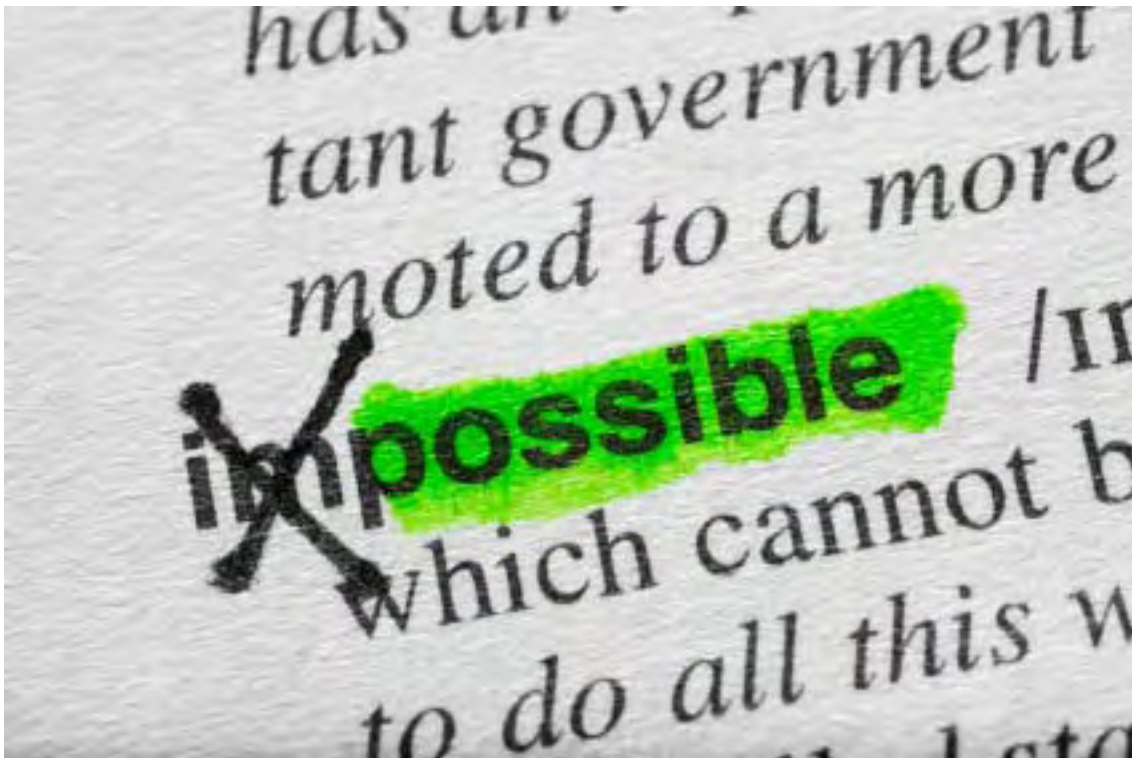




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# Coaching as Organisational Development



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# Coaching as Organisational Development

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# Coaching as Organisational Development

## Editorial

### Paul Z Jackson and Chris Grieve



#### Paul Z Jackson writes ...

It's been enjoyable and instructive working on this issue as guest editor, along with the team. Two teams, actually. **Chris Grieve** and **Jonathan Zneimer** as fellow editors, and the regular e-O&P squad of **David McAra**, **Bob MacKenzie**, **Deborah Booth** and **Ned. Seabrook**. I hope we are returning the journal to them in good condition.

Our aim was to gather articles on the theme of 'coaching as organisational development', and we think we have a terrific set of pieces here that will prove invaluable for anyone with even a passing interest in the topic.

They describe a range of projects that together leave little doubt about the power of systematic coaching interventions within organisations.

You'll notice that all these articles describe interventions at the 'serious' end of practice. It takes commitment, energy and discipline to get real impact and to have confidence in sustainable results. Each project is 'serious' in the senses of:

- all managers getting involved (Maxwell)
- the project team persistently going back and adjusting the process (Waldman)
- careful adapting to local conditions and emergent phenomena (Terni).

Equally, they have the flavour of value-for-money. The consultants and managers describe careful step-by-step approaches, evolving as they go along – many with use of pilots before design of a roll-out. None of the

projects indulged in elaborate analysis for the sake of it. All transmitted skills firmly into the hands of internal staff, so the consultant can disappear and do something more useful as the projects end.

The articles provide plenty of evidence in the form of facts, figures and stories, but these are not double-blind controlled studies – those were simply not appropriate in this context, though it might be fun if PhD students were to find the time and resource to conduct such studies.

While the pieces are more practical than academic, you'll observe that the interventions used (and are sometimes described in terms of) recent ideas – with practical applications of positive psychology, complexity science and other disciplines. They evince a willingness to embrace unknowns (**Karen Maxwell** and others), leading to improvisational responses to make projects work by capitalising on what was already there.

Several of the articles describe consultants taking a solutions-focused (SF) approach to the development of the organisation. This reflects my personal bias towards SF and involvement in the SF community. It is also the result of a good response from the networks from which articles were solicited.

But I'd like to think that the SF flavour also has much to do with the merits of an approach which is explicitly emergent, sympathetic to coaching as a methodology (client-as-expert, lots of listening), and an almost obsessive client-focus ('What, precisely, do you want, and how will you know you are getting it?').

If SF is not your preferred future, then you might explore the systemic modelling approach of **Nancy Doyle**, **Paul Tosey** and **Caitlin Walker**, who apply 'clean' questioning techniques to a leadership group – another example of how attention to detail at a micro-linguistic level will have impacts throughout a system that can show up as organisational developments.

The geographic range of the cases takes us twice to continental Europe, for case studies both using solution-focused coaching as central elements in strategic interventions. **Paolo Terni's** fascinating insights into working life in an Italian Alpine water-bottling plant nicely offsets the atmosphere of **Dominik Godat's** white-collar Swiss setting.

Back in the UK, there are similarly good results within **Janine Waldman's** account of her well-sustained project with JLIS, a leading facilities management company. Janine brings out the importance of learning during such projects, and how such learnings can be made manifest by re-applying them – 'triple looped' – a theme **Vicky Cosstick** elaborates from her experiences as consultant to several organisations, including charities.

These strands are also examined and pulled together in **Jeff Matthew's** thoughtful reflections on differences between external coaches and managers-as-coaches, packed with useful tips for getting successful OD when working with the latter.

Whether the coaches are internal or external, it is important to prepare the coachees, and **Caroline Taylor** offers us a brisk and thorough canter around this previously-neglected topic.

And what of the coaches' skill levels? Their training apparently ranges from brief courses of a few days to an eight-month period, culminating in a Level 5 coaching qualification from the Institute of Leadership and Management (ILM). (Southern Railways, with **Gill How** et al), yet it is apparent that the best measure of a coach's skill is their impacts on the organisations.

Within these OD studies, it is tricky to tell the personal development impact on individual managers, or to know what would have happened without the coaching elements. And of course whatever happened last time doesn't tell you what to do next time, when circumstances and the people involved are complexly different. So the best learning for us - as developers, leaders and coaches - is in these stories themselves.

### Chris Grieve writes...

When Paul Jackson emailed seeking volunteers to help his mission as guest editor of this edition of e-O&P, my virtual hand shot up. The spark that ignited my interest was the notion of publishing stories of significance that demonstrate tangible links between coaching and organisational development (OD).

The idea that working with people on a one-to-one basis is somehow different to OD always struck me as an erroneous distinction. Coaching can be vital OD work. Person-centred, yes but organisationally-oriented also. The connections, in my mind, are contextual and systemic. If one multiplies many one-to-one coaching conversations that are linked to organisational change-related intentions, within a particular organisational context, the resulting patterning of conversations may lead to emergent change at a system level.

That this might not be entirely predictable or measurable in a linear way can be a real challenge for some. However, it speaks volumes about the complexity of human dynamics in organisational life and the potential that lies within and between people to affect tangible change in organisations through ongoing conversations. While for me this highlights the challenge we coach/OD practitioners face when attempting to communicate the potential value of such work, it also throws down the gauntlet for us to make our work meaningful and impactful for our clients (whether we're working as internal or external coach/OD consultants) both personally and organisationally.

Reading and offering editorial comment to three of this issue's authors has been a rare privilege. I have learned much about the practical application of systemic coaching interventions as tools for change in complex organisations. Each author has demonstrated, in their own voice, some of the challenges they faced, the approaches they used and the lessons they learned. Sharing their narratives, I hope, will add to all our understanding of the value of coaching as important OD work.

### About the authors

**Paul Z Jackson** is an inspirational consultant, who devises and runs training courses and development programmes in strategy, leadership, teamwork, creativity and innovation. His expertise in improvisation, accelerated learning and the solutions focus approach has attracted corporate clients and public organisations, ranging from Ashridge Business School to Procter & Gamble, from local authorities to top five accountants and Greenpeace UK.

After ten years experience as a journalist with the Thomson Organisation, he worked as a freelance contributor to national magazines and newspapers. An interest in comedy led to script-writing commissions and a post as senior producer with BBC Radio Light Entertainment. Working as a script-editor and producer, he introduced dozens of writers to their first professional contracts.

In addition to his extensive corporate work, Paul has taught and lectured at the London Actors Centre, Bath

Spa University College, Cranfield, Ashridge and Exeter schools of management. His books include: *Impro Learning*, *58 ½ Ways to Improvise in Training*, *The Inspirational Trainer* and as co-author *The Solutions Focus* and *Positively Speaking*

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**Chris Grieve** is an independent executive coach, organisational and sustainable development consultant. Since setting up her company, Meridian Prime, five years ago, Chris has coached CEOs and executives in environmental, humanitarian, entrepreneurial and consulting organisations. She has consulted for organisations and teams on strategy, leadership development and learning and development programmes. Chris facilitates strategic retreats, bespoke training programmes and organisational development interventions. She has presented keynote speeches to international audiences numbering in their hundreds and delivered bespoke train-the-trainer and public speaking programmes to more intimate gatherings.

For over 20 years she has combined her passion for making a difference to people and planet with her work in the world. To this end, Chris has worked beside world leaders in science, business and government and with environmental activists and change agents in the field of marine conservation and sustainable fisheries. She now combines consultancy and research on environmental impact and sustainable development policy solutions, with facilitation of dialogue relating to environmental decisions.

Chris is passionately committed to her own development. As 2010 draws to a close, she is completing her research dissertation as part of a Master of Science degree in People and Organisational Development at Roffey Park Institute (affiliated with University of Sussex). Her research focuses on the solo practitioner of OD and how one's identity and instrumentality can help or hinder the growth of an independent OD practice.



# If the answer was coaching what was the question?

## Karen Maxwell



The author Karen Maxwell is an independent leadership and organisation development consultant, the client, a global automotive company. The company recognised the need to develop their organisational capability and decided to do this by developing a coaching way of leading. Developing the coaching capability of the managers who could, in turn, support the development of their team members would have a double hit. Culturally this was quite a challenge as the organisation is still transiting from being a command and control type of organisation to one of empowerment. The approach taken was to systematically

roll out a development process to all 2000 managers including all the top executive teams. This article is written as a conversation between Karen and the client, to emphasise the experience from the client's point of view.

### Keywords

Coaching, organisational development, leadership development, organisational culture, culture change, action learning, GROW model

**What did you believe that coaching would bring to your organisation?**

### We need to go back a bit

We need to go back a bit and understand where the organisation is, or was, four or five years ago. We were firmly a manufacturing led organisation - we sold what we could make. We needed to move to be more market driven. This required two key changes, probably many others, but from a cultural perspective we needed to apply the same discipline and processes to our commercial organisation as we apply within manufacturing and we needed to be more responsive to the market – swifter innovation, rapid and responsive manufacture of those innovations. We were also moving from being quite decentralised (a raft of local country brands) to being more regionalised and in some cases global, again driven by the demands of the market.

**So what needed to happen to support this cultural change?**

### Our leadership focus

Our leadership focus and the response capability of our people. We looked at this in a number of ways and learned some lessons en route. Firstly we developed a 'High Performance Leader' model. It looked great on paper but needed to gain

some teeth. Over the last three to four years we started to measure one of the four dimensions of this model – Building Organisational Capability – in the performance reviews of our more senior people. We are very much a culture of what gets measured gets done. However, measurement on its own wasn't really going to change behaviour. This is where coaching came in. It would potentially provide the tools for individual managers to develop the capabilities of their team members. We started to offer coaching skills development to managers as part of their development, but at this stage it was done on a somewhat ad hoc basis, other than in the eastern part of Europe where the commercial team took a more systematic approach.

*Did you see a difference between the more systematic approach and the ad hoc?*

### **The power to influence culture**

Absolutely – this gave us a key insight into the potential of introducing coaching in a systematic way. It had the power to really influence the culture.

*How did you do this?*

### **Kickoff workshops and Action Learning sets**

We put all the managers through a one to two day kickoff workshop and followed it up with a series of four to six Action Learning Sets. Not only were people developing their coaching skills but they were also working on real business issues, and recognising that often taking a coaching approach had enabled them to gain a breakthrough in their business issue. This latter aspect certainly helped us to gain buy-in to the approach and the time commitment required. The cross-functional selection of Action Learning Set members also helped to enable real insights into other parts of the business, leading to more awareness. And we built trust as members opened up about issues that really bothered them.

We also built into the kickoff workshops a session getting the group to consider how they would take the process forward within their own functions.

*What did you learn from this approach?*

### **Real benefit and real change needs a systematic approach**

To gain real benefit and real change, we needed to take a systematic approach – top-down implementation, full commitment to a process of follow-up Action Learning Sets, and the importance of demonstrating the business case.

*So how did you describe the business case?*

### **Coaching became a 'business conversation' tool**

We helped participants understand the changing nature of the business context, using the model below (see Figure 1). Basically, the model shows that change is needed, where speed and complexity render the traditional hierarchy too slow and reliant on senior level expertise. In order to speed up decision making, people further down the organisation need to be empowered. In order to facilitate cross-boundary discussion, we need to be able to have more effective conversations across all levels. We found in practice that many people in our organisation could

relate to this – recognising that on a day-to-day basis a high percentage of their transactions were with people outside of the reporting line. This helped them to see coaching as having application beyond the immediate boss-employee situation.

Thus coaching became a 'business conversation' tool as well as focussing on development.

### – the change in the way we influence people –

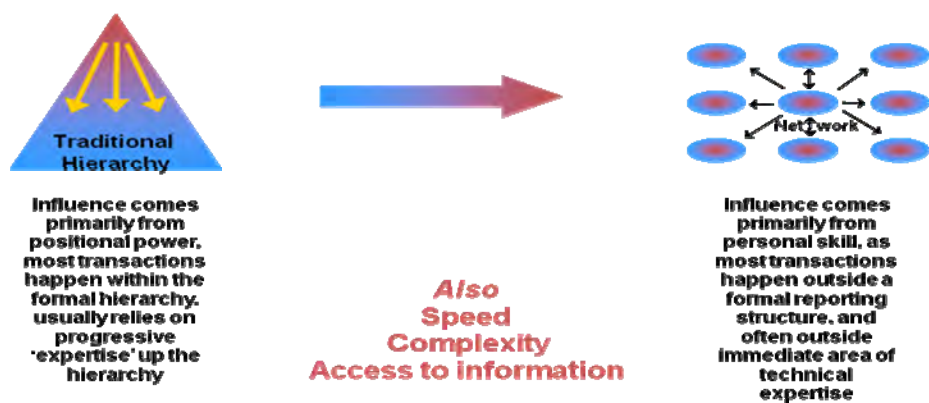


Figure1: The need for change – ©Karen Maxwell Consulting Ltd 2009

### Some serious commitment

*Once you'd decided to take this broader implementation approach how did it look?*

We kicked off in September 2009 with a shorter version of the workshop for the Executive Committee. To give them something of a taster, but with real experience of the practical sessions. They bought into the approach and endorsed the roll-out which comprised of putting nearly 2000 managers through a development process – a kickoff workshop of two days followed by minimum of four times four hour Action Learning Sets. They also endorsed the approach that we were very keen to adopt, of using a mix of external and internal facilitators, requiring some serious commitment to making the right people available to be trained up to act as facilitators.

