



The International Journal of Coaching in Organizations

IJCO

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Joan O. Wright, MCC, panel moderator

Also contributing panelists:

William Bergquist, PhD, Bob Johnson, Linda Miller, MCC,
Mary Beth O'Neill, MA, Dr. Jeannine Sandstrom, MCC,
Val Williams, MCC and Klaus Zepuntke

This article first appeared in the *International Journal of Coaching in Organizations*, 2005, 3(4), 14-24. It can only be reprinted and distributed with prior written permission from Professional Coaching Publications, Inc. (PCPI). Email John Lazar at john@ijco.info for such permission.

Journal information:

www.ijco.info

Purchases:

www.pcpionline.com

2005

ISSN 1553-3735

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Professional Coaching Publications, Inc.



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This article presents commentary delivered during a panel discussion conducted as a part of the ICF 9th Annual Conference in Quebec City on November 5, 2005. The discussion consisted of three levels or topical areas and was entitled "Taking it Deeper: The Art and Science of Credible Executive Coaching." We believe the program was particularly well received because it included agenda topics that are not often discussed in public forums. Panelists were willing to take a bit of a chance and publicly share perceptions and feelings on topics like client relationships, colleague perceptions and personal career aspirations that are normally discussed behind closed doors. This candid communication set the stage for a dynamic communications exchange and heightened attendee interaction. The moderator and panelists placed nearly 150 years of combined executive coaching experience on the line and willingly presented their stories knowing all the while that their position would be challenged by fellow panelists using a point vs. counterpoint technique to express their differing viewpoints. We hope you find this article thought provoking and that it causes you to stop and compare notes on how you feel about each subject being addressed. Equally important, we urge you to volunteer as a future panelist at the 2006 annual conference. To a person, we can assure you that your commitment will be repaid twofold in career gains.

Panel Particulars

This is the second year the article contributors agreed to participate in a panel discussion at the ICF Annual Conference. Our initial effort being well-received, we mutually agreed to assume responsibility for a second panel since we wanted to accomplish two objectives: 1) to prepare a second panel discussion of even greater value for attendees and ourselves, and 2) to aid in the recruitment of the next panel by issuing a call to action to our peers.

One of the interesting things this dynamic group decided to do was openly converse about coaching topics that are often addressed "behind closed doors." We knew that by candidly sharing our feelings about subjects ranging from client selection and colleague perceptions to views on our career we would get people stirring.

To meet our first objective we agreed that our topical matters should be considered sensitive in nature. We needed to select issues that we might not talk about in public places (even though we want to) because we felt that such topics would stimulate attendee thinking and serve as a platform for some interesting interaction. In short, we had to be able to throw caution to the wind and have the guts to go for it.

Once underway with planning, our leap of faith became exhilarating. Early in the preparation stage we realized

how stimulating this session would be to panelists and attendees alike. We corporately boiled down the nitty-gritty issues and decided that we would use our differences in a positive way to enhance the output of the panel discussion.

We would use a point - counterpoint format and take our various stands in a way that would enable others to see both sides.

Our panel outline had three distinct levels. They were:

- Level One- How we perceive/feel about our clients.
- Level Two- How we perceive/feel about our colleagues (fellow coaches).
- Level Three- How we perceive/feel about ourselves as coaches.

Here now are the panelist's perceptions and feelings from "Taking it Deeper: The Art and Science of Credible Executive Coaching."

Level #1 – On the Topic of Clients

Moderator (Joan): Let's begin our discussion today addressing the subject of client perceptions. Panel, what type of client do you work best with?

Jeannine: I work best with a client who already knows about coaching and may even have had some challenging experiences with coaching. Their screening of us is much more rigorous than it used to be. They now not only ask, "What do you do?" but also, "How

do you do it?" and "What are the results that we can count on?" The questions are tougher and they are asking for specific experiences and references that were never previously checked. There are also conversations among the client companies and among the individuals who have been coached. In fact, I find them asking, "What is your band width? Do you try to do everything?"

We need to be very, very conscious of what our abilities are, what we do and what we can't do. There must be a very clear distinction made as client's call, interview and begin to screen for coaches.

Klaus: The clients I work best with are the clients who initially are very open to the coaching process but then show resistance to coaching once they are underway. I really like this type of client because he or she offers the tension of opposition and this is a kind of situation I can work with.

Val: The clients I work best with are alpha males or females. They are typically senior executives who are very good at getting results but not too focused on what happens to the people around them. Sometimes they leave dead bodies in their wake. I like coaching these people. I like working with them because I call a spade a spade. I will lay it right on the line and I find that people at that level appreciate my kind of straight talk.

I would encourage all coaches to find the client type they like because they are going to do their best work with those kinds of people. I find that when you coach in your favorite way, you're automatically going to be successful.

