pre- (N=14)	Post- (N=24)
14. I regularly set up formal coaching sessions with co-workers.	3.4	4.4	3.6	4.2
15. I use a coaching approach when working with teams in my workplace.	4.2	6.0	4.4	5.8
16. I am confident in my coaching abilities when supporting my co-workers.	4.0	5.4	4.6	5.7
17. I try to keep my coaching as positive as possible.	5.0	6.0	5.4	6.2
18. I regularly seek out co-workers who can provide coaching assistance to me.	4.0	4.6	3.9	4.7
19. I notice that the people I coach in my workplace have reached the goals identified from our coaching sessions.	5.0	5.6	5.3	6.0

Table 3: Post-unit self-assessment of changes in coaching effectiveness.

Leadership Coaching		
In the past two months to what degree do you believe you have increased or decreased your effectiveness in dealing with the following areas: 1 = Much less effective; 10 = Much more effective.		
	2007	2008
1. Using coaching techniques to develop my skills as a manager - being aware of coaching skills and their ability to influence good management practice.	8.43	8.52
2. Active listening skills – attending to the comments and discussions of others and actively displaying strong listening skills.	8.23	8.20
3. Receiving feedback <i>from</i> others – ability to listen without judgment on the thoughts/beliefs/ideas of others about me.	8.12	8.15
4. Using the GROW model – considering appropriate opportunities to use questions from the various GROW components to support a conversation.	7.65	7.49
5. Mental models – considering how the mental models developed by others may impact their interpretation.	7.75	7.90
6. Willingly taking on risk – ability to actively embrace risk within your work responsibilities.	8.54	8.65
7. Goal setting – interest to support and encourage the goal setting of others.	9.00	9.12
8. Quality conversations – ability to move a discussion from being problem focused to being solution focused.	9.10	9.15
9. Support for change – interest to actively engage in change.	8.08	8.86
10. Providing feedback <i>to</i> others – offering feedback to other people in a way that is both supportive and challenging.	7.81	8.80
11. Enhanced leadership – using coaching skills to fine-tune/improve/develop my leadership skills.	8.00	8.45
12. Using coaching as a stress management technique – I consider and use the skills of coaching to manage my own stress or the stress of others.	7.32	7.75
13. Using coaching skills in the workplace – I am committed to using coaching skills within my work environment.	9.34	9.34
The following statements relate to various abilities within the work environment. Please reflect on these skills and indicate to what degree you have increased or decreased your effectiveness in dealing with the following areas based on your coaching experiences during the past two months.		
14. Motivation and commitment – hard-work ethic, internal motivation, commitment, drive and determination.	7.32	7.34
15. Self-belief and Optimism – unshakeable self-belief and ability to remain positive and optimistic even when faced with difficulties or failure.	7.84	8.04
16. Positive Perfectionism – set high standards, experience few doubts about abilities, pursue perfection but settle for excellence.	8.02	8.00
17. Resilience – ability to bounce back from set-backs and perseverance (never quit in adversity).	8.46	8.24

Table 4: Summary of written feedback from students.

Theme	Sub-theme	Representative quotation
Communication	Ability to ask questions	I have observed differences in how I ask questions and how I am actively working on accepting feedback from others. I am doing this by honoring their comments and not disagreeing and simply saying thank you.
	Quality conversations	I am more open to the nature evolution of dialogue and find my conversations/meetings are more meaningful due to my dropping misconceptions and listening to the 'reality' before making assumptions.
	Seeking feedback	This unit has reinforced the critical components of effective communication, especially seeking feedback and has made me realize that authenticity and sincerity are key factors of meaningful communication.
Interpersonal skills	Active listening	I'm more responsive to others and more readily recognize that the initial response or answer to a question is not the real issue and am more prepared to spend time actively listening and discussing the real issues.
	Empathy	Recently with others at work I was able to trust and create empathy. That's a big step forward for me.
	Self-Awareness	I have been more self-aware and reflective. The unit has made me aware that, under stress, I become a bit perfectionistic. I now know that self-awareness is the first step to improving my reactions in such circumstances as well as the reactions of my staff.
Overall impact	Positive outlook	I have found an internal coaching dialogue now challenges the 'negative voice'. I've become a problem solver and a solution seeker and in general believe I've become a much more positive person.
	Patience	Having taken this unit I have become much more patient with my work colleagues.
	Solution-focused	I am much more solution-focused and optimistic in my role as leader of a team making huge amounts of change and I am convinced we (class members) now have all the resources we need to deliver magnificent results.
Overall impact	Mindful	I am more aware of the need to be present when talking/listening to my colleagues. Also I have been able to 'grasp' the moment and be totally involved and focused on the coaching session. I'm more positive and more observant or mindful of others.
	New language	I've learned a new language and now engage in more positive conversations with my family, friends and work colleagues. I have also learned things about my own values and goals that are potentially life changing.