CMI, one of our business partners in this process, are strong advocates of using video for the 'real plays' (so called because we use participants' real work situations as the subject for discussion). This proved immensely powerful for our leaders, when they had to face up to seeing that maybe they still had something to learn.

At the centre of the training was the Whitmore GROW model.

The pilot of the programme took place in October 2009 and the target was to have everyone trained by the end of 2010!

### Some structure and a sense of direction

*You mentioned the GROW model, - what has been the*

I think that many people felt that after they had been through the training, they weren't starting from scratch – that they had already been using some of the coaching skills. However the GROW process was really helpful giving them some

**reaction to it?** structure, and a sense of direction. The comments we have had during our Action Learning Set meetings were that they find GROW to be a flexible process owing to its iterative nature. They also become increasingly self-aware, recognising that during some discussions, if they are running into difficulties, they may have to 'retrace' their steps, having skipped over a step.



Figure 2: Getting up close & personal in observed and videoed coaching sessions

**What do people struggle with the most during the training or development process?**

### **Asking questions can feel strange and uncomfortable**

During the initial kickoff workshop they struggled operating in the 'consciously competent' phase of learning. It all feels very artificial. The practice of asking questions rather than telling can feel strange and consequently uncomfortable. To reduce coaching down to 'it's simply about asking questions' is overly-reductionist, but for some of our incredibly pragmatic managers it became a useful short-hand.

After the kickoff workshop the greatest challenges were sustaining any changes in behaviour, in the face of reactions from startled colleagues, and finding time to 'do coaching' and to schedule Action Learning Sets. These issues highlight the key challenge in implementing what is amounting to a culture change within our

company, making it normal to **ask rather than to tell**, and inviting employees to take more responsibility.

### **Getting people to think and act differently**

*Tell me more about those challenges.*

The challenge is about getting people to think and act differently and approach development in a different way. What has been different? A number of things, namely:

1. Planning to train 2000 managers with very little available and appropriate internal resource.
2. Taking a cascade approach, where even the most senior people have attended at least a one day practical training – not merely a briefing or taster.
3. Developing internal capability to deliver a psychologically demanding training, and taking the time to do proper ‘Train-the-Trainer’ and Master Facilitator classes
4. Getting people to integrate what they see as a ‘people management tool’ into their real business issues through the ‘real plays’ (as opposed to role plays – people are working on their own real issues, rather than adopting a role) and Action Learning Sets.
5. Sustaining the commitment – which is still a challenge!

### **Asking rather than telling**

*In what way is the culture now different to how it was a year ago?*

Maybe it is a little early to say, and we don’t yet have robust data to support this, but early anecdotal data shows some key changes. Firstly there is more of a common language, and the common practice of asking rather than telling, even if accompanied by some humour, is more prevalent. Individuals describe higher levels of empowerment and involvement. Colleagues now find it easier to challenge each other. An additional by-product has been that a number of management teams have valued the Action Learning Set environment, and continue to meet, less to overtly practice coaching skills but more to discuss issues they might have with a team member.

### **A symbiotic relationship with our structure**

*What do you believe exists already within your organisation that supports the implementation of coaching?*

The fact that it is directly linked to our capability dimension of ‘Building Organisational Capability’ is key. There is a symbiotic relationship with our structure, the increasingly regional/global cross-functional structure. The structure needs a more open/questioning style of interaction and in turn this style facilitates the structure.

We also have a history of success in large scale cascading implementation, albeit primarily within manufacturing with our Six Sigma/Continuous Improvement system and our safety training. We are currently looking to further integrate coaching into

the Continuous Improvement system so that they reinforce each other.

### **Still quite hierarchical and bureaucratic**

We are still quite hierarchical and overly bureaucratic. Our Performance Management Process currently may inhibit people from talking openly about development areas. We are quite impatient, excellent at starting initiatives but not so good at seeing them through.

*Are there any barriers – systemic or cultural - that could impede implementation? How will you address these?*

Hopefully the increased practise of coaching will help to reduce the impact of the hierarchy. Our performance management process is currently under review. Frankly we missed a trick at getting the sign-off from the Executive Committee last year, and really laying out what the full commitment looked like, both from a participant point of view, and from developing internal resources. Also from follow-up and evaluation. Hopefully we can build that 'on the go'.

### **A tremendous learning experience**

For all of us it has been a tremendous learning experience. Very few of the internal facilitators had experience working on such a deep psychological training, and we've all learned a lot from each other and the team of external partners (see below). The workshop was designed in such a way that it was very trainee-centric, very little of the time was spent in trainer-led sessions. But the practice of running break-outs - managing video/non-video feedback, building openness in the groups and dealing with a lot of challenging questions - stretched many of us, probably much more than talking through lots of PowerPoint slides! This was particularly true for a number of colleagues who weren't even working in their native tongue.

*How have you developed as professionals through this process?*

Even for the more experienced of us, the concept of an Action Learning Set with no prescribed agenda or content was quite daunting, a trip into the unknown. Following an initial Train-the-Trainer, which focussed on the kickoff workshops, we ran a Master Facilitator session, for a subset of internal trainers who were starting to manage Action Learning Sets. This was a great two days – again lots of unknown territory, where the participants were set the task of defining the agenda – modelling the Action Learning Set. As a good example of managed experiential learning it couldn't have been better and we saw a number of light bulbs go on, even for the most experienced amongst us.

Another key learning for us as a company, was that we shouldn't expose our colleagues to the stress or risk associated with delivering this kind of programme – we were probably not cognisant of this at first, but have learned subsequently.



Figure 3: Group discussion during a workshop

### **Commitment from the top**

Successfully getting commitment from the top team, to the scale and nature of the roll out. The enthusiasm of the participants. The skills that it has built with internal facilitators. Persevering with very direct and open feedback (with or without video), even with some of our very experienced participants.

*Overall - What has worked well with this approach? What are you most pleased about?*

Dedicating some time at each workshop to consider how that management team would make sure the implementation happened for their part of the organisation was a great idea, particularly for the earlier more senior groups.

### **Getting sign off to the scale of the commitment**

Lots of small things, but probably the most important was being clearer at the outset about the scale of the commitment and getting sign off to this at the start. We are learning a bit as we go, and one year down the line we are finding that the local organisations are taking varying degrees of ownership. Some want to take it to the next level of employee, either through a slightly modified version of the workshop, or through briefing sessions for all employees to enable them to be 'informed' and collaborative coachees. Great news – we probably need to follow up on the

*Is there anything significant that you would do*

*differently?* commitments made by every team. Otherwise where does it leave the other departments – maybe relieved that this year’s initiative is over, and waiting meekly for the next.

### **With thanks to**

All the internal team at the client (who wishes to remain anonymous at this point) and key business partners including Karen Maxwell (KMC Ltd) Thomas Orths (WinLearnChange) and Rowan Jackson (CMI)

### **Reference**

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### **About the author**

Karen Maxwell is a very experienced organisational change & leadership development consultant. The first 15 years of her career were in corporate roles with British Airways, Xerox & Cadbury Schweppes. For the last 10 she has worked as a consultant. Her approach is characterised by creating sustained partnerships with clients, enabling her to facilitate change & build trust through openness and humour.

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# Systemic Modelling:

## Installing Coaching as a Catalyst for Organisational Learning

Nancy Doyle, Paul Tosey and Caitlin Walker



*In this article we introduce the background to our organisational coaching process, Systemic Modelling, outlining where it comes from, how it works as a cornerstone of organisational development work and some practical examples. We present a case study with one corporate client to illustrate how it can be implemented, plus the results of our first evaluation. We use stories, metaphors and examples to track the shift in thinking of a group of senior managers from a silo-mentality, blame or defence culture to networking, collaboration and creativity. We conclude with a reflection on the whole process and the impact team coaching had on organisational learning.*

### Keywords

Coaching, organisational development, Systemic Modelling, metaphor, stories, culture change, organisational learning, clean questions, emergence

### Background

According to Dixon (1994) "The essence of organisational learning is the organisation's ability to use the amazing mental capacity of all its members to create the kind of processes that will improve its own". This definition informs our work with coaching as organisational development.

Our work using coaching with groups began in community and youth work, where resources are tight and individuals don't have significant budgets for one-to-one work or long-term interventions. We believed our clients would achieve maximum sustainable change for the smallest budget if they adopted change processes and

used them with one another to create coaching networks or learning communities.

**One of the most successful coaching techniques ... encouraged individuals in groups to explore ... through client-generated metaphors**

One of the most successful coaching techniques we tried encouraged individuals in groups to explore any idea, behaviour, problem or outcome through client-generated metaphors. This technique, called 'Symbolic Modelling' (Lawley & Tompkins, 2000; Hill, 2004), is based on the premise that client-generated solutions using their own words – and, crucially, using their own metaphors – will be more resonant to the client than expert advice and will enhance their self-efficacy.

The technique is based on asking certain 'Clean' or content-free questions to ensure that the answers are client driven. For example,

*Client : The same problems keep coming up over and over without the push needed to address the cause.*

*Coach: And that's the same problems coming up over and over like what?*

*Client: Like a water wheel without enough water.*

*Coach: And coming up over and over like a water wheel, and without the push needed to address the cause, and what kind of push, is that push?*

*Client: Like we need to hike upstream and see what other water sources we have access to and then relocate the wheel there.*

**Clean questions are particularly useful for keeping assumptions and prejudice to one side and paying attention to what is said**

To make the most of available budgets in our community and youth work, we began to apply Symbolic Modelling to small groups. We discovered that this simple process led to accelerated group learning. Clean questions are particularly useful for keeping assumptions and prejudice to one side and paying attention to what is said. Questions are curious instead of accusing, collaborative rather than competitive. This, in turn, fosters listening skills and a non-judgemental attitude to each contribution and gives everyone access to the diversity and wisdom of group members. Our experience suggested the approach was accessible to everyone, from disaffected teenagers and the long-term unemployed to senior managers in corporate settings. Groups were able to apply clean coaching protocols to new situations and create coaching networks.

We adapted this technique to use in organisations and we call it 'Systemic Modelling'. This reflects our main emphasis on making a difference to the collective, or the system, as distinct from the individual. Working in metaphor is helpful because, in our experience as coaches, we have found that people in organisations often have very limited ways of discussing problems, outcomes and actions, and can become distracted by competing for position, silo-thinking or sly put-downs.

To illustrate how 'Systemic Modelling' works, we present our case study of an international manufacturing company.

## Systemic Modelling with a corporate client – the pitch

*When invited to pitch for the work, we used 'clean questions'*

This organisation had not undertaken management development training, coaching or learning in 15 years and had a modest training budget granted by the chairman of the board. When invited to pitch for the work, we used 'clean questions' ourselves by asking, "What would you like to have happen"? This revealed differing priorities amongst the Training Steering Group (TSG) of 10 senior managers and different opinions about the desired training and its business aims. We used the situation as an opportunity for them to experience our process in the moment, asking them clean questions to create individual models of the problems they perceived in the business and the outcomes they desired. We enabled them to clarify one another's statements before objecting to them; and to voice the assumptions or fears they were holding. As a result the TSG chose us over the other pitches, stating that they had been able to explore potential conflict with an openness and ease that had surprised them.

We began with the following intentions:

1. Instigate practical changes at individual level.
2. Bring individuals together in groups to practice with each other and embed co-coaching as a relational tool.
3. Support the way individuals use new skills and better relationships in the organisation.

### Step 1 – working one-to-one

We began the intervention with brief one-to-one coaching for the TSG to help them think systemically about the business, clarify their goals and elicit metaphors which described the clients' current experiences of their organisation (see Box 1 for our Clean Questions and their responses).

#### Box 1: "Right now, the company is like what"?

*"A series of cogs spinning, some of which are connected to each other, others which are just spinning at really high speeds. They are engines and activities in their own right but aren't connected to other activities which would drive output and successful outcomes on a wider scale. The inability to connect and gain momentum sometimes leads to a feeling of powerlessness and fatigue."*

*"Like an oil tanker charting a river, avoiding hitting the sides, other boats and mud banks. Occasionally it gets stuck and then it's really bad. We put all the effort into avoiding the sides i.e. when there's a service issue, all the effort goes into dealing with that issue, however you could still bump into another boat or something else could go badly wrong. Everyone is rushing around trying to solve the problem but not actually dealing with the issue which is that the river is too small for the boat and it needs to find open water. Unfortunately all the crew are following maps/charts and compasses when really they just need to look out the window and see what's there. We've got it to a critical level, we operate well for a while but we're not very good at operating when something else throws us off course."*

*"Rudderless and heading for an iceberg and keep saying, we'll get so much better, the liner is heading towards the berg and we're going to hit it because no-one believes anything's going to change."*

*individual metaphors hold the structure of the problem as a whole 'story'*

These individual metaphors hold the structure of the problem as a whole 'story'. Listening to each metaphor gives a sense of what's happening for that individual in a succinct and easily understood way. Members of the TSG were able to read one another's metaphors in the training group with curiosity, humour and interest and develop a joint understanding of the current situation.

We then elicited metaphors describing what each individual wanted to have happen (see Box 2).

**Box 2: "If the company were to be evolving in a way that was just right for you, it would be like what"?**

*"A winning crew in a rowing boat of eight, pulling at the same time in the same direction. All going at the same speed, as fast as they can because if you do not, it doesn't quite work, the oars get in the way or the boat goes to one side and doesn't go straight, and it never completes the race as a winner. Sometimes when we don't win the race we need to go back and work out why we didn't win the race, what happened, what didn't happen, and what we're going to do differently to prevent recurrence."*

*"I'd like to work together cohesively and come up with a common direction – to be as one. To be coming up with some new ideas about the business, instead of going the same cycle year after year. They [the board] would be like the captain on the ship, they'd decide on the direction and the crew would do the rest. We're the first officers and we get to decide how to get the ship from A to B on the most efficient route."*

*We looked for patterns repeated in their metaphors*

**Step 2 - Moving attention from individual to whole group**

Next we wanted to 'chunk up' their attention to group-level analysis. We looked for patterns repeated in their metaphors. From what the individual members of the TSG were saying, what would we conclude that they as a group believed? What were the majority of them concerned with? We found that some key themes emerged:

- Lacking direction / leadership
- Inconsistent messages
- Wasting resources

We observed ten cross-departmental meetings during which these themes were confirmed by staff behaviour. We observed that:

- Air time was shared evenly between a number of individuals. There wasn't a clear leader.
- 76% of questions were closed (required yes/no answers).
- Of these, most questions were directed at individuals rather than the whole group, which limited members' ability to learn from each other or collaborate.
- 47% of action items on the agenda were not yet completed, however there were few challenges or enquiries as to why. The most common response was "We'll push that deadline back".

- Despite lack of action, there was a distinct absence of feedback. Seven out of ten meetings had no feedback whatsoever.
- People were rarely thanked for a job well done.
- Meetings did not begin with clarification of meeting purpose or an opportunity quick round for each person to share their expectations.