Bill: The clients I do my best work with are people I find interesting. Not just people I like-- rather people I find to be very interesting. Some of the books I have written are about post-modernism. I write about postmodern complexity, unpredictability and turbulence. As a result, I seem to be attracted to and do my best work with people who are faced with enormous complexity in their work. They face great unpredictability and turbulence. This means I do a fair amount of coaching in healthcare, government and high tech. I'm certain some of the very best work I do is with folks who must deal with complexity, unpredictability and turbulence.

Bob: I like the type of client that Val coaches - alpha leaders. It speaks to collaboration. However, I don't think there's a perfect match, a one-size-fits-all mentality when it comes to the opportunity for collaboration. I really can't effectively serve my client when I am not a good match for his or her particular situation. I'd rather refer that type of client to someone else. For me I'd rather work with senior executives and organizations that

want to transform and shift the culture of their organization.

Linda: Switching gears, the clients that I have *the most trouble with* are clients that are clueless. Here's a story relating to this point. I was working with a client on a succession plan. He was looking out too far and I strongly recommended that he consider pulling in the time table from 18 months to 5 months. He was not getting it and finally I asked, "What do you need...a fist to the gut, a 2 x 4 across the head, or a slap across the face?" And there was silence. We were on the phone at the time and the gentleman came back and said, "Do you really think I can do it?" And I said, "Do you?" And he had a succession plan in place in 5 months.

Mary Beth: There are two kinds of clients that I do not do well with. One is the client who is completely uninterested in how his or her own development is connected to getting results. I don't want to work with this client because I'm passionate about how the two are connected. I'm learning to walk away from this type of client because they just don't engage all of my spirit and as a result, I'm not giving them my best.

The other kind of client I really do not do well with is the perennial "underfunctioner." I like "overfunctioners" - people who are running around and getting in their own way and nagging people and doing all that. I'm good with them, but the ones that don't have fire in the belly, I just don't do that well, I'm just not a good cheerleader in terms of whipping enthusiasm into them. So it's actually better for me to walk away.

Klaus: There are two types of clients that I don't enjoy working with and therefore am not very successful coaching. One is the young top executive between ages 35-40. What I've found is that they mostly live in their heads and think that is where all life takes place. I have a difficulty relating to them because, in my humble opinion, they lack maturity. The other type of client I don't care for is the executive who is simply power and status driven. Their fuel is the fear of losing power. They lack having a vision and I have difficulty with that.

Joan: The next question is how do you know when you've been successful with a client and then how does the client know it's been a successful partnership?

Mary Beth: I do my best work with clients who are interested in ROI. The only way either of us will know about this is by setting expectations up front. There is work I do that I call the key factors. It is an easy way to organize a leader's thinking around the areas that drive bottom line results in any organization.¹

What are specific behavioral observable changes in their own behavior, and specific observable measurable changes in the team's behavior? We set all that up front and they have to interrelate to each other. I spend quite a bit of time with an executive talking about identifying these changes. We work that through so they end up knowing what we are striving for. That's what we will be tracking throughout the contract. At the end of the contract, we actually circle back to those key factors and check and see what the measures are. I then ask them what impact the coaching had. I also have them look at all of the variables that could have an impact. Coaching, after all, is just one of them.

Jeannine: To me, our work has to be sustainable. So often I get things in place where a client is focused on the goals we contracted for and then something interferes. Business concerns, competition, the board, something pulls the attention away from the individual's growth and commitment.

That goes hand in glove with the kind of client I don't do well with. If an individual can not keep their own commitment as well as their word and what they're contracting for then I lose interest. I'm real clear that deliverables have to be mapped, the person committed and consistent.

Val: Something I look for to know if my coaching has been successful, is the client's report about their feeling - their frustration level in particular - because my clients happen to be the tough people and one of the behavioral changes that we talk about up front is can they actually behave differently with the team. They are driving the team and not letting other people make decisions. They're very hierarchical and dominant and when they're like that they're very frustrated. Often it is what brings on the coaching.

An example of a success was a client I have who talked about trying to drive forth a proposal and people just were not buying it. So he went to a meeting and his report to me summarized how he changed. He went from thinking he was the smartest person in the room and everybody else is stupid to letting the team make the decision and to step back and observe realizing that "they got there." It may sound like a small thing to people who are not so driven, but to him that was a big thing. That was success, so we both acknowledged that as, "OK, you got it." progress.

Bob: The intention around today is point versus counterpoint so here's a counterpoint. Which do you believe: a) The client is the organization or b) Your client is the coachee? My belief is that the organization is my client. They're the ones who are paying the bill. The benefactor is the coachee.

So how do we measure it? I ask the coachee "Where are you now and where do you want to get to?" Then I follow up with "How do we define that?" Once we define that we sit down with that person's boss. We share that and ask the boss, "What's missing and what do we need to put in the plan?" And when we've worked out the plan, then I ask both of them, "Give me a number from 1-10. How's Bill doing right now? What's the number?" Have the two of them pick a number. It's not always the same. In fact, I can't remember if it ever was. And when we get together again later we have a three-way conversation about how it's going, I ask them again, "Give me a number now and let's talk about the difference?"