Table 4: Summary of written feedback from students (continued).

Theme	Sub-theme	Representative quotation
	Coaching as a personal style	My engagements with staff are now more coaching focused. The unit has really clarified for me that this is what I want to do and be. Coaching has also worked really well on my daughter and added a new dimension to our relationship.
	Coaching culture at work	It has deeply galvanized my desire to work as a coach in organisations as well as exploring how I can contribute and reinforce its credibility and move coaching toward a highly respected and sought after profession. I fully intend to integrate a coaching culture into my team at work as I have seen the positive outcomes it can deliver.
	Personal and professional approach	I am now much more conscious of coaching opportunities in the workplace and in private life. For example, I am consciously engaging in solution focused rather than problem solving approaches to my work team and in life matters in general.
	Focus on strengths	Strengths, values and positive inquiry and appreciation are ways of living. I am truly 'appreciative' of being introduced to applied positive psychology principles.
	Invaluable tools and techniques	I now have a sharpened questioning technique and I'm doing more 'deep listening'. Group processes for success and using the Grow Model to structure conversations are also key learnings for me.

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Is coaching an evolved form of leadership? Building a transdisciplinary framework for exploring the coaching alliance

Travis J. Kemp

IT HAS BEEN ARGUED previously that facilitating effective coaching outcomes for clients may in part be impacted by coaches ability to they themselves engage in the process of reflecting upon 'self'. This introspective process involves identifying, surfacing and managing one's own unique behaviours, cognitions, perceptions, emotions and schemata within the coaching relationship (Kemp, 2008). Furthermore, it is hypothesised that effective coach's actively utilise this awareness to manage both the positive and negative impacts of these traits on their clients' developmental processes (Kemp, 2008). Similarly, the current paper proposes that effective and impactful leaders also engage in an ostensibly similar process as their coaches, often within the context of leadership coaching. Indeed prominent leadership theorists such as Boyatzis and McKee (2005) have proposed that coaches working within the context of leadership, like the leaders they are coaching, must build resonant relationships with those with whom they lead. Most importantly, this requires the ability of the leader and coach to develop the core competencies of compassion, mindfulness and hope within oneself prior to attempting to support others in their growth and performance efforts. If this is the case, the conceptual and functional structures observed within effective coaching relationships and effective leadership relationships may well be very similar. Hence, in an effort to stimulate future thinking and research into the coaching and leading alliance, this paper outlines a theoretical proposition that highlights the similarities in

development process, structure and function of the coaching and leadership alliance. The paper proposes a schematic framework for the building of effective coaching and leadership alliances and concludes by encouraging both researchers and practitioners to reflect upon the coaching and leadership alliance from the phenomenological context of *relationship* in support of our efforts to broaden and deepen our understanding of both practices beyond the current limitations of models and competencies.

The Coaching-Leadership Interface

Coaching relationships have been conceptualized previously as unique forms of helping relationship and hence, share many of the common structural and interpersonal characteristics as the related helping professions of psychotherapy and counseling (Kemp, 2008) with this perspective continuing to gain strong practice based support (Coutu & Kauffman, 2009). Indeed, some authors (Horvath 2000, 2001, 2006; Horvath & Symonds, 1991) have both argued for and demonstrated the central function of the therapeutic alliance in achieving effective client growth outcomes. Likewise, leadership can be seen as a series of structured relationships through which a leader facilitates and guides performance the growth, development and performance of her followers. These conceptual similarities provide a compelling opportunity to explore the application of the bodies of knowledge from the related helping professions to the development of a deeper understanding of the leadership and coaching alliances.

The importance of leaders actively engaging in a process of continuous introspective reflection and self-management may appear obvious to some however following Greenleaf's (1970) early ground-breaking work on Servant Leadership, focus shifted away from the internal world of the leader being central to leadership effectiveness and towards competency and trait based approaches such as Situational Leadership (Hersey & Blanchard, 1977) and contingency models of leadership such as those presented by Fiedler (1967) and House (1971). Greenleaf's radical proposition suggested that the essence of leadership was the desire to serve another and to serve something greater than ourselves. This, Greenleaf suggested, required the leader to develop and nurture such traits and virtues as acceptance, empathy, growth, healing, serving, persuasion, awareness, perception, stewardship, calling, listening and understanding. Indeed Greenleaf himself was amongst the first leadership theorists to propose that relationships were the fundamental key to leadership effectiveness.