This showed us that, in keeping with the TSG's metaphors, teams were neither operating effectively as hierarchy nor as a collaboration. There were inconsistent messages about deadlines, a lack of leadership and no clear direction provided.

The key themes in the TSG's desired outcomes were:

- Increased feedback
- Consistent decisions
- Consistent direction
- Unity
- Realising potential
- Fun

*they applied clean questions to create a shared metaphor of what they wanted to happen*

We fed these themes back to members of the TSG who agreed these as the team priorities. Then, building on the previous one-to-one work, they applied clean questions to create a shared metaphor of what they wanted to happen, together with specific action points to enable these outcomes to be achieved. As they used clean questions with one another, they were in effect coaching – facilitating one another's thinking, as well as learning from one another. The quality of the conversations is akin to dialogue (Isaacs, 1993).

Soon, organisational members began reporting that they were behaving differently towards each other outside the training environment and in relation to business needs. This first manifested itself in a round of what we call 'clean feedback', through which people started to give one another information that had previously been consigned to corridor conversations.

We also asked them to start using what we call a 'Clean Set Up' to get together before meetings and coach one another to be clear on their outcomes for the meeting and to share their agendas. The 'Clean Set Up' is a specific set of clean questions designed to elicit outcomes and explore differing expectations.

By the end of this phase their attention was still very much on applying the coaching tools in the way they had been taught.

### Step 3 - Moving from group to organisation

The next step represents a key transition in using coaching as the vehicle for organisational learning. In order for the group's experience to make a difference organisationally we believed we had to:

*We broke down ...  
Systemic Modelling  
into workplace-  
relevant strategies  
which could be  
easily cascaded  
throughout the  
system*

- Get the board's agreement that the coaching processes were acceptable to them in order to support the TSG to apply them in live meetings.
- Train the TSG to facilitate each other in the way we had facilitated them. This enables them to apply the coaching processes to new arenas outside the training room and develop business credibility.
- Provide more members of the organisation with a similar experience to approach the 'tipping point' (Gladwell, 2002) at which enough people are communicating like this for it to become 'the way we do things around here'. This involves training managers to pass on the processes to their teams leading to a cascade.

We asked the TSG to take live business issues and coach one another in threes to develop greater understanding of the outcomes and shared responsibility for achieving goals. Each member of the group took turns at being the focus. We also worked with 60 more managers in the company in group sessions. We broke down some of the tools of Systemic Modelling into workplace-relevant strategies which could be easily cascaded throughout the system, namely asking open questions, eliciting metaphors, setting outcomes and providing feedback. We trained these managers in groups of 15 to 20, each with a TSG member present to achieve 'train the trainer' outcomes.

As with the TSG, we allocated these managers to smaller groups of three-to-five to practice coaching on live issues between training sessions. We asked them to take small real issues such as meetings or presentations and coach one another to create an outcome for the event, including the responsibility they'd take for maintaining their own state and what resources or support they needed. There was no leader in these groups - each individual was given equal time. We were confident at this stage that their senior managers, the TSG, would support their forays into new ways of thinking and communicating, leading to a high level of training transfer.

### Indications of change

Six months after the training we returned to the company and interviewed members of the TSG. We asked them what had worked well, what had not worked well and what changes they had noticed since the training. We also elicited a metaphorical model for their current experience of each other (Box 3).

### Box 3: "Currently, the TSG is like what?"

*"Everyone is aware, the training has woken us up and made us aware that we are working together and everyone is on the same boat."*

*"We were like a string vest, the relationships had holes in them and wouldn't hold water. Now there are fewer gaps and we genuinely try to support each other."*

*"It got us a lot closer, more casual with each other, people don't go off on one, less turf wars."*

*"Silo-mentality has been eroded."*

*"When anyone speaks there's less drama, a lot more conversation - I notice it in meetings they are amazingly calm, we're all together and we know we are."*

*"More of the previously unspeakable issues are coming out in meetings rather than corridors!"*

#### **Data suggest that training groups in coaching skills impacts group behaviour and group relationships**

Results of a survey to managers who attended the later training suggest they were using the following Systemic Modelling techniques:

- Using Clean Set Up at in-house meetings: 77%.
- Using Clean Set Up at client meetings: 56%.
- Using Clean Set Up during interactions with peers: 46%.
- Using Clean Questions in meetings: 49%.
- Using Clean Questions during interactions with peers: 44%.

Both sets of data suggest that training groups in coaching skills impacts group behaviour and group relationships. Through improved communication they are more likely to be able to access each others' expertise in, for example, the cross-departmental meeting where 76% of questions were previously closed. The kinds of dialogue that the implementation of these processes inspires should begin to change the learning culture in the company and impact at the organisational level. The question now is 'How would we know?'

### **What else could indicate that organisational learning has occurred?**

We are especially interested in evidence of emergent (Johnson, 2001) new behaviour, such that the original material we delivered had been modified or applied in a new context. One of our own metaphors for how this works is that of learning to cook. At first we ask them to stick to recipes, measuring accurate amounts and following instructions to the letter. As they learn and become cooks (coaches) they begin to experiment, and can put dishes together that don't follow recipes but do work well in terms of combining flavours. Thus, having trained the groups to use a few, very tight processes we sit back to watch how those begin to affect the flavour and culture of the company. In our experience, we find that this takes time and that the organisational culture has to remain open to the processes introduced during training for this to take place. The processes operate like feedback loops, such as in Senge's (1990) Learning Organisation, instituted as formal routes for information,

#### **From metaphors of**

**being stuck and directionless they have moved to metaphors of change and transformation**

rather than informal learning via 'corridor chat' or 'pre-meeting meetings'.

The changes we expect to see in the company presented in the case study should begin to manifest in their metaphors, which we can collect at a variety of post-training intervals. The following metaphors collected from managers are interesting comparisons with those from the start of the project. From metaphors of being stuck and directionless they have moved to metaphors of change and transformation.

**Box 4: "Currently, the company is like what?"**

*"A chrysalis undergoing change."*

*"A volcano – lots of activity going on inside, active and strong, but still a bit volatile."*

*"A large oil tanker beginning to change direction."*

*"On the brink of some major cultural change for the better."*

*"A wild animal that is slowly being trained."*

**We have evidence of people adapting the Systemic Modelling techniques**

We should also begin to see evidence of change in the behaviour of employees during meetings and with each other. So far we have evidence of people adapting the Systemic Modelling techniques. While many interviewees report finding the formal structures of the techniques difficult to use in every meeting, a quarter of respondents reported in the interviews something similar to the following:

*"We don't always use Clean Set Up. But we do go round the room and ask everyone what they want to get out of the meeting."*

This adaptation suggests that people have understood the principles of the Clean Set Up and that they have begun to cook without the recipe book. They have begun modelling each other's outcomes and have adapted coaching principles into a formal organisational event, thereby improving the effectiveness of meetings. While many are still using the recipes, it is early days and we find it can take up to a year for the work to 'go native'.

We sought practical examples of ways in which these improved relations had helped towards achieving business outcomes. One member of the TSG brought a project team together to coach each other around a long-term business problem which everyone had moaned about but no-one felt responsible for. Instead of waiting for a fellow Director or Board Member to be 'in charge', he realised he could 'pull together' the heads of relevant departments to model solutions together. This was a huge step away from the culture of helplessness, status quo and silo-thinking evident from their initial metaphors. Finally, as one group member said:

**A huge step away from the culture of helplessness, status quo and silo-thinking**

*"The project was like opening up lines of communication that wouldn't be there normally – our whole communication is easier and more beneficial – almost like a balloon, it goes up and the balloon going up just means there's more around it, there's more space in which to have this dialogue, more*



space in which to ask “what would we like?”

We will revisit this company to observe meeting behaviour when there has been time for the behaviour change instituted by those we worked with to filter through to those we didn't work with.

*Organisational members have to be able to do with each other what we have done with them, otherwise we remain the experts*

### **Conclusion: what are the critical elements of a Systemic Modelling project?**

For us, the key difference in working at the individual level and translating that to the organisational level is autonomy; organisational members have to be able to do with each other what we have done with them, otherwise we remain the experts, consulting to their system but never enabling the new behaviours to become part of it. We promote autonomy in three key ways:

- Peer-to-peer coaching practice: we assume that they need to practice using the skills themselves at the 'conscious competence' level before they can unconsciously develop new behaviours.
- Role modelling: throughout the training and coaching we remain exemplars of our own process. We acknowledge our assumptions, ask questions and trust that each contribution made by a participant has value.
- Avoiding taking a position of expert in the system: When we find themes and patterns in behaviour, either individually or with groups, we feed this back in order to encourage debate and ideas for solutions. Nothing is secret, or 'unspeakable'. This encourages openness and expertise within the organisation which are key to the system being able to 'model' itself.

*emergence at the organisational level is possible when you bring individuals together and show them how to apply coaching skills at the group level*

We've tried to demonstrate in this case study that emergence at the organisational level is possible when you bring individuals together and show them how to apply coaching skills at the group level. Systemic Modelling brings specific coaching skills to the company as a whole. Rather than becoming a series of processes, it begins to create new relationships. We believe that it is in these relationships of trust, open debate and feedback that the organisation begins to learn. In that respect, introducing coaching skills into an organisation wasn't just a feature of the organisational learning project, it WAS the organisational learning project.

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Nancy and Caitlin are co-directors of Training Attention Ltd. You can read more case studies which demonstrate the breadth of application for Systemic Modelling on our websites:

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# A High-performing Factory via Solution-focused Coaching: a Case Study

## PaoloTerni



*Coaching deployment and execution in a factory-based lean production OD project.*

*How solution-focused coaching played an important role in helping Sanpellegrino's Cepina bottling factory achieve the status of High-Performing Factory within Nestle' Waters.*

### **Keywords**

Solution-Focused Coaching, HPF, Lean Production, Team Leaders, Development Center, Sanpellegrino.

### **Background**

In 2003, Nestle' Waters launched a world-wide OD program for its factories, called HPF - *High Performance Factory*. It was a well-organized effort that included different activities to improve key performance indicators (KPIs) using a Lean-Production approach.

Sanpellegrino, the well-known Italian bottled-water company, as part of Nestle Waters, operates seven factories in Italy, each with its own brand-name. One of the best known brands is Levissima, bottled high in the Alps near the ski resort of Bormio, in Cepina, Italy.

One of the key tenets of *Lean Production* is for the factory to have a flat hierarchical structure - managerial competences need to be spread "downwards". At Levissima, *Production Teams* needed to be formed and *Team Leaders* needed to be selected and trained.

The factory managers realized that the set of skills required of Team Leaders was different from the set of skills required of their "Machine Conductors" (*Macchinisti*) - their only current intermediate level among workers, a title which was awarded to people with solid technical expertise but very basic people skills.

Therefore they hired a consulting company, *Festo CTE*, to help them select *Team*

Leaders among their workers and then train them. As a consultant who frequently worked for Festo CTE in running *Development Centers* and in coaching managers, I was asked to be Project Leader.

## The Project

### Step 1: The Development Center

**“What ...struck the consultants was the complete absence of women”**

The first step was to run a *Development Center* to select workers who had the best chance to be successful as Team Leaders. A *Development Center* is similar to an *Assessment Center*: participants are asked to simulate certain situations and the consultants observe their actual performances; different kinds of tests are then administered to the participants, together with an in-depth interview. What makes a *Development Center* different from an *Assessment Center* is that in the former the focus is on what the person might be able to achieve in the future if given the opportunity and what his or her strengths are, while in the latter the focus is on evaluating what a person can do right now.

The goal of the *Development Center* was to select a group of 30 people to be trained as Team Leaders, from a total population of about 450 employees (about 250 of them seasonal workers). The factory management made a preliminary screening based on internal criteria, and supplied the consultants with a list of 68 candidates.

What immediately struck the consultants was the complete absence of women on the list, despite the fact that a good 60% of workers there were female. Backed by Sanpellegrino Headquarters, the consultants demanded that some women be included in the list - the objection that it was a “man’s job” was groundless, since it did not involve any more physical effort than that of a regular worker.

I mention this fact to give readers an idea of the cultural backdrop against which change had to take place. We were working in a conservative and socially tightly-knit environment, in an alpine valley, where everybody knew everybody else and furthermore, where things were complicated by the thick web of family relationships among workers.

In the end, we got a revised list of 81 people. The team of 3 consultants ran 9 development centers of 1.5 days each over a period of two months. After elaborating the data and after intensive consultations, the team of consultants presented their findings to Factory Management and to representatives of Sanpellegrino Headquarters HR. Incidentally, our number one pick was a 31-year old woman who was a seasonal worker! Despite the initial shock, we must give credit to Factory Management - they promptly proceeded to hire her full-time and to enroll her in our development program.

Having the same consultants who selected the Team Leaders responsible for their

training and coaching was a bonus for the project - usually consultants who run assessment centers deliver their evaluations and then they move on to other projects. This time around they needed to work with whoever they picked, so whatever karma they got out of their choice was theirs to deal with!

### Step 2: Training

*“coaching was essential to help them survive their new role”*

The main criteria for selecting the group of 30 were the candidates' interpersonal skills. Since the Team Leaders needed to run the team without having a hierarchical role and institutional leverage, it was essential they had basic skills in communication, negotiation, and emotional intelligence to keep the team well-oiled and to influence the team members to perform at their best.

The training was limited to 3 half-day workshops to give participants some basic tools for improving their communication and conflict resolution skills. It was more an orientation to their new role and responsibilities than anything else. We were all agreed that their credibility would be acquired in the field, and coaching was essential to help them survive and thrive in their new role.

### Step 3: Coaching

With Factory Management we agreed to focus our coaching sessions to help the freshly-minted team-leaders handle three crucial steps that signified the depth of the cultural change on the Levissima factory floor.

The 3 crucial steps were:

#### *1) Leading the 5-minute team debrief at the end of the work-shift.*

The goal of the team debrief was to review what happened during the shift and what problems were encountered that might affect the upcoming work-shift. This was a very challenging task: the first obstacle was to actually get the workers to stay there for 5 minutes and not rush to the locker room to get changed and go home. And on top of that the Team Leaders needed to figure out the best way to involve the workers, to ask them relevant questions, and to collect their input.

#### *2) Supporting team members in performing quality control operations.*

Quality checks in the HPF design were pushed down the production line rather than being performed by Quality Assurance personnel. The challenge for the Team Leaders was to train fellow team members to carry out basic sampling operations and fill out QA documents - moreover, it involved changing the attitude of many of the team members, who firmly believed this was not their job, but was a task for the “white coats”.

#### *3) Delivering timely feedback to team members.*

This was a strong signal that their role had changed: they were Team Leaders.

*“the coach did not behave conventionally, taking instead a hands-on approach and sharing the work environment with his coaches”*

So it was their job to tell team members what they did right and what they did wrong.

Organizational changes were also put in place to allow Team Leaders to perform the above steps. For example, they would attend the 30-minute daily production meeting with the Factory Management so they would be aware of the priorities and of the big picture; this allowed them to understand the reasoning behind some requests and therefore equipped them to “sell” the production schedule changes to their teams.

Product Line Managers were involved too - they were invited to increase their presence on the line, to interact frequently with the Team Leaders, so that the Team Leaders’ role was boosted in the eyes of the other team members.

## **How the Coaching went**

### **Coaching structure.**

We held coaching sessions in small groups of three or four Team Leaders – with group composition varying depending on their work schedule. On average, each Team Leader was able to attend 5 of these coaching sessions. Coaching sessions usually included a 60-minute group conversation, a 20 minute walkabout of their lines to take notes about what was going on and an additional 10 minutes of feedback - a total of 90 minutes. The coachees greatly appreciated that the coach was willing to walk the factory floor with them.