Joan: Have you ever cut off a coaching engagement early? And if so, why?

Val: Unfortunately, yes. There are times to cut it off. Sometimes it's very obvious because of the client. Even if I know it's not a financial matter and I've been paid, if the client isn't showing up or is showing up late or isn't doing anything then, to me that's an indicator that they're not engaged. I'll ask the client what's happening. I will point out he or she has been late the last three times out of five, and ask "What's going on?" If they continue to be unengaged, then I'm out.

This is no fun for me. It is painful to try to coach someone who doesn't want to be coached. And from an integrity point of view, that's not why I'm working. I'm doing this so that I can try to help somebody make a change.

So that's one reason to cut it off. The other reason is - and this is going to go into our point counterpoint - I feel that the organization is not behind what's going on because, and this is kind of ugly, but behind closed doors, there are sometimes when an organization says all the right words about why you're there, as a coach, but they really don't mean them.

"We want this person to be successful," does not translate into a need for remedial coaching. In fact, I ask if the person is worthy of promotion. Otherwise I'm out. And in this case the client said all the right things but once I got inside I found that the boss is actually not supportive of the person. He is saying he is supportive, but during the coaching when we do the updates, they're pointing out all the negative things the person does wrong and they're not helping other people come back to the person to give feedback. You start to hear some subtle things that tell you the organization is not aligned behind what they say they're doing, even if they say the right things. So from an integrity point of view, I quit at that point.

Linda: I've had a couple of situations where I have fired myself from the work I was doing. The cause has almost always been related to contracting. Contracting is so critical. Coaches need to be aware of demonstrable behavior. You must know how that behavior is demonstrated. How are other people on the team going to support that person if that person is worthy of promotion? And then think in terms of the initial contract.

Joan: This last question in level one is how do you prevent clients from becoming dependent in the relationship?

Bill: First of all, effective coaching involves learning. Effective executive coaching requires both my client and I to be in a flow experience. One of the ways I tend to increase flow is by helping to create a threshold between overwhelming challenge and anxiety on the one hand and boredom on the other. While coaching in the midst of this threshold, I tend to make use of what I call an appreciative perspective. It becomes my job to help the person I'm coaching identify moments of strength and conditions of success in their work. This contrasts with a deficit perspective which encourages a coach and client to focus on weaknesses and failures.

The second piece of advice is that I avoid advice-giving. I do something called advocacy-inviting-inquiry. Don Schön and Chris Argyris first made use of this process.² They suggest that if you give advice it should not be stated in a manner that leaves the client with only two options: to take or leave the advice. Rather, the advice should be given in a manner that elicits a dialog. Hopefully, if our dialog is at all rich and effective, my client ends up using my advice as a springboard to determine what she actually needs. By taking this tack, I'm decreasing the chance of client dependency.

Mary Beth: To decrease client dependency I give them a process they can replicate. I have found that the most important process for leaders to replicate is getting clarity. They must be clear and certain that others understand them.

Secondly, get commitment. Give them processes where they can replicate those two very important pieces of their work and then help the leader build in self-correcting mechanisms. Finally, get straight feedback. If I can help them transfer that from our conversation to the conversations in their own workplace, their need for a coach is reduced and they are able to take straight feedback non-defensively and welcome it.

Linda: We learn best when we're teaching others. So to keep someone from being dependent on me, I require that they select someone else in the organization that

they are mentoring or coaching and have them focus on how their behavior and their knowledge can be translated to their own teaching and coaching. This keeps them distanced and independent from me.

Val: I try to give executives things they can do on their own. I don't want to have clients that are dependent on me. What I do try to do when I am coaching them is to repeat certain questions in the same way over and over again. They are questions like, "So what role are you playing in this thing," and "What is the impact you're having that you didn't intend to have?"

I ask those questions over and over so they don't become dependent on me or call in between sessions. Since they know I take this tack, they tend to start asking the questions themselves.

Level #2 – On the Topic of Colleagues

Joan: You have listened to some "behind closed doors thinking" about clients, now we're going to discuss colleagues.

There are four issues our panel will focus on:

1. Gathering data outside a client's internal sources
2. Working only at the top of organizations
3. Blending coaching and consulting
4. Defining professional boundaries

1. Gathering Data Outside a Client's Internal Sources

Mary Beth: Here's a real world case. We have Tom who is a senior vice president of a mega-million dollar company. Jim is the CEO and his boss. They're personal friends and Jim has heard some troublesome news about Tom. Tom's direct reports feel bullied by Tom. They basically withstand meetings with him since he tells them what to do, which has caused disgruntlement. They believe Tom insults their intelligence and so what this has caused is a lot of venting and triangling among the staff. They have gone to human resources, and HR told Jim. As a result, Jim is bringing in a coach for Tom.