However, it was not until relatively recently with the publication of Jaworski's (1996) paradigm shifting work *Synchronicity* and the latter emergence of emotionally intelligent leadership (Goleman, McKee & Boyatzis, 2002), that the notion of introspection and self-management being central to leadership effectiveness transitioned from being 'new-age' and fringe-dwelling hype to self-evident truth. Likewise, it was about this time that early authors in the field of executive coaching such as Burdett (1998) tentatively proposed that coaching could be seen in and of itself as a more highly evolved form of leadership. Since that time, this perspective has continued to gain momentum amongst leadership and within the leadership and coaching literature alike (Boyatzis & McKee, 2005; McKee, Boyatzis & Johnston, 2008).

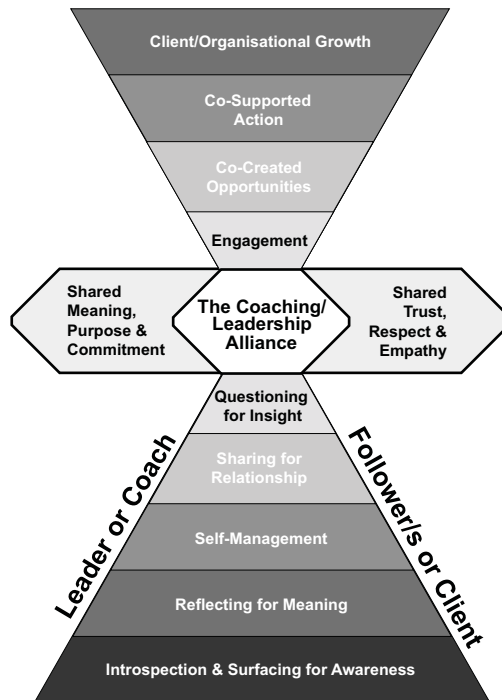
Whilst there is growing support for this relatively new form of leadership and coaching development approach, there is a dearth of discussion within the peer-

reviewed literature on the topic of the coaching or leadership alliance. In addition, little time has been devoted to capturing and exploring the phenomenon of the relationship in regards its structure, function and processes inherent in its development. In response to this situation, the coaching alliance framework was constructed. Whilst originally conceptualized to provide insights and structure to building the coaching alliance, the framework also demonstrates solid and direct applied utility for use in developing leadership alliances between leaders and their teams and organisations.

The Coaching and Leadership Alliance Framework

The human change process is complex (Gilbert, 2002) and both leaders and coaches face a perplexing conundrum. How can leaders and coaches be expected to lead and facilitate change and performance without having first developed their own intimate and personal understanding of their both themselves and their responses to change? In addition to there being little guidance for coaches and leaders in their own continuing journey of growth and development, frameworks and tools to support this process are difficult to find. It is for this reason that the Coaching and Leadership Alliance Framework was developed to provide a framework for coaches and leaders to contextualize the self-management process and clarify its role in supporting clients and team members maximize the impact of their coaching and leadership effectiveness. The framework explains the progressive antecedents and building process common to the majority of effective and professionally impactful coaching or leadership relationships. The framework also positions the process of self-management itself at the centre of all successful leadership and coaching alliances. This framework highlights the importance of the coach or leader's own self-focused development in ensuring the effectiveness of the coaching and leadership relationship.

The Coaching and Leadership Alliance Framework



Introspection and surfacing for awareness

The foundation of the alliance framework lies in the active process of introspection. This process represents the progressive surfacing of the coach and leader's pre-existing beliefs, values, biases and prejudices. The core challenge of the coaching and leadership relationship lies in the inherent subjectivity and bias that exists within the coach and leader herself. A leader or coach's unique experiential and psychological constitution inherently influences her perceptions of her followers or clients so whilst the surfacing of these internal structures is critical within this phase of self exploration, it is the validation and confirmation of one's self-concept that provides the foundation for understanding and subsequent ability to manage her external impact on those around her. This validation and confirmation process is often achieved through formal and informal external feedback and in the case of coaching psychologists, professional supervision.

It is this initial introspection, surfacing and awareness raising phase that enables the coach or leader to firstly identify, then develop, a deeper understanding and awareness of her unique strengths and weaknesses as a professional helper.

Reflecting for meaning

Once surfaced, the coach or leader's growing awareness of her 'self' becomes a foundation for continuing reflection and processing. As the coach or leader raises his awareness of his thinking, behaviour, feeling or perception, these insights provide the content for deeper reflection and progressively more complex and intimate understanding of self. It is here that the leadership coach facilitates significant gains in the leader's ability to see and understand their own unique self-concept. In the case of the coach, this is again achieved through the supervision process. During this phase, the coach or leader actively explores and frames her biases, complexes and the underlying

schemas driving her current repertoire of behaviour.