The coach also interacted with other workers to establish a climate of trust and shared understanding that we were all learning a new way of working: the coach in supporting his coachees right there in the front lines; Team Leaders were learning how to be leaders; team members were learning to be a thinking part of the production process rather than mere operatives.

In short, the coach did not behave conventionally, taking instead a hands-on approach and sharing the work environment with his coachees. While maintaining total confidentiality, the coach did not need complete privacy - something not encouraged in the manuals, but which in this case worked beautifully.

### **Solution-Focused Coaching: what worked.**

The coaches followed a solution-focused coaching protocol, in keeping with the strength-based approach of the assessment team in the Development Center. In SF coaching the client is deemed to be the expert, so rather than offering advice, the coach asks questions to help coachees access their own experience.

In this case, coachees had a lot of work experience and were very knowledgeable both about the production process and the peculiar alpine culture that permeated the production site. The coach would have struggled to formulate any sound advice

in such a setting.

In SF coaching the focus is on the future and on what coachees want to achieve. This gave coachees freedom to explore how they wanted to be Team Leaders and what kind of Team Leaders they wanted to be.

*“the solution was to  
frame the  
conversation in  
terms and language  
that would matter to  
their peers”*

Last but not least, SF coaching focuses on exceptions to problems, rather than on analyzing problems. This proved a fruitful line of inquiry when Team Leaders were trying to find out how to deal with specific team members who were “difficult”. All Team Leaders had had many interactions over the years with each other and with team members, so it was easy, by following this line of thought, to come up with exceptions and useful strategies.

#### **Coaching results.**

Here is a summary of how the coaching went in regard to the 3 key tasks:

##### *End of shift 5-minute debrief:*

At first, Team Leaders were supplied by thoughtful Factory Management with a pre-formatted flip chart as a tool to facilitate the debrief and as way to organize the information gathered. It seemed to all to be an excellent idea. But as always, excellent ideas need to survive their impact with reality.

While the pre-formatted flip-chart helped to shore up Team Leaders' confidence at first, it rapidly became apparent that this solution was not working: the format was similar to documents the workers were already supposed to fill out, so the whole thing was perceived as a waste of time and just another “stupid ritual”. The actual purpose of the debrief was not so much that of collecting measurable data, something already available through other channels - rather, it was to collect the little tiny signals that escape formal reporting or technical monitoring but that are very important in predicting machine anomalies and breakdowns - small signals that only people who work day in and day out with the same machine could detect. Also, the debrief should have highlighted team interactions, dynamics and organization.

Once it was decided to get rid of the pre-formatted flip-chart and to use a plain white one, things started moving in the right direction. Prompted by the coach's questions, coachees explored different solutions and exchanged practical experiences on how to lead such a debrief - in the end, each Team Leader found his or her own style of involving his or her former peers and getting the job done. For many Team Leaders, the solution was to frame the conversation in terms and language that would matter to their peers - something they knew well how to do. So instead of talking in engineering terms they would talk about the details of routine operations on a specific machine, and the state of that machine. Also, many found out it was very helpful to frame the reason for

*“Sometimes coaching can help, sometimes organizational solutions are required”*

collecting such information as a service to their colleagues taking over in the next shift, just as they had the same kind of courtesy from colleagues preceding them.

For a few of the more assertive and technically-oriented Team Leaders, a barrage of probing questions based on what they observed seemed to work best - and despite the apparent dryness of the debrief, what was appreciated by team members was the attention the Team Leaders demonstrated they had for them and their plight.

#### *Supporting team members in Quality Assurance operations:*

In the planning stage, we thought this might prove the easiest step to achieve, but it turned out to be a tough nut to crack. The main reason was that Team Leaders had problems themselves in getting used to performing those checks - the training from the QA people proved too abstract for the target group. They were able to give very little support to their team mates, some of whom jumped on the issue as a major flaw in the project. Many different solutions were found by Team Leaders during the coaching sessions, but they all involved the support of the QA people, who at this point thought their task was finished and seldom responded to Team Leaders' request of support, thus undermining the Team Leaders' credibility.

After consultations with Factory Management, we took a step back. A QA junior person was assigned the task of training Team Leaders and team members, one team at a time, on the job, for the whole shift. The process took much longer than anticipated at first, then, but in the end it worked. Sometimes coaching can help, sometimes organisational solutions are required. Again, we must give credit to Factory Management for assigning such a high priority to the project to be willing to detach a QA person full-time to get the job done.

#### *Delivering timely feedback to team members:*

Coaching, and more specifically Solution-Focused coaching, was especially effective in helping Team-Leaders deliver feedback. The task seemed intimidating if framed as “delivering feedback” - it had all sorts of negative connotations, with Team Leaders suspecting it would put a barrier between them and their team members, even amounting to a punitive stance towards fellow workers. An SF line of inquiry allowed coachees to come up with a learning rather than a punishing frame (feedback as a learning tool); and moreover, instead of asking them to adhere to a specific feedback protocol, the coaching allowed Team Leaders to find in their own experiences with specific individuals what worked and what did not work. Even more importantly, by using their previous experiences in interacting with colleagues, Team Leaders



established continuity with the past: feedback conversations flowed more naturally. They were no longer perceived as something that marked a divide between them and their teammates but just as a different kind of conversation, building on many other conversations in the past.

#### Overall results:

*“coachees need to experience the problem so they can experience the need for coaching”*

The implementation of the HPF project in the Levissima production site was a complex effort involving many different people in different capacities. Overall it was a success, meeting the KPIs that were set by Nestle Waters Headquarters even though it took 6 months longer than planned.

#### Coaching & OD: lessons learned

Coaching was one piece of a solution in a complex scenario. It met 2 out of 3 OD goals, and it indirectly led to an organizational solution to reach the 3rd goal. Coaching was well received by the coachees for the following reasons:

- A working relationship between the coach and the coachees had already been established during the Development Center; in that setting, coachees experienced first-hand how the focus of the work was their own professional development and nothing more. No hidden agendas.
- Coaching was introduced as a way of helping them once they were already facing problems, i.e. first they were given the new role and thrown into the field, then they were offered the opportunity of having a coach to help them meet the challenges they were facing. I believe this is a key success factor. First, coachees need to experience the problem so they can experience the need for coaching. In this scenario, management does not need to sell coaching - quite the opposite, management can play the role of the saviour by graciously offering them this much-needed support.
- The coaching initiative was presented in a kick-off meeting with all the coachees present. Factory Management explained the purpose of the coaching, and framed the intervention as something to help coachees meet their goals as Team Leaders. The party line was “we do not want to leave you alone”. The coach introduced the concept of coaching, what to expect and the ground-rules
- During the kick-off meeting, Factory Management established a clear unbroken link that connected the 3 areas of coaching with the project’s KPIs. It was re-iterated by the coach that while the goals were given, it was up to each Team Leader how they would reach them. Similarly, progress of the group as a whole would be shared with management, while individual progress and details of coaching conversations would be kept private.
- Team Leaders were instructed to tell team members why the consultant would sometimes visit the lines, and what the coach was doing - a further

message to everyone that everybody was in a learning mode. Simultaneously, it conveyed the message that the OD effort was serious.

- Congruent with the idea that coaching was supportive, coachees were given the chance to opt out of coaching at any time. Nobody did. The same option was given to workers originally selected in the Development Center to become Team Leaders, and some of them did. So the coach was working with a population that had volunteered for the new role and volunteered to have a coach. That helped.

### About the author

Paolo Terni, B.A., M.Sc., is a ICF-certified PCC executive & life coach and a member of Solutionsurfers' Brief-Coach Training faculty. He has extensive experience in training managers and executives in leadership, self-governance & interpersonal skills within the framework of OD projects. Currently based in California, Paolo Terni is committed to making change easier for organizations, teams and individuals.

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# Solution Focused Organisation Development:

## A Swiss case study

### Dominik Godat



*The solution-focused approach contributed a great deal to the organisational development of a Swiss company. Techniques such as 'solution talk', awareness of resources, abilities and possible next steps - as well as finding out what works - helped the company to move from a problem-oriented, stuck situation in October 2009 to a dynamic organisation with a culture of appreciation by July 2010.*

*This case study is about a Swiss company with around 200 employees that merged with another in 2009. When I first met the CEO in October 2009, he explained they were in the middle of this merger and facing numerous problems. Together, these problems had led to a near standstill and the employees were under constant pressure. They had*

*worked with different organisational developers in the past, but were not satisfied, because their expert models didn't fit the company's needs. The CEO invited me to help him solve these problems.*

#### Keywords

Solution Focused Organisational Development, solution talk, appreciation, focus on what works, change.

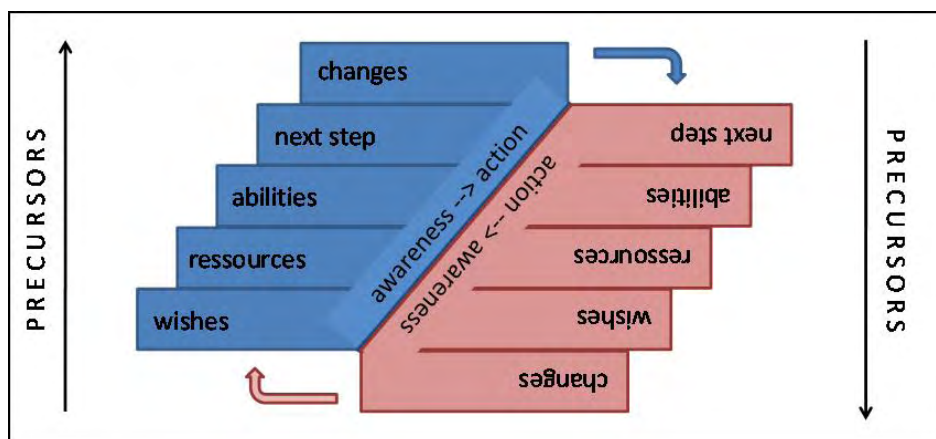
#### Framework and assumptions of Solution Focused OD

Goethe said, "Our wishes are premonitions of the abilities which lie in us, vanguards of that which we are able to accomplish." We might add that our wishes are not only premonitions of our resources and abilities, but that our abilities are also precursors of the possible next steps and future changes that we are able to accomplish. To influence progress, it therefore, makes sense to become aware of your

- wishes
- resources
- abilities and
- possible next steps.

This gives you a firm, confident base from which to decide your next step and act in the direction of your desired changes.

Figure 1: Godat Model of Development



But development can take place not only from awareness to action but also the other way around. This proves valuable in settings when people generally act first. Their actions serve as signs of their existing abilities, resources and also their wishes to change the situation. If they become aware of these elements they can better influence future change. This solution-focused model, based on the work of Insoo Kim Berg, Steve de Shazer and others, applied equally to individual and organisational change.

Solution Focused Organisational Development makes the following (testable) assumptions:

**Solution talk creates solutions;**  
**problem talk creates problems**

- Solution talk creates solutions; problem talk creates problems.
- It is useful to find out and appreciate what works and do more of it.
- The organisation knows everything it needs to find suitable solutions.
- The people in the organisation can be experts for that organisation's development.
- Organisations are complex systems that can be influenced but not steered.
- Small changes by members of the system can lead to immense development of the organisation.

Given organisational complexity, it makes more sense to work on a level of going from one step to another (in a desired direction) than to use a traditional detailed long-range plan.

### **Interventions: solution talk, appreciation and focus on what works**

#### **1. Solution talk with the CEO**

My first intervention, as always, was to sit with the CEO to find out what exactly he wanted and let him do 'solution talk'. 'Solution talk' trades on the idea that change follows attention. The more you focus your attention on problems, the more you tend to consolidate them: As Steve de Shazer used to say: "Problem talk creates

problems, solution talk creates solutions.” So, if you want your client to become a solution expert, you ask questions about his or her desired future, resources and abilities, possible next steps, and encourage this talk in preference to talk about problems.

My client was used to talking about and analysing problems. Therefore, we spent time ‘platform-building’, a process of transition from talking about what was wrong to finding out what positive things he wanted. Gradually he became a solution expert, reaching more clarity about what he wanted. He was finally able to create the following desired future - (Step: awareness → action: wishes):

*“I am aware that we will always face challenges and have problems to solve. But I want a dynamic organisation where the employees take responsibility for these challenges and are enthusiastic about their work. And we need to move on quickly with all activities concerning our merger.”*

He also knew exactly how he would notice that his company had moved to a “dynamic organisation” and what “employees take responsibility (...) and are enthusiastic” would look like.

After asking him about existing resources (Step awareness → action: resources) and his abilities and those of his employees (Step awareness → action: abilities), he realised that his executive board was the key to success. Therefore we planned a 2-day-workshop (Step awareness → action: next step) with them to:

*“Support the teambuilding of the executive board, because half of the board is from our company and half from the other, and define the next steps of the merger.”*



## 2. 99% is working - workshop with the executive board

The focus of this 2-day-workshop was the resources and abilities of the executive board, appreciating the good work they had been doing and all the things that were working perfectly well (Steps action → awareness: abilities, resources, wishes, changes).

The main finding for them was astounding: Even in problem times 99% is still working. The core processes of the two companies were running perfectly well and every day the 200 employees served hundreds of customers. In addition, appreciating and thanking each other for the good work everybody had been doing brought them closer together as a team.

Workshop flipchart

Since they also defined the main next steps and responsibilities of the merger (Step

awareness → action: next step), we decided to meet again with the executive board in a month.

To my delight, this proved unnecessary. The CEO called me after three weeks and said:

*“Is it possible to cancel this workshop? I think we don’t need it anymore because the merger activities are all on track – I can’t believe it, but it’s true(!) – And the executive board is taking the responsibility I was wishing for. I now would like to focus on the mission statements of the new company to create a new corporate culture.”*

***This led to self-organised new assignments of tasks and increased cooperation***

The CEO had gained confidence in his executive board, in the defined next steps and the assigned responsibilities. He next allowed the executive board greater autonomy and the merger tasks were processed more quickly. Furthermore, the members of the executive board talked a lot more with each other and got to know each other better. This led to self-organised new assignments of tasks and increased cooperation.

### **3. Solution talk with the CEO**

After about one hour of reflecting on the following miracle question (Step awareness → action: wishes):

*“Imagine that tonight while you are asleep a miracle happens that takes you into your preferred future. But because you were asleep you don’t know anything about this, how will you find out the next day that it happened?”*

The CEO came up with the idea of short (1 ½-hour) core-value-workshops with all departments (Step awareness → action: next step).

### **4. Focus on what works: Core-value-workshops with all employees**

Given that the appreciative workshop with the executive board had worked well, we decided to do something similar with all employees and let them work on four questions in small groups:

- What are we (as employees, as team, as department) doing really well?
- What values are we living in our everyday practice that we are proud of?
- What do our customers praise?
- What abilities and resources do we have?

(Steps action → awareness: abilities and resources).

*What are we ...  
doing really well?*

*What values are we  
living ... that we are  
proud of?*

*What do our  
customers praise?*

*What abilities and  
resources do we  
have?*



Workshop participants answering these questions

The CEO and I facilitated these workshops in groups of about 20 people over 1½-months. During these workshops I realized how the CEO became more and more appreciative. Whenever a group didn't know what to be proud of or what they were doing well, he mentioned all the positive aspects that he had observed before. This was usually the starting point of a lot more positive aspects. More than that, the employees were delighted to hear that the CEO really appreciated their work.

The feedback shortly after these workshops, after one week and after one month, surprised us all. Employees, managers, the executive board, and the CEO discovered a new shared culture of appreciation and cooperativeness. Employees with different functions started to get to know each other and to work together more closely.