There are a couple of assumptions in the case I want you to be clear on and one is that this is not a first-time coaching in this organization. Also, Tom does have time to develop, it's not like he's one foot out the door and the coaching will be time limited and monitored, so it's not the kind of thing that goes to go on forever.

Joan: Here's how I would approach handling it. I believe as executive coaches, we need to go with our strengths. One of my strengths is listening. And I would begin by having a conversation with the CEO to learn more about what he wants for Tom in his leadership, in his behaviors, and in his results. I would also have a

conversation with Tom to listen and find out what is really going on. What are his personal aspirations and what does he know about the feedback that he is getting.

I would collect data from all of the stakeholders: peers, direct reports and formally with Jim, the boss, through a 360 process. I would also do interviews, separate conversations, so that I could listen for what is going on. Listen for the behaviors that are happening for Tom and then sit down with Tom and Jim and together contract for a development plan going forward that includes what success looks like, several targeted behavior changes and then have Tom get back to his people and invite them to be part of the process.

Two people that have influenced me in this perspective are Marshal Goldsmith and Alyssa Freas. In their work entitled *Coaching for Leadership- How the World's Greatest Coaches Help Leaders Learn*³, they talk about coaches creating a team of people who are not just us, coaching the executive, but getting the organization to join in on the success of Tom.

Mary Beth: The counter-point here is how to get the information back to Tom, because this is a blind spot for Tom. So, I hold a stand in my own practice which is not to do, not to be an initiator of indirect feedback, like 360's. I believe there's too much indirect communication that is already happening in organizations. So I don't want to initiate another system of indirect feedback. What I will do instead after talking to Jim and Tom is set up a process where Tom is thinking of a series of questions he wants to ask his team. Then I will talk with each team member individually.

First there is a kick-off meeting where Tom is talking about this process and what my role is. Then I'll have an individual conversation with team members. I call them prep sessions. I'm prepping them to be able to talk straight to Tom. And the key there is to go from venting to specific behavior descriptions. So they are not going to go into the sessions and say, "Tom you're a bully." But they're going to say, "Tom when we talk, you talk 80 percent of the time and I talk 20 percent of the time. You ask me closed questions where I am only answering 'yes' or 'no.' I would like you to ask me questions about my thought processes. That would be the difference I would like."

I have a coaching contract in those sessions, so we have three way sessions where Tom's talking one-to-one with each of his direct reports and I'm there to coach each of them. Tom may be real defensive and needs to listen to the straight feedback his direct reports are giving. The straight behavior descriptions are important and they relate to a series of action plans I use to do some live

coaching with the team to help them actually break the pattern.

2. Working Only at the Top of Organizations

Val: Here is another case. Imagine you're in a situation I was faced with several months ago. You're the coach and you get a call. It's from a marketing company that is a subsidiary of a large national corporation. It has its own CEO, so it's like its own company. The problem is this: the company has done employee surveys over the last year or so; satisfaction is dropping. It has dropped more rapidly than in the past and there are three main issues.

One issue is that employees feel like the managers are not telling them about the big picture, what's going on in the company.

Secondly, the employees are not getting feedback about their own performance and they want feedback. A big indicator is that performance evaluations are not done on time, if at all, during the cycle.

The third issue is that people don't feel empowered. They won't let them make decisions so they are starting to lose talent. There is a CEO and four vice presidents. So the call that you get requests you to come in and coach the four vice presidents and possibly work with the team. It is a six figure contract but the CEO does not want to be coached.

The question is, do you take the job or do you not take the job? I'll start by revealing my bias because one of our questions is, do you know your own biases as a coach, so my bias is the answer to that is no. If I can't also coach the CEO and the president, I don't want the job. Even if it's a high-paying job and it's a great company. I have three reasons for my decision. One is about the coaching itself: I think that you have to coach at the top because power and influence flows from the top.

Secondly, I don't want to take a job that I think is almost guaranteed to have a mediocre result at best. I don't want that.

The third and final reason is a style issue. I think even if you're new as a coach you have to possess certain personal standards concerning the person you are going to be and when you are going to walk away from a contract. You also need confidence in yourself that you can attract the right kind of clientele and you know the correct times to say no.

Bob: I have need for a point of clarification. Did you say the contract was six figures?

Val: Minimum, minimum.

Bob: Counterpoint, my answer is yes. And this is one of the major issues in our profession. We all want to survive in this profession. How often will we look at an opportunity for that kind of money? I'll go do it. That's not the real reason we go do this anyhow, but I like the idea....it's a great starting point. I believe that if we've got four vice presidents and the opportunity to coach four folks who can have an impact on the organization, my answer would likely be yes. I'd want to have the opportunity to meet those four. I want to determine if any of those four are a match for me or if they're a match for one of my other coaches and that our intention is to help them be more successful including a process called coaching upwards. That's how I coach that jerk that's on top. Using that, there's a great opportunity to develop that person.

What we look for is long-lasting relationships with developing leaders. Now that I've been at it a long time, I can look back 20 years and see some of the young leaders I coached who are now the CEO's of organizations. If we are going to help senior leaders shift cultures in organizations, we need to coach them.