Self-management

Once deeper meaning has been established on the foundation of new awareness, a 'Self-Management Plan' (SMP) can be constructed. Whilst this may often be informally within long term memory, for others it can be documented and referred to on an on going basis. By mapping her potential biases, blind spots and conditioned beliefs as they manifest in the relationship at hand, the coach or leader actively creates mechanisms and strategies for limiting their negative effect and maximizing their positive effect in her coaching or leadership relationships. Broadly, this may include identifying triggers or cues for problematic behaviour, scripting thought disrupting dialogue or practicing positive affirming self statements during times of doubt or anxiety when coaching or leading.

Sharing for relationship

Once the self-management plan is in place, the coach or leader begins to develop a deeper capability to listen to the intent behind the client or team member's language and literal dialogue to the core of what is being communicated. They are able to in effect, create the time, space and intent to listen a far deeper level than what is normally afforded general conversation. This process of 'listening with the third ear' (Macran, Stiles & Smith, 1999, p.426.) allows the coach or leader to begin to develop a more complete picture of the client or team members unique commitments and passion . As the coach or leader's perceptual filters and processing biases are more mindfully managed within the conversation a greater appreciation for the richness of the client or team member's experience can be harnessed within the alliance relationship. In short, the coach or leader is able to listen, hear and respond to the client or team member in a way that minimises his subjective influences of the his own life experiences, personal

values, opinions and judgements and hence, develop a greater depth of understanding of his client or team member. When both leader and lead, coach and coachee progressively share this reflective and deep listening space, the opportunities for deeper sharing and meaning making increase proportionate to the increases in trust, respect and empathy in the alliance.

Questioning for insight

The importance of questioning as a contributor to raising introspective self-awareness has been emphasised previously (Clarkson, 2000). Indeed, authors such as Overholser (1996) have argued for adopting a position of 'ignorance' by utilizing a broadly Socratic method of personal enquiry. Translated, this ignorance can be conceptualised as the adoption of the mindset of an inquisitive and curious learner, underpinned by genuine interest, concern and unconditional positive regard. By adopting this position in one's questioning approach, the coach or leader creates a conversational within the alliance that allows for the client's or team member's needs and reflections to surface, be voiced, heard and deeply understood. As the alliance deepens, the coach or leader is able to contribute progressively more refined and insight-surfacing questions. Insight-surfacing questions are those that stimulate a cumulative and generative effect and motivation within the questioned and subsequently illicit deeper personal awareness and reflection.

The shared experience of relationship – The birth of the Alliance

The cumulative impact of engaging in these progressive phases within the framework is the establishment of a relationship between coach and client, leader and team member, that has at its foundation a deep sense of shared meaning and contextual clarity. Once established, this becomes the catalyst for achieving transformational results through the alliance. By embracing and demonstrating the three 'pillars' of Carl Roger's person-centered therapy – empathy, congru-

ence and unconditional positive regard (Barrett-Lennard, 1998) the alliance surfaces a deep sense of shared trust commitment and purpose.

Alliance outputs

As a result of engaging fully, consistently and persistently in the initial five phases of the alliance building process, the coach or leader can now freely facilitate client or team member driven conversations and outcomes in vastly accelerated timeframes. As trust, respect and empathy build and shared meaning emerges, shared purpose and commitment subsequently surface, allowing for high levels of mutual engagement to drive new opportunities and new and creative ways to realize these opportunities. With trust and respect comes support for endeavor and a progressive dissipation of fear, resistance and ambiguity. This broadening movement toward client and or organisational growth allows for a rapid expansion of possibilities and opportunities to surface for the client and team member. Probabilities of new levels of performance become apparent and are seen as achievable, further fueling the client's or team member's motivation for continuing focus and effort. Likewise, the leader and coach herself experience these outcomes in parallel with her team and clients. The alliance in effect, becomes the source of motivation and energy for continuing growth of not only those within that alliance, but of those positively impacted by the outputs within the client's broader circle of relationships or in the case of the leader, the culture of the wider organisation. By engaging courageous and persistently in the foundational phases of the alliance building process, the possibility of accelerated and transformational leadership and coaching outcomes are increased and the likelihood of growth and performance success greatly increased.