Furthermore, since the lived core values were almost the same in each department, it was easy to use them to create common mission statements and corporate values that really fitted the company.

### **Key OD learnings of the company**

Although there were formal changes (written core values, new organisation (chart), special programs of appreciation, etc.), the main developments, in my view, happened informally and can be most readily identified when talking to the people and comparing their everyday practices.

- **Appreciation leads to a better work environment and motivation:**  
Employee: "I now know that my work is appreciated, and that motivates

me.” Team leader: “I saw the effects of appreciation on my employees and I will focus more on what works”. CEO: “I realized how I became more appreciative and saw the effects of it.”

- **Getting to know each other leads to better outcomes:** Project Manager: “I am amazed. Our project is dynamically making progress because we now know each other much better.” CEO: “They have got to know each other better.” Employee: “We now work together a lot better since we got to know each other. I can even understand that they sometimes have different views and opinions.”
- **Similar core values lead to better cooperation:** Employees: “We were amazed to see how similar the core values are. We now have a base to communicate and work together because we believe in the same things.”

### My key learnings

- **Solution talk creates suitable solutions:** It was good to keep asking the client about wishes, resources, abilities, next steps. This enabled suitable solutions and demanded a lot of ‘not knowing’ on my part.
- **Small interventions can lead to immense change:** If you asked the employees what the most important intervention was, they would all say the appreciation from the CEO that showed them that he cares and that they are important. This small intervention led to a massive culture change.
- **Find out what works and do more of it:** One of the most significant findings for the executive board and the CEO was that - despite all the problems - 99% was working well. They now had the chance to decide on what they wanted to focus on – on the 99% or on the 1%. Furthermore they could use the 99% to build on and do more of.
- **Go from one step to another:** In the beginning we could have been tempted to make an action plan, but due to the complex and dynamic situation this plan would have been irrelevant after a very short period of time. Therefore, we decided to take one step after another and define next steps along the way. I am glad we did this because no one would have been able to predict such a great success with only four steps.

*solution-focused  
coaching and  
Solution Focused  
Organisational  
Development go  
together*

In this case and my everyday practice I often realize that solution-focused coaching and Solution Focused Organisational Development go together, add to each other and can't really be disconnected.



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## About the author

**Dominik Godat** is a solution-focused coach, organisational developer and facilitator. He runs Godat Coaching ([coaching@godat.ch](mailto:coaching@godat.ch), [www.godat.ch](http://www.godat.ch), a member of STELLWERK [Entwicklungsmanagement www.stellwerk.ch](http://www.stellwerk.ch)) working mainly in Switzerland and Western Europe with profit and non-profit organizations.

Dominik also trains and coaches individuals, managers and teams who are looking for success in business and in their private lives. He invented Random Coaching in 2006 and has influenced many solution-focused coaches since. He contributes to books, including Solution Tools, Solution-Focused Management, and 57 SF Activities for Facilitators and Consultants. He is member of the international steering group of the SOLWorld community ([www.solworld.org](http://www.solworld.org)) and works closely with coaching pioneers, including Peter Szabo. He also holds workshops at international conferences and lectures at several universities in Switzerland.

He lives with his girlfriend near Lucerne and loves to be outside enjoying Lake Lucerne and the mountains.

# Creating a coaching culture one conversation at a time:

## Solutions-focused coaching at John Laing Integrated Services

Janine Waldman



*How can an organisation create a coaching culture one conversation at a time? This article looks at how John Laing Integrated Services (JLIS) used the solutions-focused approach to raise management performance and support the business through a time of significant growth. It describes how a solutions-focused coaching programme was cascaded through the organisation and became embedded in the business, leading to long-term, sustainable change.*

### Keywords

Solutions focus, change management, culture change, coaching, organisational development, constructive conversations

### Introduction

Imagine an organisation where managers take every opportunity to praise what's going well and to recognise and appreciate the contributions that individuals make. Where conversations are about what's wanted, rather than what went wrong. Where people talk about their ideal future, rather than the disappointing past. Where meetings start with the question 'what's working' as opposed to 'what's the problem?' What would an organisation need to do to make this happen, and what impact would it have on the performance of individual team members, teams and the business as whole?

*how one organisation ... gradually changed the culture of the business, one conversation at a time*

This article looks at how one organisation – John Laing Integrated Services – took on this challenge and gradually changed the culture of the business, one conversation at a time, through a solutions-focused coaching programme. In the three years since the initiative was launched, 32 managers have completed the programme, over 60 people have received coaching from internal coaches and solutions-focused coaching conversations are now part of day-to-day communications within the organisation.

The business has seen significant benefits, including a shift from negativity and a focus on what is not working to a focus on strengths, successes and what is wanted. Meetings have become more productive, key strategic projects that were

floundering have got off the ground successfully, and the organisation estimates it has saved thousands of pounds through development of more efficient working practices.

## The Business Issue

John Laing Integrated Services (JLIS) is a support services and facilities management company providing project management and front-line services for public and private sector clients in education, rail, the police, housing, local authorities, health and waste.

Now employing more than 870 people, the company was established in 2000 to support parent company John Laing plc in the private and public partnership market. It has experienced rapid growth in recent years with turnover increasing 400 per cent in the four years up to 2008. This was accompanied by a rise in staff numbers and significant expansion of the management team. The business continued to grow, despite the economic climate, doubling both its size and turnover. By 2011, the organisation expects to be employing over 1,000 people.

JLIS operates in a tough market with demanding clients, tight timescales and challenging performance measures. Tim Grier, Managing Director, recognised that as the business was growing, managers' jobs were getting more complex and diverse and they needed more support to help them achieve targets and deliver what clients wanted.

There was already a strong emphasis on management development and continuous improvement within the business. Grier wanted a development approach which would raise the bar and have a profound, long-lasting impact on how the company did business. He began to look for a development intervention that would help the management team step away from the day-to-day operational issues and take a more consistent and strategic approach to their role. In particular, he wanted to equip managers with tools and skills to delegate effectively, pro-actively develop their teams and make better quality decisions.

*“John Laing has been expanding and as a result so have we,” said Grier. “We’re winning new business and contracts, often long-term partnerships of 15, 20 25 years duration. We’ve got an expanding team and the directors and the wider management team have got more and more to do. We had to find a way to raise capability and performance within the business – and we wanted to ensure that the approach we chose would be sustainable and would support our plans for continued growth.”*

The JLIS senior management team were already converts to the idea of using coaching as a development tool. One of the directors had already come across the solutions-focused approach to coaching and felt it would help engender a more

**jobs were getting more complex and diverse and they needed more support to help them achieve targets and deliver what clients wanted**

**we wanted to ensure that the approach we chose would be sustainable and would support our plans for continued growth**

positive, co-operative and collaborative culture within the business.

JLIS invited the team from coaching and change consultancy *The Solutions Focus* to help develop, evolve and embed a coaching programme to help senior managers shift their focus from 'what went wrong' to 'what's going right' and 'how can we do more of it'.

## The Solutions Focus Approach

While some conventional styles of coaching involve an analysis of 'the problem', the solutions focus approach sidesteps the cause of the trouble and heads straight for the solution. The idea is to help the client envisage his desired future and move swiftly towards it, by identifying what's already working well and using this to achieve more of what's wanted.

The solutions-focused philosophy has its roots in 1970s family therapy in the United States, when leading-edge therapists (*Insoo Kim Berg and Steve de Shazer*) realised that you don't have to analyse peoples' problems to help them improve their lives. Using this fundamental insight, the therapists asked individuals to describe their preferred future and helped them to take steps towards it.

*The approach is particularly powerful when applied to the day-to-day conversations that take place between people in organisations*

This solutions-focused methodology is now a widely recognised approach that is being used in organisations worldwide to help manage change, resolve conflict, develop leaders and managers and transform corporate culture. The approach is particularly powerful when applied to the day-to-day conversations that take place between people in organisations. *"Conversation is the fundamental unit of change. If you change the conversation, then there's every chance you'll change everything that surrounds it,"* says Paul Z Jackson, co-author (with the writer of this article) of the recent book 'Positively Speaking'. *"Culture change within an organisation really can start just by simply changing the nature of the conversations that people have."*

## Constructive Conversations

Jackson suggests that to understand this concept, we only have to reflect on our own recent conversations. Some will have been energising, informative, enjoyable and helped us make progress, while others were no doubt difficult, draining and full of misunderstandings.

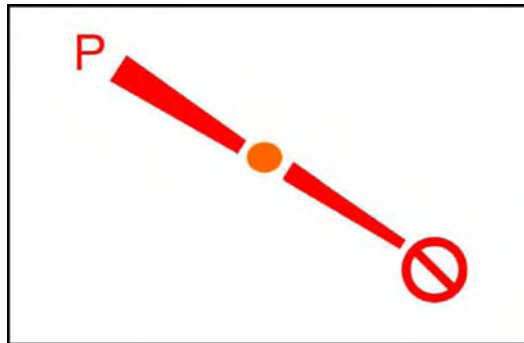
*A constructive conversation is any conversation in which the participants make progress*

The solutions focus approach to coaching gives people the tools and techniques they need to have more constructive conversations, more of the time. A constructive conversation is any conversation in which the participants make progress. Maybe a relationship with a colleague improves, a member of the team is clearer about exactly what they are required to do or people feel more motivated and ready to take on the next challenge.


The following models illustrate how this strategic approach can be applied to the

whole range of activities that take place in a work setting.

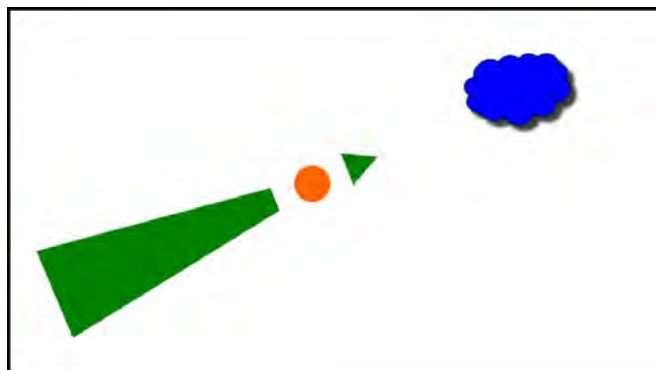
#### A Problem-focused Model



In the problem-focused model:

- Time is represented along the horizontal axis from past to future.
- The dot in the middle stands for the current situation.
- The P on the left is a problem – arising in the past.
- The  represents the 'dreaded future' - what will happen if we keep going in this direction.
- The red lines connecting these points represent respectively an analysis of how we got from the original problem to where we are now and an extrapolation or prediction of what will happen to take us from the current position to the dreaded future.
- We call this the Problem axis.

#### The Solutions-Focus Model: find what works and do more of it



The solutions strategy model explores a diagonally contrasting axis, which runs through the same current position. On this axis, the fluffy cloud on the right is the Future Perfect – a preferred state in which current problems have vanished.

When we look back to the past to discover what it is that has been happening in our organisation, we look at those aspects that are already taking us in the direction we want to go. This rich combination of skills, resources and examples provides the

fuel, the encouragement, the motivation and sense of possibility to choose what small step to take next – a step in the direction of the Future Perfect.

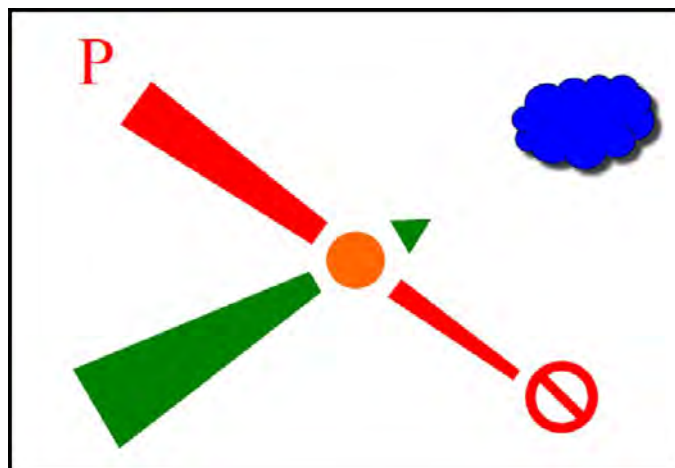
Traditionally, we assume that learning about the problem will help with working towards a solution. But here we can see that the problem axis and solution axis are different and independent. Finding out about the problem makes us experts on the problem – which is usually better overlooked. Once we do more of what we already know works, we can notice its impact and chose to do more of it if it proves useful.

**Once we do more of what we already know works, we can notice its impact and chose to do more of it if it proves useful**

The art of the constructive conversation is to engage people along the solutions axis. Sometimes they will join you there readily and easily; sometimes you can use one of a range of solutions focus 'tools' to help them switch at some point from problem axis to solutions axis.

Often the most significant moment in a constructive conversation is the point at which people shift from problem to solution, as shown in the diagram below.

### From dispiriting to energising conversations



The Solutions Focus Model was developed by Jackson and McKergow

Tim Grier particularly liked the idea of this approach for JLIS because of its potential to help people move away from a pre-occupation about what might be 'holding them back' towards an understanding of how they could move forward and achieve the desired results.

*"It takes away the bullshit and waffle and cuts to the chase, while still recognising success at the same time," he says. "It helps us understand where we are and gives us the opportunity to reflect on our achievements and attainments."*

### Developing the Programme

The team from *The Solutions Focus* worked alongside the JLIS board to design a coaching programme which would start with the senior management team and be cascaded down through the organisation.

**The team from The Solutions Focus**

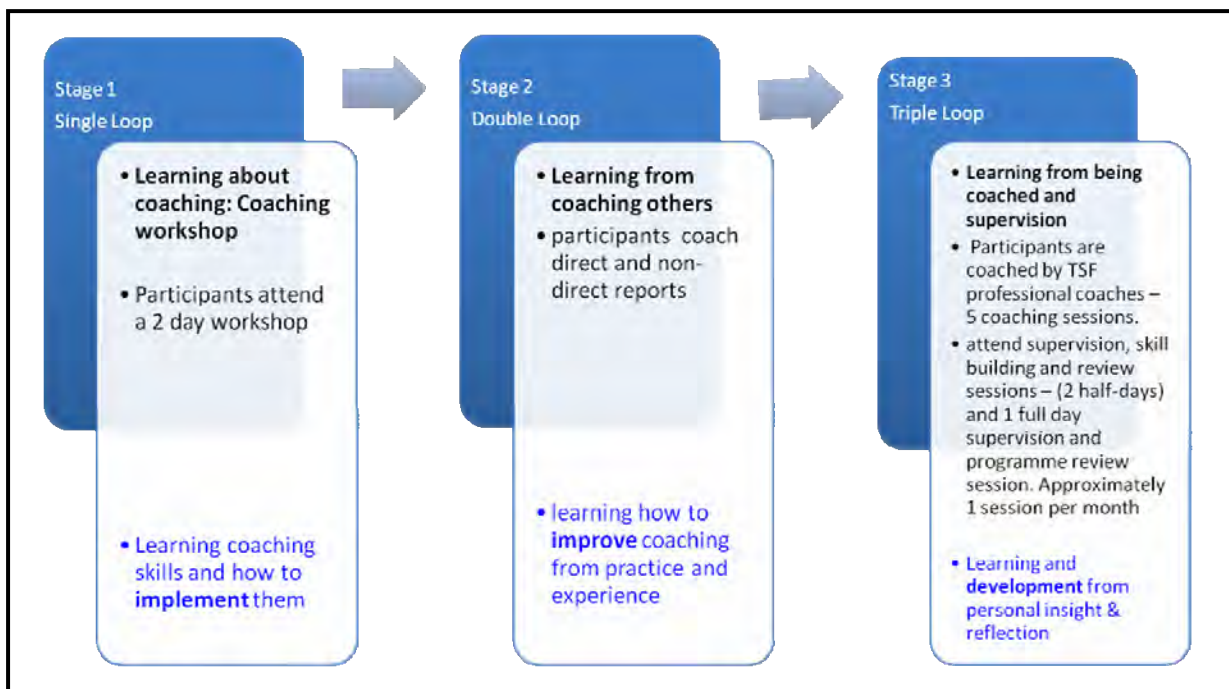
The aim was that over time the solutions-focused coaching approach would

*worked alongside the JLIS board* become embedded into the culture of the organisation and become ‘the way we do things around here’. Grier wanted to see managers using solutions-focused coaching skills on a regular basis, as part of their day-to-day work. He envisaged that a common language would emerge, that managers would start to use the approach with clients and stakeholders as well as with employees, and that the coaching process would become intrinsically linked with career development within the organisation. A key objective was that the business should ultimately ‘own’ the programme, with those who took part in the development eventually going on to become internal coaches themselves.