Val: The important part of what you said is that those vice presidents are going to go on to be CEOs elsewhere. So I think what I walk away from is a chance to make corporate America a better place. Maybe that would still be good work. However, the honest truth, I'd still be nervous about my reputation as a coach is if doesn't go well.

Bob: The one thing I would add in this situation is that if the CEO or the four vice presidents were remedial situations, my answer is no. If I go in believing that coaching is really only about money, I'll go in there and my coaching simply won't work. My experience tells me about one in ten situations like this will work. So the thing you need to be concerned about is your reputation. If you want to see your reputation go down hill fast then take remedial jobs as your entry into the relationship with an organization.

Val: On that we agree.

3. Blending Coaching and Consulting

Bill: I have a third case to present. It is a health care system and I have the privilege of coaching a gentleman who heads this system. He is a physician which is very unusual in healthcare these days. Most of the time in healthcare, leadership is bestowed on people with very strong managerial skills but little direct knowledge

regarding medical procedures. He is a wonderful exception to this rule. I have been coaching him for about 2 ½ years and it's a very close relationship. I believe I can be of real assistance.

This healthcare system is part of an even bigger system. My client's system generates about 40 percent of the revenues of the big system. With his vice presidents, my client decided to do something about the estrangement between his own unit and the parent company. His group did something remarkable. They agreed to take partial responsibility for the alienation between themselves and the bigger system. Further they agreed to ask those in the parent system about what could be done to improve their working relationship.

If I were to work on this very interesting project, I would no longer be a coach. I'd be moving into consulting. I'm sure some of the people in this organization already think I am too powerful. I'm the man that comes in to meet with their physician leader and give him ideas. I told my client that if I did the consulting contract I might be viewed as even more powerful. I indicated that he needed to get someone else. However, he said, "You're the person I trust to handle this. This is a very delicate situation. And I trust that you can manage this process." He knew that I have done a lot of consulting. But I found myself caught in a dilemma. Should I take on this additional role? Do I begin to do violence in some way to the coaching contract? Do other people begin to be fearful of me and the influence I have in the organization? Do I take on the consulting contract as well as the coaching?

Jeannine: So what do you do?

Bill: I don't take on both contracts. I only take on the coaching. I need to be very careful about the power gradient in the organization. The way I can be most helpful to him is by focusing solely on his perceptions and his work. Much of the time during my coaching with him is devoted to the management of complexities. He is leading a large system that is fraught with unpredictability and complexity. So much of my role is helping him sort through this remarkable swirl of events. If I were to start engaging in the consulting process, I would get distracted from the fundamental relationship I have with him.

There is a second dimension to this dilemma. My client and I devote considerable time to the issue of succession. He is a man in his early sixties and wants to leave a legacy in this organization. What difference is he going to make in this organization and how long is he going to stay? If I begin to get into a consulting relationship, these fundamental issues of succession and legacy are likely to get lost. My client often forgets about himself

and his own issues. I think the consultation would distract him from these personal issues and our coaching relationship. In addition, I would have all this additional data available to me as a consultant. It would be even more likely that I'd come into the coaching session with my own biases. Then, my client would have to deal with my interpretations of his reality when the focus should be on his own interpretations.

Jeannine: My position is that coaching the individual alone may not be enough. They interact within a system and in some cases it's appropriate to also coach "the system". The subtext that Bill has pointed to here is a blend between coaching and consulting. Where do they blend? How do you keep them distinct? When can they be blended effectively?

In response to the coaching versus consulting point and counterpoint, Bill and I are really quite close on that. We have to be very clear to know our boundaries and our distinctions. When am I coaching? When might I slip to a consulting observation? Even when consulting, I'm not directing, I'm not telling "the answer". I simply give observations on what I'm seeing, leaving it to them to be coached into how they're going to use the information. So knowing the system as Bill does, he's recognizing that it could be dangerous for him blend, so we're back to contracting. In this case I would contract to be the lead coach and engage a specialist to work with myself, the CEO, and his VP to help identify and close the relationship gap. My role then, as lead coach, would be to hold the CEO accountable for executing the behavioral choices based on the process consultant's expertise. That way I'd be supporting the ongoing systemic long-term change as lead coach yet be distinct from the actual content or process consultant.

My point being that coaching is not enough. In the complexity of the organizations and individual with which we work now, they can't live in a vacuum. So if I'm coaching them to behavior change, we've worked it out and we may have role modeled it. The individual then goes into a team meeting and they try the new behavior. The system, the team, often won't let that new behavior stand.

It's amazing how many times I see the changed behavior just being ignored. So there's a point in the dynamics of the team, as one of the closest groups around an individual, where education is needed. The exec will often be coached on how to educate the team, that system, on what the exec is working on and the desired changes, and in fact, the exec will then enroll the team in helping the new behavior be sustainable.