Conclusion

This discourse has been designed to provide an impetus for the next wave of exploration within the coaching psychology literature. The current special issue of the *International Coaching Psychology Review* has brought together many of the world's leading thinkers in the field of leadership and coaching and has provided us with a benchmark of current thinking and progress towards deepening our understanding of the phenomenon of leadership coaching. We have come a long way in developing models, practices, programmes and methods within the context of leadership coaching and indeed, coaching in general, and the next wave of exploration is sure to surface new and exciting insights into leadership more broadly. Coaching and leadership alliances provide an exciting opportunity for that exploration which actively bridges the gap between coaching psychology and leadership development. The apparent centrality of the coaching and leadership alliance to achieving successful client and organisational performance outcomes beckons us to explore this phenomenon with energy, focus and rigor in the future.

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Book Review

The Leader's Way

His Holiness the Dalai Lama &
Laurens Van Den Muyzenberg

London: Nicholas Brealey Publishing, 2008.

202 pp; AUD 32.95.

Reviewed by *Travis J. Kemp*

There has been a growing interest in the application of applied positive psychology methods to the context of coaching in recent times. Indeed, a special issue of the *International Coaching Psychology Review* (Linley & Kauffman, 2007) was devoted entirely to this theme. Since that time, momentum has gathered in the application of positive psychology to coaching, for example, the mindfulness-based meditation practices outlined by Kabat-Zinn (2005) have been of particular interest to many practicing coaching psychologists. Publications in this area have ranged from the more theoretical applications of mindfulness-based training to coaching (Collard & Walsh, 2008) to more robust randomised treatment-control group designs such as those reported by Spence, Cavanagh and Grant (2008).

These methods have been employed in Eastern philosophical traditions for thousands of years and recently, through the convening of special interest groups within professional psychology associations such as the Australian Psychological Society, broader Buddhist practices are being explored as potential positive applied psychological interventions within mainstream practice.

Hence a collaboration between the Buddhist tradition's highest office holder, His Holiness The Dalai Lama and international management development consultant Laurens Van Den Muyzenberg may be of interest to the coaching psychology practitioner working within the leadership coaching context.

The Leader's Way opens with The Dalai Lama and Muyzenberg illuminating their

respective interests in the other's domain of expertise. Of course, Buddhism is no stranger to business and leadership, with previous insights into this marriage of philosophies being eloquently captured by Buddhist authors such as Roach (2000). However, The Dalai Lama's explicit intention of contributing to this book is made clear in his introductory declaration:

'Why am I writing this book now? Because I feel we all should have a sincere concern and take responsibility for how the global economy operates, and an interest in the role of business in shaping our interconnectedness.' (p.1)

Prophetic and enlightening words from a simple monk as we now settle in to the worst period of economic turmoil in world history.

The book is organised into three broad sections. Leading Yourself; Leading your Organization; and Leading in an Interconnected World. Each of these sections has three unique chapters outlining the application of a specific Buddhist principle to leadership and organisations.

The dialogue within the chapters captures the flowing discourse between The Dalai Lama and Muyzenberg as the application of the broader Buddhist principles of living to the challenges of leadership are progressively explored.

Part one, Leading Yourself, explores the process of developing wisdom and introduces the reader to the Buddhist philosophies of dependent origination, interdependence and impermanence. Muyzenberg articulately translates the application of these principles to the leader's unique context and challenges and simplifies these often complex and multi-layered concepts into tangible and useable insights and practices for leaders. Staying positive, accepting reality and taking ethical actions are each explored in the first three chapters but perhaps the most immediately accessible and intriguing element of this opening part is the explorations of the Six Perfections; Generosity, ethical discipline,

patience, enthusiastic effort, concentration and wisdom. These six perfections, albeit in creative Western business vernacular, have become a central concern and focus for contemporary leadership theorists. The final chapter in this part outlines the importance of training one's mind in achieving effective leadership. As one would expect, meditation features heavily here and the reader is introduced at a very basic level to the basic structure, function and outcomes of meditation practice.

Part two, *Leading Your Organization*, turns its attentions to discovering and articulating purpose. The importance of values are highlighted and the tricky subject of the leader's character is explored in the context of understanding principles and the Buddhist notions of causation. Again, the importance of understanding oneself lies at the core of understanding 'other' and this theme is consistently reinforced throughout the book. The place of consistent and constant mindfulness and self-management emerge as consistent themes for leading effectively. The concluding chapter in this part focuses on integrity in business and ethical conduct and the importance of transparency and integrity in transacting business is highlighted from the core Buddhist principles from whence they emanate.