*A key objective was that the business should ultimately ‘own’ the programme* The management committed themselves to adopt the programme, with everyone taking the approach of ‘how can we make this work’ rather than ‘will it work?’ We asked the senior team, for example, to envisage what the organisation would look like in the future, when solutions-focused coaching had become truly embedded. We encouraged them to think about what was already happening internally that might contribute towards this aim and to identify the small but significant steps they could take to help move the project forward.

## Programme Design

The Solutions Focus incorporated the principles of Triple Loop Learning into the design of the programme. Triple Loop Learning involves ‘learning how to learn’ by reflecting on the process of learning. The diagram below shows how this worked in practice in JLIS.



Model adapted from the original developed by Shaun Lincoln, Centre for Excellence in Leadership (2004), Based on the learning loop work of Argyris and Schon (1978)

This design reinforces long-term sustainable change as participants are in effect

**This design reinforces long-term sustainable change as participants are in effect learning about learning**

learning about learning. They are learning about coaching, putting their skills immediately into action and reflecting on this through receiving coaching and supervision.

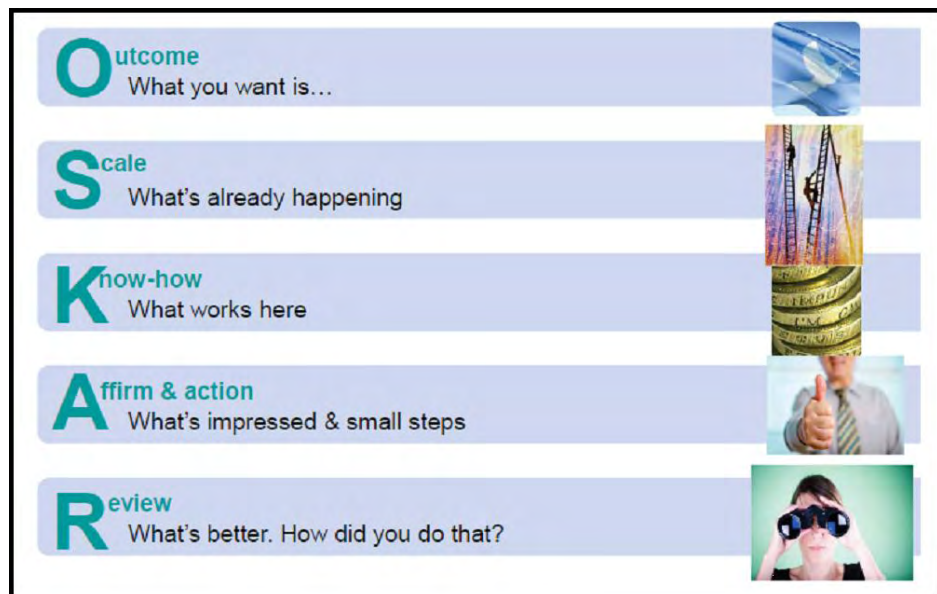
### Getting Started

We kicked off the programme with a two-day workshop where a group of eight directors learnt how to use solutions-focused coaching to help improve performance in their teams. We equipped them with tools and techniques to apply to all aspects of their work, from one-to-one coaching conversations with direct reports to strategic planning of projects. One key tool was OSKAR - a framework developed by Jackson and McKergow (2008) which provides a series of steps for structuring a coaching conversation and finding a way forward.

**OSKAR is an acronym for Outcome, Scaling, Know-How, Affirm, Action and Review**

OSKAR is an acronym for *Outcome, Scaling, Know-How, Affirm, Action and Review*. It helps people establish a starting point for a constructive conversation, notice the good things that are already happening and plan the small steps that will help them move forward.

#### The OSKAR Route



Over the six months following the initial workshops, the directors each had six one-to-one sessions with a professional coach and gained practical experience by coaching two people from outside their teams. We held extra skill building and supervision sessions to help them develop their skills further, review progress, share their experiences and discuss issues as they arose. Attendance on the programme was high despite busy schedules, with directors making sure they made time available to be coached and to coach others.

**Attendance on the programme was high despite busy schedules**

### Rolling out the programme

This first programme was run as a pilot and adapted and improved as it went along. This approach reflected the *triple learning loop* principle that had been applied to



the original design, enabling the organisation to *learn about learning* as it went along.

#### SF coaching conversations between programme participants



***We designed and managed the programme in a solutions-focused way, which added to its emergent nature***

We designed and managed the programme in a solutions-focused way, which added to its emergent nature: the organisation was able to navigate change by identifying opportunities and responding to them as they arose. In other words, it was able to identify what was working, evolve its 'future perfect' over time and take small steps toward achieving it.

Phase one was extremely well received, with participants reporting they were seeing immediate results from their application of solutions-focused coaching.

*"When you apply this approach it means that there is no negativity and everything is regarded in a positive light – which really changes people's behaviour,"* explains HR Director Justine Brown.

#### Learning OSKAR the experiential way



*"From a personal perspective, I am learning to delegate and coach my staff, rather than taking things from them and doing it myself. If staff speak to me about an issue then I will use the techniques I have learnt in the coaching course to help them see how they can progress the issue."* ‘

JLIS asked the directors who participated in the initial programme to identify people from the broader management team who they felt would be pivotal in taking the business forward – and we included this second group of 12 managers in the next phase. The programme really started to make an impact during this second phase, when solutions-focused conversations started happening in all corners of the

business. Participants reported feeling more confident in their management abilities and said they were finding it much easier to concentrate on the strategic aspects of their role and communicate clearly with their teams.

*“My confidence and self belief are much higher – and using this approach has helped to keep my workload down as I’m not taking everything on myself,” says Jackie Oliver, Commercial Manager and JLIS internal coach.*

For Business Systems Manager Alan Batt, one of the main advantages of the approach is that it creates change on a gradual, incremental basis and ensures projects don’t lose momentum.

**... it creates change on a gradual, incremental basis and ensures projects don’t lose momentum.**

*“My favourite bit is working towards the outcome in smaller steps, rather than attempting to take huge steps. It’s a lot less stressful and keeps things achievable and moving forward,” he explains. “It’s something that can be used day-to-day as part of the normal management process. It stops us getting bogged down in the issues and the background noise of who said what to whom, and why it’s not working. We are spending more time looking at what people do well and learning from it and we are able to look at the demands on us and find solutions.”*

Sandra Bruce-Gordon, General Manager of one of JLIS’s local authority projects, says this step-by-step approach has also had a major effect on motivation within her team. People are able to celebrate small successes on a regular basis, which helps to maintain energy and enthusiasm.

*“Instead of waiting a year to blow out the birthday candles you can have several slices of celebratory cake on the way to the milestone,” she says. Sandra believes the solutions-focused approach has also helped to bind people together. “We are all talking the same language. I don’t think that we necessarily use the phrases we learnt within the programme or consciously imagine our ‘future perfect’ every day, but the programme has delivered a common way of working and addressing the issues and has I am sure gone some way to aiding an understanding of one another.”*

## **Developing Internal Coaches**

There was a significant shift during the third phase of the programme, which involved introducing a further twelve managers to solutions-focused coaching. This time, internal JLIS coaches conducted the one-to-one coaching, rather than professional coaches from The Solutions Focus (TSF). Managers who had previously taken part in the programme coached, giving the business increasing ownership. A professional coach from TSF supervised and supported, with the aim of them eventually become self-sufficient internal ‘experts’ who could themselves support and develop others.

JLIS plans to start the fourth phase of the programme next year. This will involve

continuing to develop internal coaching capability and gradually rolling the programme out to all 50 managers in the broader management team. Building on the coaching programme, the organisation has also recently launched a solutions-focused 360-degree feedback programme to support the development of the management team.

### Measuring the Impact

**MD Tim Grier says  
... change has  
happened on a  
number of levels**

There is no doubt that the solutions-focused coaching programme has had a significant and long-lasting impact within JLIS. MD Tim Grier says this change has happened on a number of levels. Firstly, there has been a sizeable and noticeable change to the overall atmosphere within the business.

*"The facilities management business is tough and it's easy to focus on what's going wrong, but just because we don't get a pat on the back from the client, we can still notice what we are doing well and celebrate the successes," he says. "It has been challenging, as giving compliments was not our natural way of doing things - and it has taken some getting used to for people to talk about their own successes openly and to compliment others. The coaching programme has, however, helped us evolve away from an obsession with what's gone wrong - and it is good to have a reminder that actually, the vast majority of things do go well."*

Grier adds that the coaching programme has also made a significant contribution to the growth of individuals and to the management team." *People,*" he says, *"are practising the techniques in their day-to-day work, whether they are in a coaching situation or not."* The solutions-focused coaching programme is, quite literally, enabling the organisation to change its culture in an emergent fashion, one conversation at a time.

*"People are more focused and we've seen greater co-operation because the people who have been coached by our directors and senior managers now have better capabilities and a better understanding of what we're trying to achieve," he explains. "Now, when we have a management meeting, we start off by talking about successes and achievements rather than what we haven't done well. This positive approach is much more motivating and encouraging."*

**significant savings  
through more  
productive working  
practices**

Although the company has not formally evaluated direct, bottom-line benefits, it estimates it has made significant savings through more productive working practices – and as a result is committed to continued investment in the programme.

*"The programme has made a major contribution to JLIS's overall aim of having excellent people delivering things in a consistent way," says Grier. "The coaching is part of an evolution of our culture, based on improvement, development and success and it has played a key role in our successful and*

*continued growth.”*

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### About the author

**Janine Waldman, MSc FCIPD**, has 18 years' experience in coaching, training, consultancy and organisational development, having held senior HR positions in the UK and New Zealand before becoming co-director of coaching and change consultancy The Solutions Focus. She works with organisations to bring about positive change and to implement constructive and resourceful ways of working. Recent projects include developing a coaching culture at John Laing Integrated Services, up-skilling Fairness at Work Advisors at Northamptonshire Police and a two-year project with Reading Borough Council introducing solutions-focused working. Janine is co-author of "Positively Speaking: The Art of Constructive Conversations with a Solutions Focus"

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# Common sense-making:

## The value of coaching and teambuilding to support sustained organisational change

### Vicky Cosstick



*Traditional change management approaches often neglect the personal, relational and shadow sides of organisational change. This article tells the story of what the author learned from leading a programme to train managers to be coaches. She then applied that learning to two further interventions in UK charities. She concludes that there are many benefits for individuals and the organisation when CEOs, senior and middle managers are offered one-to-one coaching support as well as teambuilding during challenging change processes.*

#### Keywords

Coaching, teambuilding, organisational change, management development, management styles.

How can organisations ensure that change initiatives are successful? My experience as a consultant facilitating change in organisations by using a combination of team-building and coaching offers a way of working which I would like to suggest can be used more widely.

The story begins with a large international development charity in North London. I and two colleagues were asked to lead a management development pilot which aimed to train managers to be coaches, and therefore to manage with a coaching style, through being coached themselves. The idea was quite simple: Three coach-facilitators worked with four managers each. During the six-month programme there were three training days – beginning, middle and end; managers received three, monthly, coaching sessions between days one and two; between days two and three they practiced skills in their supervision of their staff, and were in turn coached, again three times, around how they had applied the skills learned during the first three months.

I do not want to spend too long analysing this early experiment – except to note some of the things I learned:

- **Firstly** and most importantly we saw that the major flaw in understanding managers as coaches concerns the confidentiality of the coaching relationship. Coaching (except in rare cases where there are performance issues and HR have a vested interest) is almost always contracted on the

basis of client confidentiality. The value of external coaching lies to a large degree in the space it affords the coachee to offload issues and work challenges and explore them in a safe space. But there is no such space in the supervisory relationship between a manager and her staff. Management supervision is primarily about accountability to individual, team and organisational objectives.

- **Secondly**, it is at the same time true that managers can manage better if they incorporate a “coaching style” – for example, when they listen better, help staff to explore options and generate their own strategies and, are flexible to the different needs and levels of competence of their staff. Some managers do, of course, naturally employ a coaching style anyway.
- **Thirdly**, it was clear that this initial programme was not itself nearly flexible enough. As a “training programme” it was not responsive enough either to what was happening in the wider organisation or to the varied situations and motivations of the managers themselves. The formula of “three training sessions, timed in advance to span six months, with two times three coaching sessions with managers who were each expected to coach three staff themselves” was far too rigid.

One very successful element of this programme, particularly with the most competent and “switched on” managers, was the value and quality of their own reflections during the coaching on the difference that being coached was making to them, the precise processes by which this was happening, and the effect this was having on their management style. Ironically, this was effectively an unintended by-product of the programme and not sufficiently built-in to the “training programme” itself.

*I combined the idea of coaching with teambuilding with the aim of generating long-term benefits both for the organisation and the managers themselves*

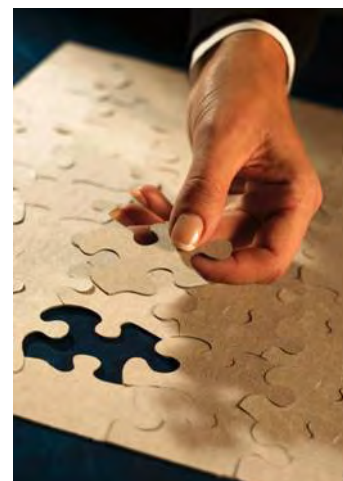
Following this early experiment, I was able to apply my learning in two more organisations, both UK charities (one a disability charity and the other a homelessness shelter). The assignments had some similarities and differences – but in both I combined the idea of coaching with teambuilding with the aim of generating long-term benefits both for the organisation and the managers themselves.

The common features of these change processes were:

- An ambitious change programme involving major and necessary rebuilding of hostel and other facilities – e.g. skills training, fundraising, community development – and restructurings of service provision to the clients.
- Clearly articulated new visions or directions for the organisation, spearheaded at board level and originally inspired by changes in the external environment of the organisation.
- Visionary new CEOs who have the courage to drive through ambitious change programmes combined with an openness, flexibility and readiness

to adapt to changing circumstances.

- Change processes where the strategic and business planning takes place elsewhere. The aim of the development processes I am describing is not to replace, but to support and underpin these more traditional “change management” tools and processes.
- Restructurings of the management team in both cases was “emergent” and followed organically from the change process rather than being a key element at the beginning.



In other respects, the processes naturally differed – because each was tailored specifically to the circumstances in each organisation.