What does this mean for a coach? Our stand at CoachWorks is that a coach has to be a continual learner.

You've got to know your boundaries and your coaching abilities, but you also have to know where to reach for additional resources. Even as an individual no one lives in a vacuum. So coaching only the individual often isn't enough to get the results desired. As a coach consultant, I have very clear contracting boundaries that I must be consistent with and know what I should and shouldn't be delivering.

Bill: Two additional points. Each of the vice presidents in this organization also has a coach. My consulting contract could make this multi-tiered coaching process more difficult. Currently, I must work closely with other coaches, yet preserve the confidentiality of conversations between myself and the CEO. There would be additional problems of confidentiality if I was also a consultant in this organization.

I suspect my fellow panels would agree with my second point. Coaching is the most powerful work I do. I've had more influence with this client than I ever would have had as a consultant to his organization. Coaching is seductive. So, when we combine coaching and consulting, we need to be very careful. We may have obtained a consulting contract in part because of the very special relationship we have with the person we're coaching.

Jeannine: So the point-counterpoint for everyone here to be thinking about is are you a coach, are you a consultant or are you a combination of both? Do you work with the one individual, or do you work with the systems around them? When and when not?

Bill: If you split coaching and consulting, what's the nature of the working relationship with the people who do the consulting? I have had one relationship where I served as coach and two other people served as consultant and therapist. This person was head of a high tech firm and had hired a therapist and consultant, as well as me as coach. He found value in all three relationships. So what should be the working relationship among the three of us? Is it appropriate for the three of us to talk to each other? How do we do this in a way that doesn't violate confidentiality?

4. Defining Professional Boundaries

Linda: Shifting gears a little from the point versus counterpoint format, Klaus and I would now like to touch upon the issue of professional boundaries. I'm going to describe a situation involving Klaus and he will share one about me that I think you'll find thought-provoking. This is not information we would share openly with clients, but they permeate how we work and hold real significance in terms of the choices we have to make as coaches.

The first situation has Klaus coming out of a sauna in Germany. He comes face-to-face with a client and has a conversation since it would be very difficult to just walk by without speaking. At the time, they both happened to be naked. The client happened to be a woman.

Klaus: Here is how the story ends. Neither of us suggested moving the coaching sessions to the sauna in the future.

Now here is the situation concerning Linda. She is very careful about contact with her male clients. She wouldn't take a ride with a male client in his car from the airport to his office or a hotel where the session is going to take place. The question to consider here is how do you deal with boundaries when things happen like my sauna experience or simply preventing a client from crossing the boundary?

Linda: I urge you to give the issue of professional boundaries considerable thought. It is very important for each of us to define our beliefs and values and establish how your boundaries interact with your work.

Joan: We've got one more topic to discuss – our own careers.

Level #3 – On the Topic of Our Own Careers

Joan: Our first question, "What is the most gratifying way you care for your career?"

Klaus: What I find most gratifying is working with a coach myself. I chose one who is not German.

Bill: I have observed (and several other coaches with whom I have discussed this matter concur) that as mature men and women move from an orientation toward success to an orientation toward significance in their lives, the primary factor determining the quality of this transition is the support received from their significant other. So for me, the most important thing is my wife's support for my efforts to leave a legacy.

Jeannine: What's really gratifying to me as a coach is to find an individual who grabs onto their own possibilities and truly starts self-coaching and modeling their growth for others. They are up to something bigger than themselves. You get to see the sustainability and the thumb print of your work. Yet you know that they're going to make your work even better and more applicable than perhaps you ever imagined.

Sometimes I get out of bed just wondering how do I get to do this work, how did I get so lucky? We have quite a responsibility and accountability to keep ourselves sharp, to keep coming to conferences like this, learning,

applying our learning, and constantly growing as individuals and executive coaches.

Bob: Gratification for me is having a great group of coaches around me. I would encourage all coaches to not just get fed once a year when you come to these conferences, but feed each other. Look for opportunities to be together. If we're going to talk about collaboration, the best way to do that is discuss how collaborative we can be as competitors.

Val: For me the most gratifying part of what I do as a coach, it's actually not the bottom line but rather when I'm having a conversation with an exec that is the kind of conversation I know he is not having anywhere else. If you ask me what hits me in the gut, is when we're talking about running this organization and he has thousands of people he is responsible for, how am I going to put my stamp on the organization in a way that makes a difference. For me to have no answer but to be able to be provocative in the conversation, what is cooler than that?

Linda: One of the most gratifying things I know is to have people like Klaus who will get in my face and tell me I'm off-base since I don't seem to have enough time to get everything done. To have coaches around that are willing to challenge you and give feedback is really exciting. The one thing I love with clients is seeing or hearing the lights go on. You know that something important has just happened. When the lights go on, that is very exciting.