Part three extends the conversation to the challenges of globalization and the loss of diversity within a global market. The implications of environmental change are also touched upon but it is at this point that the book begins to deviate subtly from its balanced and pragmatic approach to relating Buddhist learning to leadership and strays towards becoming a platform for articulating a considered yet values influenced view. I stress at this point that this shift is subtle, however, as the emerging challenges of globalisation are explored, there surfaces a hint of the political and the human-rights activist in both authors perspectives. Strong socialist philosophies relating to enterprise, property ownership and the banking system are postured and a diagnostic approach to a

dysfunctional world economy begins to surface. Whilst theoretically sound, the latter chapters grapple with maintaining the balance between pragmatism and idealism which the reader must ultimately resolve on their own terms.

In summary, this is an accessible and easily digestible book for all those interested in leadership and leadership development regardless of their level of familiarity with Buddhist philosophy. For those coaching psychologists working with positive applied methods, it provides a basic foundation in one Eastern philosophical source and its theoretical application to Western business challenges. As a result, it can provide a valuable entry point for clients who are open and interested in exploring an alternative paradigm for leadership development. Whilst the book could be seen by its harsher critics as straying into a values laden duologue, the discerning and well self-managed reader will attend to the timeless core messages it articulates and derive a degree of insight and perspective on the complexity and challenges inherent in the role of leader.

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Special Group in Coaching Psychology News

Vicky Ellam-Dyson

HELLO and a warm welcome from the SGCP Committee and those involved with the work of the SGCP.

We have another busy and exciting year ahead and are well under way with working towards our aims for this year. We are committed to bringing our members even further benefits this year, in spite of the challenges of the current climate. Those involved in the work of the SGCP all give their time voluntarily, but continue to pull together during these difficult times to ensure that we can deliver what we commit to. Many many thanks to all those involved.

Connecting our members

One of our main aims this year is to develop channels for bringing together our members to create a strong community and network to enable debate and discussion of issues and ideas, swap information, practice skills, etc.

This will include an online forum for interactive discussion, which can be accessed via our website and will be launched imminently. The website in general is being given a new look and feel this year to provide a more attractive and user friendly source of information for existing and new visitors to the site.

We will also be supporting and developing guidelines for our members to create their own practice groups, where individuals can come together and discuss ideas and issues, practice coaching, learn from each other, etc. We have a working party that are currently scoping out the requirements and we expect this initiative to be launched by mid-2009.

We have other ideas in the pipeline that we are exploring too. We are pleased to have had some great input into ideas for events and networking from our Australian

colleagues in the Interest Group in Coaching Psychology (IGCP).



Events

Our events team have put together another really interesting and engaging schedule of events for this year, including workshops with topics focusing on 'Psychology of Wisdom' with Julie Allan, 'Working with Uncertainty' with Ernesto Spinelli, and 'Goal Setting' with Bruce Grimley. The team will also be scheduling a number of tele-events this year. Details of all the events can be found on our website.

Conference

The conference team are in the throes of organising our annual conference for December 2009. This will be our 2nd European conference and will focus on Changing Perspectives, with particular themes including: Hope and Wisdom, Engagement, Transition, Performance, Health and Well-being, and Developing Practice. A call for papers has been issued, with a deadline of 15th June. Full details are available on the website.

Accreditation

It is now clear that we are not going to be able to offer an option for accrediting psychologists who work in this area within the existing structure of the SGCP. As the British Psychological Society moves towards accrediting qualifications, and HPC moves towards taking responsibility for certifying whether individuals are fit to practice, a two pronged development is going to be required to provide Coaching Psychologists

with the full range of options that are open to other areas of applied psychological practice. In the meantime, we are looking at working with other accreditation providers for this area of psychological practice. For an update please see the SGCP website.

Relationships with other coaching psychology bodies

During the last year we had a great opportunity to develop some close links to the IGCP, with visits to the UK by Peter Zarris (National Convenor) and David Heap (New South Wales State Co-ordinator). It has been really encouraging to realise that not only can we learn from each other's experiences, but also that both sides are extremely open and willing to do so. For example, the SGCP has had much experience with scoping out options for accreditation, which could be of great use to the IGCP in helping them make steps forward without having to reinvent the proverbial wheel. Whilst the IGCP have offered some inspiring and exciting ideas for how the SGCP can bring together members, particularly around networking. As Peter mentions in his news piece, there are also opportunities to input to each other's events and conferences where we find ourselves on each other's 'turf'.

The SGCP has also developed close links with other coaching psychology professional bodies around Europe, including Ireland and Denmark. These links have proved really useful, again for the sharing of information and for strengthening the awareness of possibilities locally. We are happy to acknowledge that discussions are happening in other parts of Europe regarding the possibilities of developing local coaching psychology bodies.