In the charity we shall call “Youth Home” which works with young people and adults experiencing homelessness and vulnerability in London, the process spanned a year and involved a series of three management development workshops combined with the offer of coaching for all managers and some other key staff in the organisation. A third consultant selected by myself coached the CEO. However, the timing of the workshops was not set in advance. The workshops brought together the senior and middle managers from across the organisation, together with the other key staff.

The content of the sessions was geared to understanding managers’ experience of the change process; the coaching was situated to support their own development within the changing context. The overall aims of the assignment were to build relationships across “silos” in the organisation, to give adequate support to managers during the change process, to “embed” the change process and ensure that it went on adapting to realities inside and outside the centre, and to allow managers to identify and work on their own learning and development goals.

This process had important similar characteristics to another process I am facilitating with a large disability charity in a Midlands town, which we can call “Access for All”. In that process there has also been a series of workshops for senior and middle managers and some other key staff, which are ongoing and take place every three or four months. I have been coaching the CEO in between the workshops and coaching has been considered as an option for other managers although there has not been wide acceptance of the idea.

Both of these consultancies have confirmed my conclusion that there are great riches in a process that combines confidential one-to-one support for managers with facilitated group workshop days.

*there are great riches in a process that combines confidential one-to-one support for managers with facilitated group workshop days”*

The coaching has offered:

- The chance for managers to work on their own management style and professional development goals.
- A confidential space in which managers can develop strategies to tackle any difficulties they experience in relation to implementing the new vision or direction of the organisation.



The teambuilding workshops have offered:

- The chance for managers to build formal and informal relationships – specifically between the CEO, senior managers and other managers or key staff.
- A space for shared reflection, resolution of tensions or conflicts, and to enable managers to develop a “shared language” around the change process.
- A space for management to ask the question: “What’s happening now?” and make adaptations and subtle adjustments in their approach to the change process.
- A space in which the CEO has the freedom not to be seen to have all the answers. S/he can lead – offering vision and inspiration – at the same time as participating in a reflective process with his or her key staff.

The consultants’ role is also quite specific – the consultants don’t have the answers either, but are there to be both facilitator and coach, to offer creative and enabling processes and some tools and frameworks to help managers reflect usefully on their experience of the change process. Although the change process has not been easy in either charity, the coaching and teambuilding has offered a safe container in which difficulties can be expressed and addressed. While many traditional change management programmes are based on the assumption that a “plan” is “rolled out”, this intervention acknowledges that successful change processes require ongoing adaptations – including sometimes substantial changes to the original plans – as well as quite challenging culture change. Change initiatives are significantly enhanced when senior and other managers work quite intensely on process issues – issues to do with values, style, and relationships which may not be addressed in more mechanistic and task-based approaches to organisational change.

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Some of the factors that may undermine change processes in organisations include the varied competencies of managers, their own abilities to cope with change and their conscious or unconscious levels of support for the change – especially if their own interests appear to be compromised.



The process I have outlined helps to bring the informal chat and anxieties into the room, as well as giving managers a chance to explore the underlying dynamics which can enable or hinder a change process.



The overall impact of these interventions has been to achieve significant culture change across both organisations. One of the clichés of change literature is that we need to “be the change we want to see.” Management is seen by staff to be “on the same page”, and at some almost unconscious level, senior and middle management are seen to model the change process and the values of the organisation. In particular, in both organisations a silo culture has begun to be broken down. As senior and middle managers are perceived to be relating and communicating positively with each other across the organisation, front-line staff begin to mirror the behaviour themselves.

*as senior and middle managers are perceived to be relating and communicating positively with each other.... front-line staff begin to mirror the behaviour themselves*

In the London charity, the final management workshop was spent reflecting on what kind of management culture had been nurtured by the year-long process, and the value of the days and the coaching. Managers noted that initially they had not known what to expect, but had come to trust and value the process, which had delivered more specific outcomes and had real impact on their work and management style.

These are some of the things people said:

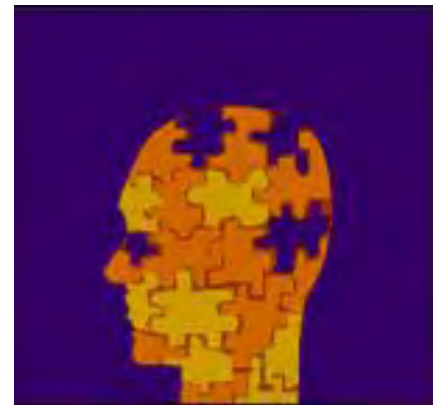
- This has been a process of cohesion and clarification, helping us to continue to refine the change and move together. It is about “common sense making”.

[I really like the double sense of this last phrase – and do not know whether it was intentional at the time. The process has involved joint sense-making, and shared commonsense-making.]

- At the start of the management development process we weren’t sure what it was or where it was going. But we couldn’t have got where we are now without it.
- We have developed a new approach as a management team and new managers will be brought into it naturally.
- We have looked at the changes and why they had to happen, the need to break down silos and put the client at the centre. The change needed to be built from the ground upwards. There have been significant and quite painful changes. The management development process has been valuable to equip us all as managers to manage the process.

- The workshop days are valuable to build consistency and reinforce it. My perception is it hasn't been an easy transition and some people have left.
- The days have enabled us to develop a management culture – I have come in new feeling I was able to contribute to it.
- The process has looked easy but there's been a lot going on under the surface.
- It feels like a long time ago that we started this – it feels we're in a very different place as an organisation, and it has been evolution rather than revolution.
- This has been a relational process, most organisations have milestones and goals, and don't pay enough attention relationships and process.
- What's not happening here is divide and rule, the opposite of that is collaboration.
- The hardest thing has been to let go of a rigid agenda and framework and just trust the process.
- You always get the sense with these days that it's a room full of peers, and the baggage of job titles and status gets left behind.
- It has given us the chance to get to know whole team better, and start working on shared values that motivate us, -- we need to ensure the opportunity for conversations like this doesn't get lost.

The image that I have frequently been aware of during these processes is that of tectonic plates shifting and sliding into place (not that I am any kind of geologist) or the way we turn and move jigsaw pieces until they fit. The coaching and the team days give managers the opportunity to align themselves with each other and the overall vision of the change process. This isn't always a comfortable process; there are "crunches" as the pieces shift around. And of course as soon as they have reached alignment a new force may require them to rediscover yet another temporary settlement.



*coaching and the team days give managers the opportunity to align themselves with each other and the overall vision of the change process*

And is there proof that the change can be sustained? In preparation for this article and six months after the end of the programme at Youth Home, two participants responded to my request this week to let me know the longer-term effects of the coaching and teambuilding.

One replied:

- The course clarified and improved the whole management group's dynamic and identity. There is more understanding of the team's responsibility as a

whole for managing the Centre, not just at SMT level.

- The course was an opportunity to get to know individual group members better, this has helped working together since.
- It was also an opportunity for everybody to give their opinion/thoughts in a non-hierarchical and non-judgmental arena – I personally, have since found it easier to give my opinion within the group.
- The programme also reiterated that YouthHome value the management group and want to invest in each of them and spend time nurturing their various skillsets.
- I think the programme helped to encourage some of the management group to own the change process and to help all of us see we have responsibility to carry this through.
- The personal coaching has comprehensively helped me improve my confidence as a member of the SMT and has challenged me to make some changes around how I view my role in YouthHome.

And the other replied that the coaching had:

- Enabled me to identify strategies and solutions to overcome potential barriers or problems in my work;
- Encouraged me to promote and raise the profile of the work I do with colleagues and SMT.
- Introduced me to a wide range of reading material which has assisted with my professional development.

***Too often, senior management may delegate [a change programme] to middle management without giving time to examining the changes they need to make to their own culture and communication***

Too often, senior management in organisations believe that implementing a change programme is about designing a new organogram or communicating a strategy. They may delegate this task to middle management without giving time to examining the changes they need to make to their own culture and communication. They neglect the difficult part, which is also the less visible part – helping people through the change. This involves understanding that staff and managers may have difficulties with the change at many levels, some hard to articulate. Changing an organisation means changing a culture and often changing the common language as well. This is best done by bringing all managers at different levels of an organisation together, and giving them enough time to explore the implications of a change process for their work and the way they work together. Offering one-to-one support in the form of coaching can also be helpful.

Because this involves working with the less visible process, relationship or shadow side of an organisation, managers may neglect to include interventions in an area which some managers may find “wishy washy” or in which they may look for concrete added value. Some managers will personally find a coaching or process approach to change difficult, and may even block it for others. Oddly, it is often the

most competent CEOs and managers who expect and derive the most value from coaching; while some, often senior managers are resistant to engaging in a process that they believe is remedial rather than developmental. However, senior managers need to attend to the more personal and relational aspects of organisational, team and management development if they want really effective and sustainable change.

### **About the author**

**Vicky Cosstick** is a facilitator, coach/mentor and consultant. She specialises in working on change and learning at board, senior management and team levels in the international development and charity sectors. She has the MSc in Change Agent Skills from Surrey University. She has also worked as a journalist and editor. She can be contacted through [www.changeaware.eu](http://www.changeaware.eu)

# Can line managers ever be effective coaches?

Jeff Matthews



*In this article, we explore the difference between being a coach external to an organisation and being a coach as a manager, internal to the organisation. We contrast two types of coaching contracts that emerge, one for developmental or 'executive' coaching (often provided by an external coach) and the other 'performance coaching' as provided by a manager responsible for practical implementation of the OD agenda. We suggest that much of the training provided for internal coaches has not dealt with the particular challenges that managers face in the corporate environment, in particular the power imbalance, a vested interest in the outcome of the coaching and strong pressures to be directive in a*

*coaching conversation. We propose a definition and methodology for 'performance' coaching which we have found to be successful in addressing these issues for internal managers wishing to develop a coaching practice to support their team, particularly during the challenges of reducing expenditure and head count. We offer a practical skill and toolset to the OD manager tasked with the challenge of embedding a carefully considered OD strategy into the day to day operation of an already stretched organisation and pressed management team.*

## Keywords

Coaching, organisational development, distributed leadership, performance coaching, manager as coach, performance management, balanced scorecard, solutions focus

## The Growing Appeal of Coaching

One of the intriguing phenomena in organisational life over the past 20 years has been the emergence of the 'industry' of coaching. From humble beginnings that saw a small number of sports psychologists and coaches in the late 1980s, noticing that their skills in engaging athletic motivation had applications in the competitive world of business, the profession has expanded to draw in professionals from counselling, therapy and other eclectic disciplines to become a 'profession' of its own. Witness the development of Professional bodies, qualifications to PhD level, Professors of Coaching Psychology and an explosion of literature and dedicated consultancies, some turning over millions in revenue.

For those of us involved for more than the past 20 years, the proliferation has been interesting and even bewildering to observe. As with any maturing profession, as it

becomes more developed the different aspects and applications begin to emerge as practices become more sophisticated.

In recent years, a growing number of independent professionals have established themselves as 'executive' coaches, intervening in organisations in a one to one basis, usually with senior managers to resolve particular and contracted issues. Based on these positive experiences of engaging with one another in 'motivating coaching conversations', the idea that managers should become 'coaches' to their staff is one that has become firmly established, and one that we would suggest is very seductive to Chief Executives and Heads of Organisational Development. To that end, a number of organisations have purchased development programmes wishing to create 'a coaching culture'. This is frequently defined as one where managers are seen to 'coach' staff by engaging them in meaningful and motivating conversations. Managers are encouraged to engage both the 'hearts and minds' of the people they employ, joining in co-creating meaningful work that is fulfilling both to them and to the organisation. In return for the investment, an organisation gets a workforce "aligned to its corporate objectives", "signed up to its mission" and behaving just as the carefully devised competence framework says they should. How is coaching able to achieve this impressive list of OD benefits?

A quick scan of the claimed benefits of coaching as a skill, reveal why this method of developing staff has become so attractive. In particular, it has been suggested that coaching is beneficial for:

- Creating motivated and engaged members of staff.
- Addressing areas of poor performance.
- Achieving meaningful annual reviews.
- Personal and professional development plans.
- Conflict resolution and solving relationship issues.
- 'Unsticking' stuck careers.
- Creating personal and professional development plans that add value to the organisation and fulfil the individual.

It is an impressive list and when you have claims from coaching consultancies that "coaching is the single most powerful process ever devised for releasing individual human potential", we seem as coaches to be making some grand claims for what we do. Easy to sell? Perhaps even easier to oversell?

*most managers are struggling to implement ... a time consuming and long winded process*

The list of benefits is one that we, as independent practitioners, external to the organisation, can and do deliver. Yet in our consulting practice, we find that most managers are struggling to implement what can seem a time consuming and long winded process. When asked why this is so often the case, exasperated HR managers mention the fact that many of their line managers:

- Are used to being called upon to solve problems by 'telling'. It is difficult to adjust to a process that seems to focus on asking questions at the expense of offering advice and being directive in solutions and actions.
- Labour under the impression that the only intervention they can use as a 'coach', is a question, and that 'telling' is somehow forbidden, punishable by the 'Coaching Police'. This seems to be particularly the case when the coaching programme is accredited.
- Feel exhorted to enter the coaching conversation with 'an open mind' and 'no pre-conceived ideas'. They find that as the coach they have a vested interest in the solution, have frequently performed the coachee's role before, or know the person they are coaching very well indeed, sometimes having spent more time with them than they have their partner!
- Come to realise that there is an inherent power imbalance in the relationship. Both players are in the power system of the organisation. How objective can the coach be?
- Feel that the whole conversation takes place under significant pressure created by the economic challenge. As a consequence, a shortage of time, resources, money and patience means effective coaching can be difficult.

*'coaching' ... is  
dropped in favour of  
'route one'  
instruction.*

Faced with these feelings, thoughts and impressions, it is easy to see how 'coaching', with its emphasis on questions, is dropped in favour of 'route one' instruction. So, many line managers struggle on. In fact, when we scratch beneath the initial veneer often presented in the training room, where managers are invited to practise coaching skills in artificial role playing exercises, it is clear that very few of these newly acquired skills and ideas are really making their way back into the day to day practise of the trainee coaches. There is rampant use of questions that begin "have you thought about..." or "don't you think that..." – questions that of course are often devices to present a disguised instruction. So the poor team member is left trying to discern the real intent of the manager.

However, it is also clear that being overly directive causes team members to not take responsibility for their performance. One of the phenomena that good coaching is meant to break is that of the dependant relationship, where the manager takes responsibility, often unconsciously, for solving many of the individual's and team's problems. We have heard of teams waiting for a manager to return off leave in order to order a light bulb which needed replacing.

The danger of 'tell' is that it encourages the habit of 'upward delegation', thereby reducing the leadership and management capacity of the organisation. Possibly the most attractive benefit of implementing a coaching culture is the way it encourages a model of distributed leadership, a holy grail of many OD Managers, where individuals take responsibility for their performance and the manager's intervention is regular one-to-one coaching sessions, designed to develop the

capability, confidence and capacity of the individual to perform. If head counts are to be reduced, particularly amongst managers as a result of cuts brought on by belt tightening, then the need for staff to take more responsibility and therefore less supervision is key.

*How can the  
coaching profession  
support managers  
...?*

How can the coaching profession support managers in navigating their way through this dilemma? Whilst the skill of asking effective questions is prioritised in coach training, what are the skills of 'tell' and how do they feature? How is it that some managers leave coaching training with the distinct impression that it is not OK to 'tell', when there are clearly occasions and opportunities where it is the required intervention?