Mary Beth: One of the things I find most gratifying in my work is what I call the jazz improv of live team coaching. We only generically know what's going to happen in any given team environment and I love that about the work. I love being with people as they are trying to really make a big change, are dealing with their own anxiety about it and so we're there to just basically help them contain their energy enough so they can tolerate that anxiety so they can do something new. What I find gratifying is once a month I get together with a colleague of mine and we get to whine about our clients and I get to vent. I get to say really inappropriate things and then we get down to business. It is just so clearing.

Joan: What worries us about our own coaching style?

Val: What worries me about my own coaching style is that I've been a coach for nine years and I do most of my coaching by phone. On the Myers Briggs I'm an INTJ, so I am very introverted. It's almost like I'm only extroverted when I'm paid to do so. The connection is really important and it's taken me a long time to reach out to other coaches and be more connected because

you know, I'm just like those people I coach, I'm that loner, I want to do it my way and think I'm the smartest person in the room.

I think who else could do it better? So I built my practice in a very solitary way and I guess what I'm learning here this week is hard for me because I am introverted. There have been several times I've gone back to my room and just stared at the ceiling because, you know, this is not my natural thing. However, the good news is that I am learning. I had a great conversation with Bob about not doing it alone. And for us natural loners, that's kind of a big deal.

Linda: What worries me most about my coaching is that I'm going to be found out that I am really a fraud. Does anybody else feel that way? I didn't come in through the same route that most of my esteemed colleagues did. I was a stay at home mom up until seven years ago. So I've had a very steep trajectory to get from there to here. I was coaching as I was in the final years of that parenting part. The other thing that has really worried me is about being stale, getting stale. And that's why I think these conferences and having dialogs and really having people in our faces is so important as not to get stale. And the third thing for me is not to get bored.

Klaus: What I will add is that I'm not a worrying type at all concerning coaching. I completely trust myself. I trust the process and also trust that I'm going to make mistakes in the coaching process. Then I look at them as a learning point and bring them back openly into the coaching process. The client and I can learn from a quality dialog.

Bill: What worries me is that I have had more impact as a coach than I ever did as a consultant. It's easy to think I'm special. I think that narcissism--the sense of being full of myself--can get in the way. So realizing I'm a fraud every so often is good for me--though I'm not sure I'd want feedback from everyone in this room to confirm my fears! But I need to puncture my ego on occasion and keep myself grounded in recognizing what I can and can not do.

Jeannine: Our client's world is hugely complex. I worry that since I'm not in their shoes daily, that I am missing things that clients are caught in that I should know about.

I feel as though I should know where I am missing it, what it is I'm missing and am I delivering the best that I could for my client? How do I scan enough all the time to be certain I have at least the pulse of what's going on and can speak to it or call for it when the situation demands?

Joan: Everyone, ten years from now, 2014, what do you want to be doing as a coach?

Bob: I still fully expect to be an executive coach. I expect that my company will be known as a connector; that we connect the coaches to the organizations of the world. I hope people can find on the www.leadersearch.com website exactly what organizations look for when they do one-stop shopping for organizational coaches.

Mary Beth: There are two things I would love to be involved in and in a way I'm a toddler at both of them so I'm glad this is ten years out. How many people saw the documentary, *The Corporation*? If you haven't seen it, I highly recommend it. The documentary's premise is that corporations are by nature psychopathic. And therefore destructive, and yet I work in them. So I would love ten years from now to have the majority of my business be helping corporations be sustainable to the environment and to its people.

The second thing I'd like to be involved in, and I need to learn a lot about this myself, is let's get back to the idea of the seasons in our lives. Because right now everybody, at least in North America, is full out summer, year round. The fields are never fallow. And I've chosen in my own life to live a more, what I call, European, pedestrian lifestyle which means I chose to live in a place where I can walk to the bank, walk to the grocery store, and I'm on a street where I see the neighbors walk by.

Linda: In 2014 I want to be breathing.

Val: For me in 2014 I see myself giving retreats so I don't think I'll have an individual coaching practice anymore. But I think I would love to be giving a retreat for those senior executives where we have those provocative conversations that I like so much, but not so structured around the business goals because I think they get enough support with that. But just a retreat that they would come to for a weekend or a week and talk to other senior executives in small settings. Not a hundred people, but more like 50 or 25 execs at a time, and really look at, you know, what are we doing?

Joan: What legacy do you want to leave to your clients and client organizations?

Jeannine: The legacy and leadership work we do actually comes from my skin - I can't not do it! I'm an only child and have no children. I will have passed through this world and fulfilled my purpose only through what I do, who I am, and who my clients/colleagues have become. My legacy is to be joyful with you, walk beside you, and do what I can in giving the materials that CoachWorks is able to put together so you, colleagues, leverage whatever impact I've been

blessed to have. It really does become, 50 years from now, I'm still doing legacy leader coaching because you are my future.

Klaus: What I would like to achieve is that I would have helped top execs to become true leaders. I also hope I have helped them to identify their core values and live a life according to their principles. I also hope the term "work-life balance" is out.