Finally, on behalf of the SGCP I'd like to express many thanks to Kasia Szymanska, who we're sorry to say is stepping down from her role as Editor of *The Coaching Psychologist*. Kasia was involved in establishing and launching *TCP* and has done a fantastic job in its continued development. Kasia will, however, be staying with us as Book Reviews Editor, and we are happy to announce that Siobhain O'Riordan will be working with us as Acting Editor for *TCP*.

As always, we welcome input from our members and readers of our publications. Please do get in touch.

Best wishes.

Vicky Ellam-Dyson

Chair, SGCP

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www.sgcp.org.uk

Interest Group in Coaching Psychology News

Peter Zarris

WE ARE PROUD to continue our alliance with SGCP – our partners in the UK. This new bulletin offers a great opportunity for the National Committee to increase our communication with you, our members.

This new section to the *ICPR* allows us to share the key issues and ‘news items’ for the IGCP. We think this a wonderful initiative and sincerely thank Prof. Stephen Palmer for this opportunity.

The Symposium – past and future

As we have already communicated to you – the 3rd ICGP Symposium last year (2008) was a resounding success with nearly 200 delegates attending and a great response from all those who attended.

Next year’s conference will be in Melbourne and the head of the Melbourne Symposium is Nic Eddy – the Victorian State Co-ordinator. We are hoping to develop some innovative and creative approaches to the next Symposium.

As some of you may know the 27th International Congress of Applied Psychology will be held in Melbourne on 11–16 July, 2010. It’s expected that this event will attract many hundreds of overseas delegates, some of which will be travelling a long way.

We will be exploring the possibilities of linking our Symposium with this event. We will be calling for expressions of interest for presentations later this year. We are very keen to have a strong representation from the SGCP and other coaching groups as both presenters and delegates so start thinking now about coming down to Melbourne in 2010!

New Member Group and Changes

Canberra

Vicky de Praser has volunteered to convene an ACT chapter of the IGCP. This has been ratified by the National

Committee. Vicky will be strongly supported by the New South Wales state committee and we hope they will continue to work in close alliance as we build our member base moving forward.

Nanette McComish has had to stand down as the state convenor for South Australia for personal reasons. Nannette has been one of the absolute rocks of this group – she has worked tirelessly and has so much fundamental knowledge about the group that we hope her absence is short lived. At a personal level she has been invaluable and I can’t thank her enough for her help and support.

We have a new National Treasurer – Mr. Henry McNicol who took over the role from Ken Richards. Henry now joins the National Committee and is another person who has extended his great contribution on a state committee to the national level.

Professional Development Events

I am staggered by the amount of volunteer work being done by the State Co-ordinators, symposium subcommittees, and National Executive team members. The amount of work and commitment these people put forward can only be described as inspiring.

We will continue our work in bringing you opportunities for development and the acquisition of Professional Development points but we need your support via attendance.



We also want your input and feedback on what you are seeking from IGCP and will be providing the opportunity for this via an online survey we will soon be sending out to a sample of our members. We are looking at some innovative approaches. Options including Webinars and other strategies to complement our existing events are currently being examined. The *ICPR* will continue to be made available to our members electronically. Again we encourage you all to take advantage of our website.

The December 2008 London Visit – David Heap’s report:

As part of our on-going commitment to developing our most important coaching psychology alliance – we had the opportunity to send a representative to the SGCP National Conference.

David Heap, our NSW State Co-ordinator and our last Symposium Chair was chosen to represent our group. This built on the development of the alliance with the SGCP via meeting I had with them in London last year and the visit by the then SGCP National Chair Dr Alison Whybrow, who was also a wonderful keynote speaker at our last IGCP symposium. David’s report to the national committee follows below.

Accreditation

This is an area we are going to be actively engaged in developing this year. We plan to liaise with the SGCP’s Accreditation Working Party to see how we might build on each other’s work.

Conferences

I was very impressed with a number of the speakers (Prof. Stephen Palmer, Prof. Alex Linley, Dr Ho Law, Prof Siegfried Greif and Dr Michel Moral amongst others) at the 1st European Coaching Psychology Conference who would enhance our 2010 event. We should explore ways to increase the interchange of speakers and participants at each other’s conferences. Most people I spoke to were very keen to come to Australia, given

our strong reputation in the coaching world. Cost and distance are potential barriers, especially if we are all to become destitute as it would seem at the moment.

Publications and Research

Our joint management of the *ICPR* is currently covered under a Memorandum of Understanding, with Dr Michael Cavanagh and Prof. Stephen Palmer at the helm as joint Co-ordinating Editors. We will continue discussions this year about extending the distribution of the journal, including the possibility of providing printed copies to our IGCP members, subject to demand and costs.