Bill: Ten years from now (in the midst of my 70's) I hope that I will still be active. I had a wonderful opportunity during the 1970's to help creation a new field of human service--called faculty development--in American higher education. This new field was founded by a group of people who were true innovators and visionaries. Ten years from now or 20 years from now or 30 years from now, I hope to look back and take pride in my coaching work and more importantly in the work of my colleagues. I want us to be able to say that we helped establish a new field of human service--that we've made a difference as organizational coaches!

Conclusion

As moderator of this panel discussion I am extremely pleased to note that our "behind closed doors" approach was an overwhelming success. I felt that the interaction and group dynamics at work during the program were beneficial for panelists and attendees alike. In short, we enjoyed the candor and appreciated the chance to compare our viewpoints against those of our colleagues.

I must thank my esteemed colleagues for agreeing to open up and freely share at a public forum. It takes spirit and pluck to offer up these feelings and perceptions and I'm grateful for their willingness to pull it off. I've learned a great deal from these peers and I am proud to have participated in our second panel discussion.

Perhaps the most important thing I can do before ending my remarks is provide readers of this article with a call to action. Anyone who is interested in furthering the coaching cause by serving as a future panel member should contact Mark Cappellino. He is part of the Executive Coaching Summit group and the new ICCO organization and can be reached at (615) 383-9886. Please let him know you are interested in participating in panel discussions at future ICF Annual Conference events. Thank you.

About the Panelists

Here is brief biography of the executive coaches that served on the panel:

Joan Wright, MCC, was panel moderator. Joan is President of O'Sullivan Wright Consulting, Inc, a firm specializing in Executive Coaching, Leadership Development and Talent Management Strategies. Her business helps companies achieve targeted business results by attracting, developing and retaining key leadership talent. Prior to starting her own coaching and consulting business, Joan acquired 21 years of corporate experience in Human Resources Management roles with Philip Morris, Citicorp, GE Capital and most recently, at First Union National Bank where she was head of executive leadership development. She has a tremendous passion and talent for building the capacity of leaders and companies with transformational change.

· **William Bergquist, Ph.D.**, has served as president of The Professional School of Psychology and as a consultant, coach and trainer of consultants and coaches throughout the world. He is the author of 36 books concerned with personal, organizational and societal transitions and serves as Co-Executive Editor of *The International Journal of Coaching in Organizations*.

· **Bob Johnson**, from Calgary, Alberta, Canada, has been coaching CEO's and senior executives since 1983. He is the founder of Leader Search, Inc., a Calgary-based group of leadership coaches and search professionals. Bob philosophy is that there is a right person for every corporate culture and a right culture for every person.

· **Linda Miller, MCC**, has a decade of achievement in executive and organizational coaching. After many years of operating her own business, the Arizona resident joined the senior team with The Ken Blanchard Companies in 2000. For two years she was Director of Coaching Services. Currently, Linda serves as their Corporate Alliance Executive.

· **Mary Beth O'Neill, MA**, is a leadership consultant, executive coach and author who resides in Washington. She is the leader of the Executive Coaching Training Seminars. Her book, *Executive Coaching with Backbone and Heart*, is one of Amazon.com's best-selling executive coaching texts. She has been an organizational consultant for 21 years and executive coach for 17 years.

- **Dr. Jeannie Sandstrom**, MCC, is CEO of CoachWorks® International has been a business owner and international leader coach since 1979. A Texas resident, Dr. Sandstrom is co-author of numerous leadership and coaching books, articles and tapes. Her broad industry diversification allows her to coach effectively in virtually every area of business.
- **Val Williams**, MCC, has been an executive coach for the past ten years, specializing in coaching senior corporate executives and their teams. From the New York area, Val has extensive experience in the healthcare industry and has authored several executive coaching books and audiotapes including *"Get the Best Out of Your People and Yourself"* and *"Executive Think Time."*
- **Klaus Zepuntke** is from Hamburg, Germany. Klaus is an independent executive and corporate coach with 14 years of international experience in a variety of industries including banking, energy services, manufacturing, communications and health care. His special areas of interest and expertise are dealing with resistance to change, conflict management, value-oriented leadership and executive team development.

To Get an Audio Tape of the Panel Discussion

If you would like to hear a more comprehensive version of the panel session, you can obtain a cassette tape recording online by going to:

www.coachfederation.org/conference/ordertapes

The price is \$22.00. Request product code IFO4EC3AB.

Endnotes

¹ Mary Beth O'Neill, *Executive Coaching with Backbone and Heart*. San Francisco: Jossey-Bass, 2000.

² Chris Argyris and Donald Schön. *Theory in Practice*. San Francisco, CA: Jossey-Bass, 1974; Chris Argyris, *Reasoning, Learning and Action*. San Francisco, CA: Jossey-Bass, 1982.

³ Marshall Goldsmith, Laurence Lyons, and Alyssa Freas (Eds.), *Coaching for Leadership*. San Francisco: Jossey-Bass/Pfeiffer, 2000.

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