CPD Events

A number of the speakers such as Dr Ho Law and Prof. Stephen Palmer will be travelling this way in 2009 and we made some informal arrangements to organise opportunities for them to speak or run workshops whilst in the country. It may worthwhile for us to set up some system so that visiting (in either direction) coaching psychologists who are interested in presenting a CPD event whilst in the host country could organise this through the IGCP/SGCP. We run many of our events in NSW this way but at a more opportunistic level. I don’t think this list exhausts the opportunities and I’d welcome suggestions for other areas of collaboration.

Other resources and institutions

There seems to be a lot more infrastructure for coaching and coaching psychology training and accreditation in the UK. This suggests a gap in the Australian market that may be an opportunity for the IGCP to fill. Some UK examples are below:

Coaching at Work: a coaching magazine published by Chartered Institute of Personnel and Development (AHRI/AITD). An easy read, rather than an academic journal.

Association for Coaching: An association for those who coach. Founded in 2002 in the UK with a full range of services. Seems to be a good alternative to the ICF.

Impressive Honorary Officers include Cary Cooper, Marshall Goldsmith, Tony Grant and Stephen Palmer.

Routledge publishers had a big presence at the SGCP's 1st European Coaching Psychology Conference. Wide range of relevant publications with two stand outs. You may already be aware of this but the *Handbook of Coaching Psychology* by Stephen Palmer and Alison Whybrow is a great 'everything you ever wanted to know but ...' type reference. I bought one and I'd consider it an essential purchase. They also publish the Association for Coaching's journal – *Coaching: An International Journal of Theory, Research and Practice*. Also looks good. The site is: www.tandf.co.uk/journals/titles/17521882.asp.

We will be posting more information regarding David's trip on our website over the coming months.

Our website

We will keep you posted on our website. To access this go to:
www.groups.psychology.org.au/igcp/about_us/

Final word

As you can see there is much happening. Coaching Psychology is here to stay and it is one of the most rewarding interesting and untapped areas of Psychology. We encourage you to stay involved and come along to our local events and thereby support your local committees.

Peter Zarris

National Convenor, IGCP.

E-mail: Peterz@opic.com.au



The
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Psychological
Society

THE SPECIAL GROUP IN COACHING PSYCHOLOGY

**2nd European Coaching Psychology Conference
15th and 16th December 2009**

Changing Perspectives

In a climate of change and uncertainty, one thing that can be assured is that we consistently offer an excellent, engaging and professional event that brings together a diverse community of coaching psychologists and coaches to network, develop their practice and deepen their knowledge base.

We are inviting you to consider presenting your work at the
2nd European Coaching Psychology Conference.

We know you will enjoy taking part

Participants in previous years' events describe their experience as one of warmth, openness and energy. We have masterclasses, keynote papers, research and case study presentations, skills-based sessions and discussion sessions.

Call for Papers:

Deadline 15th June 2009

This year, the themes of the conference are:

Hope and Wisdom

Engagement

Transition

Performance

Health and Wellbeing

Developing practice

We are calling for symposia on these topics.

We encourage you to use the SGCP resources to network with colleagues to create symposia. Individual papers are welcomed as poster submissions.

For further information and submission details see the SGCP website:
http://www.sqcp.org.uk/conference/conference_home.cfm or email sqcpcom@bps.org.uk

The 2009 membership fee to join SGCP is £8.50. SGCP membership benefits include membership rates at our events and free copies of the 'International Coaching Psychology Review' and 'The Coaching Psychologist'.

Join now and obtain the discounted conference fee.



THE SPECIAL GROUP IN COACHING PSYCHOLOGY

New Editor required for *The Coaching Psychologist*

The new editor will be responsible for the content and design of *The Coaching Psychologist*, published by the British Psychological Society Special Group in Coaching Psychology, commissioning articles and for ensuring it meets the current publication deadlines of twice a year. The editor will liaise with a team of consulting editors, European editorial advisory board, the British Psychological Society's office, and have ex-officio membership of the committee of the Special Group in Coaching Psychology and the Publications and Communications Sub-Committee.

The Editor's role is initially a two-year post (commencing in August, 2009, and reviewed after 12 months) subject to review with the SGCP Publications and Communications Sub-Committee.

Applications are invited from Chartered Psychologists with appropriate experience and who are members of the SGCP.

If you are interested in applying for the post, please e-mail a copy of your CV and accompanying letter to:

Elouise Leonard Cross, SGCP Honorary Secretary at
elouiseleonard@yahoo.co.uk

Applications to be received by 31st May 2009.

For an informal discussion about the post please e-mail the former editor at kasia.s@tinyonline.co.uk



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