### **Vested Interest in the Coaching Conversation: A Show Stopper?**

Even more fundamental than the dilemma over 'tell' in the coaching conversation is the challenge of whether managers can ever be effective coaches to their team members, where they have a clear stake in the outcome of the conversation. Indeed, if their own performance appraisal and success in their role is directly influenced by the effectiveness and outcome of the session, how does that affect the dynamics of the conversation? A manager will always be seen as the representative of the "big powers", as directly presenting the OD agenda. Intelligent, free thinking members of staff (often recruited for those qualities) will see through the manipulation of a conversation to "push the corporate agenda". And that's what managers are required to do. Their own performance will be judged, in some degree, by their ability to get their team and themselves aligned to the corporate objective. Values statements, competence sets, 360 appraisals, performance objectives are all processes and tools for aligning individuals and teams to the corporate good, all ways in which the organisation seeks to grow and develop through mechanisms of "tell". To the cynical employee, coaching can appear as just a more sophisticated tool in "making me do what you want me to", an elaborate manipulation.

Using internal managers as coaches appears nice in theory, but in the face of these kinds of pressures can a manager ever truly be an effective coach to their team?

*In most coaching  
processes, there is  
clearly a power  
relationship at play*

In most coaching processes, there is clearly a power relationship at play. It is not a conversation between equals. The manager will enjoy, at the very least, positional power given by the organisation. He or she will have a vested interest in the outcome of the coaching conversation. Frequently, the manager may well have performed the role of the coachee before and know from experience what needs to be done. Hence, there is a risk for the manager to decide in advance what the coachee needs to do. Add in the pressures of time, money and personal reputation and not just as a coach but also as a leader and manager in the organisation, and it is easy to see how 'coaching' loses out to 'route one' instruction.



For all these reasons, the argument for using external coaches is very compelling, especially in the current economic environment, where there is increased pressure on managers to improve financial performance, and trust relationships between managers and their teams are stretched to the limit. An external 'executive' coach, brought from the outside into an organisation can enjoy the 'luxury' of independent detachment. Outside the system - and therefore the power structure at play on a day-to-day basis in the organisation - but hopefully aware and sensitive to it, external coaches can be disinterested in the outcome of the conversation. Without that 'vested interest', they can ask the challenging questions, remain in a position of 'not knowing' and encourage the ownership of the action developed by the coachee, whilst staying out of offering direct advice unless clearly contracted for this purpose. This is a position that the practising manager, engaged in coaching a member of their staff, can never be in.

Many external coaches, when training coaching skills in organisations, seem to ignore this dynamic, training instead the skills from the independent perspective they enjoy rather than the complex and enmeshed relationship experienced by most internal coaches with the people they are coaching. The result can be an OD disaster. We know of an organisation that invested many thousands of pounds in developing a cadre of highly qualified coaches, only to find that the skills were not usable in the demanding performance environment they found themselves in and were reserved for the high days and holidays of a mentoring programme for junior members of staff. In consequence the OD impact of the programme was virtually nil. It was only when some of the tools and techniques identified in this article were deployed did the full investment in the attitudes and skills of the coaching training they had bought become fully realised.

Much coaching training we have seen and experienced is silent on this issue. It assumes that there is only one type of coaching conversation, one that we might style as 'developmental coaching', where the coach is a disinterested outsider and there exists an 'equal' or even 'one-down' in the power relationship. Contrast this with 'performance coaching', where the subject of the conversation is frequently the effectiveness of the individual within their role and the coach is often their line manager.

So can an internal manager ever be an effective coach? In our experience, the coaching profession has not, as yet, provided adequate answers to this question. Until it does, it can be accused of overselling the notion of creating a 'coaching culture', where all employees can engage in supportive conversations in some kind of coaching 'never - never' land. There are very few organisational cultures living the values needed to support this kind of programme. We need to design an industrial strength intervention that can withstand the pressures present in many

***Much coaching training ... assumes that there is only one type of coaching conversation***

organisations made even more toxic by the worsening external economic climate.

### **A New Definition and Model for Internal Coaches**

This model is something that we have been working with for a number of years, stung by prospective clients demanding to know if it 'really works' and 'can everyone be a coach?'

When challenged, we are careful, initially, to define our terms. There are an increasing number of definitions of what is meant by 'coaching'. Aware that this is a semantic minefield and that there are a number of vested interests in defining the term coaching, we have developed the following definition. This simply (but not simplistically) states that: ***Coaching is any conversation in which we support another in making progress towards a preferred future.***

We adhere to this definition for a number of reasons:

- It places an emphasis on 'supporting another' (not 'helping'), and so implicitly keeps the agenda and action with the coachee or member of staff.
- It is future-oriented. In 'making progress toward a preferred future', we are proposing a process that favours a conversation focused on creating a better future, not in analysing the mistakes of the past. As coaches, we see ourselves as being in the business of selling hope.
- It is positive. By putting emphasis on 'making progress' we see each coaching conversation culminating in agreement on a small step, no matter how small, to be taken in the next 72 hours. That step is contracted for and followed up. This simple action can give the manager a very effective early warning system if things are not progressing as planned.
- It clearly states that coaching is 'a conversation' (not a monologue or a manipulation), albeit one with a very distinctive purpose. If you have the skills of conversation, you can be a coach. We stay out of the trap of making 'coaching' something special for 'special occasions', or an elitist skill to be carried out by a chosen few.

In developing our coaching practise, we have found the future-oriented, strength and resource based approach called 'solution focussed' to be very effective. Based up on the significant work of Steve DeShazer and Insoo Kim Berg, this way of engaging in one-to-one conversations emerged in the 1980s from the Brief Family Therapy Centre in Milwaukee. Their view that "what got you into a situation is not necessarily going to help you get out" is refreshing as it breaks the need to over-analyse problems, which we find creates a sense of being 'stuck' and a negativity that is not helpful in creating change. Instead, the past is a rich area for skills, strengths and resource that can be brought to bear on making progress (rather than of analysis, deficit and blame). Closely allied to the field of positive psychology, we

*the future-oriented,  
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approach called  
'solution focussed'  
to be very effective*

*a solution-focused approach ... can be applied to either 'developmental' or 'performance' coaching*

find this approach generates naturally high levels of energy and engagement along with a very practical toolset, which we will consider in a moment. Our definition of coaching is underpinned by the values and tools implicit in 'solution-focused' methodology.

This use of a solution-focused approach is one that can be applied to either 'developmental' or 'performance' coaching, as we have defined them, where the coach may or may not have an interest in the outcome of the conversation. Why? The key is in our definition of coaching as making progress 'toward a preferred future'. When we put the definition up on a presentation slide, the sceptics in the training room all chorus, "whose preferred future are we talking about?" In developmental coaching, influenced as it is by a person-centred, non-directive approach pioneered by Carl Rogers and others, our focus is clearly the preferred future of the performer. It is the performer's agenda that sits centre stage and that is how ownership and commitment are generated and maintained in this approach. The coach is a catalyst in the process, remaining unchanged and unaffected.

Contrast that position with that of the line manager in performance coaching as we have described. Here the 'preferred future' is potentially far more complex. Firstly, it is a future that is shared by both coach and performer and may look rather different from their positions in the system, and as such we see this as a future that will require negotiation. If the conversation is taking place within the context of an organisation, there will be a number of other parties with a stake in that future, including customers, shareholders, government institutions, etc. The OD agenda will loom large here: the need to create a clear connection between the individual's performance, that of the team, through to division and on to the corporate level objectives.

### **What Happens When there is a Crisis?**

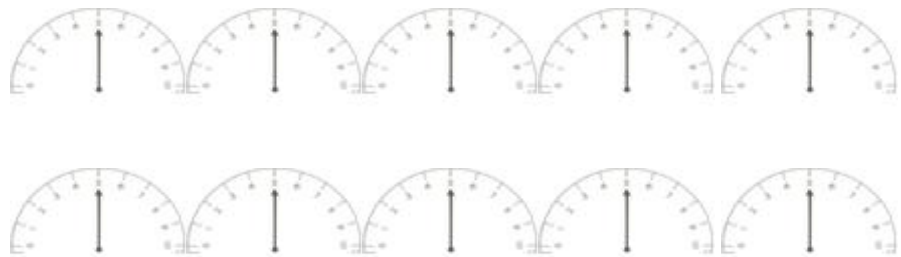
What is the manager's responsibility in keeping the coachee engaged in a programme that he or she does not feel fully committed to or obligated to follow? What happens when the future that the organisation wishes to create is not shared fully by the coachee, when they don't buy into the OD agenda? Also, if performance coaching for line managers puts a premium on both 'telling' and 'asking' as equal core skills in 'performance' coaching as we have described it here, where does the conversation start? Which comes first – do you 'tell', laying out the overt OD agenda, or 'ask' how they are doing?

Our experience is that it is possible for a manager to sustain the constructive relationship of the coaching conversation in such 'difficult situations'. To make this work a number of things need to be in place and paid attention to:

- The manager's and the organisation's agenda needs to be overt – not disguised in the form of leading or manipulative questions. That means

needing to be clear about what each party wants from the conversation, which should be clearly contracted forat the outset.

- Both parties must have a prioritised overview of what is important. In our coaching practice, we achieve this by creating a simple way of representing a personalised balanced scorecard using the visual metaphor of a dashboard. We draw on the imagery of old-fashioned analogue flight cockpits, where the pilot is faced with an apparent riot of dials. To avoid information overload, these dials are grouped and pilots are required to keep their eye on only 10 things at once. Also, dials are calibrated so that when things are performing well, the pointer is straight up. This means that the pilot flies the plane 'by exception', with their eye drawn toward what needs paying attention to. Similarly, in prioritising what is important during the coaching dialogue, the personal targets of the coachee are represented as 10 dials. By doing this the agenda for the performance coaching conversation becomes self evident.



- Managers need to establish a clear performance agenda at the start of the planning cycle. In this way the manager's and the organisation's agenda is overt and negotiated up front. The test is to be able to answer the question: "How will we know you are being successful?" It alarms us just how many people within organisations, at all levels, cannot answer that question.
- Coach and coachee need to be clear about what they are trying to achieve. What are the individual's performance goals for the coming year, in the context of the team's goals and those of the organisation, and can they make the connection? In developing this thread of linked goals, we find it helpful to think in terms of three different types of goals – dream goal (what you are trying to achieve) performance goal (what that means in measurable terms) and process goals (things that will contribute towards success). A clear articulation of these three goals provides the individual with the sense of where they fit – where their piece, no matter how small, fits in the success of the whole. This helps individuals find the meaning within their role and helps break down the "I'm only a..." mindset which limits people's ability to contribute to their full potential and make a difference to the organisation's and their own success. We find this part of the process to be the most effective in delivering the OD goals of a

*we find it helpful to  
think in terms of  
three different types  
of goals*

*Everyone needs and sets their own targets*

coaching intervention, supporting people in feeling they are part of something significant and worthwhile.

- Everyone needs and sets their own targets. In our coaching sessions, we go as far as setting targets for every individual in the organisation, clearly aligned to the goals of the organisation, created in a coaching dialogue between the team member and the manager.
- Targets need to include the 'how' the person will behave as well as the 'what' they will achieve. Many organisations have developed sets of management and leadership competences, but few have managed to fully integrate them into a regular performance review. We seek to achieve that with this approach.
- The individual targets need to be made simple and visible. The creation of the measurement dials has two stages to it - the clear labelling of what the target covers and then the establishing of clear expectations for the coming year. Managers can find this surprisingly challenging, even though we apparently have had over 70 years of performance management in organisations. It often requires a clear distinction to be made between 'inputs', 'outputs' and 'outcomes'. The connection between these targets also needs to be understood. We are working with a 'balanced scorecard' here. Considering the organisation as a system, there is significant risk in over focussing on one aspect of performance. This has been explored in the writings of John Seddon and others in the area of systems thinking (5).



- It is crucially important that the expectations on performance are within the control of the individual. Often we find managers setting targets that are outside the performer's control, such as 'reduce journeys to work by car for all staff by 10%'. As a manager you would need to establish what things the individual can put in place, that they have control over, that would achieve this. This has been described in the world of sport as 'controlling the controllables' (6) or using the goal-setting language explored earlier, 'process goals' – the means to an end but not the end in themselves.
- There must be regular reviews. Reviews begin with a look at the dials: Which one or two require the most attention? If possible, use a question framework as the basis of the coaching conversation. Much of effective coach training prizes, rightly, the value of asking effective questions. Sir

John Whitmore popularised the use of the GROW model – a means of offering managers a structure for the conversation. We have developed a version for performance coaching, based on the solution focused tool ‘scaling’ where the focus of the conversation is scored between zero and ten. Adapted from the original scaling tool, the acronym we propose is “HØPES”, where

- H: “What are your *hopes* for this conversation?”
- Ø: “What makes it *not zero*(Ø)?”
- P: “What is the preferred future, what would success be like? ”
- E: “*Exploring* actions and outcomes, what will make a difference?”
- S: “What is the first *small step*, in the next 72 hours?”
- Having established an agreed framework, represented visually, the manager is then in a position to use it as the basis of a regular coaching conversation. We suggest every six to eight weeks although monthly would be good practise.

## Conclusion

Leading in a time of contracting budgets is arguably an even greater challenge than leading in a time of expansion. For this reason, we feel that the distinction between ‘developmental’ or ‘executive’ coaching and that of ‘performance’ coaching is an important one to make for the coaching profession. Doing so forces coaching professionals to recognise that what works for them as independent interveners in an organisational system does not work for the managers within it. It also means organisations will be better able to support their line managers with a set of values, skills and tools that are relevant to the current pressured economic situation. This is particularly important in the public sector organisations faced with unprecedented cuts in budget. For OD professions, it offers a practical tool and skill set to convert top level strategic intent and well thought through strategy papers into practical action and difference in day to day behaviour. We consider the types of skills and the toolset described in this article as crucial in developing the leadership capability required not only to retain the talent and commitment of professionals in these organisations but also to deliver the discernable shift in behaviour described and promised in much OD strategy so carefully prepared by OD professionals.

*what works for  
independent  
interveners in an  
organisational  
system does not  
work for the  
managers within it*

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**Jeff Matthews** is entering his 20<sup>th</sup> year as a coach and facilitator. He has his own coaching practise, The Madison Group, which enjoys a reputation for its breadth and flexibility. His clients include public and private sector clients as well as the world of sport, volunteer and faith based groups. Based in rural North East Worcestershire, he is a qualified supervisor and trainer of coaches as well as working one to one. He still attempts to train and compete as a competition racing cyclist. He can be contacted at [jeff@the-madison-group.co.uk](mailto:jeff@the-madison-group.co.uk) .

# Coachee Preparation

## Getting the best possible start to the coaching experience

Caroline Taylor



### Abstract

*This article explores the issue of preparing people for executive coaching. It suggests that this is a critical element of the process that is frequently overlooked. It links the importance of preparation to the broader organisation objectives and the need to obtain a good return on investment. Finally it offers practical suggestions for how organisations can improve the preparation of coaches in a cost- and time-efficient way.*

### Keywords

Executive Coaching, Preparation, Change, Coachee, Readiness.

### Introduction

Never has the question of return on investment (ROI) been more important for organisations than today. Market intelligence suggests that whilst development budgets have not been slashed as they were in the last major downturn, they are being controlled tightly and the focus is on maximising value.

This article focuses on one specific development solution which is Executive Coaching – an intervention that probably gets more than its fair share of ROI discussions.

Executive Coaching is primarily concerned with improving organisation capability through focused development of individuals. This almost always involves change in behaviour. So, why, when readiness for change is such a central tenet of good OD practice, does this aspect get neglected at the “softer” end of OD interventions?

Poor preparation of coachees is one of the most common weaknesses in coaching programmes. It is often the most costly, especially when it results in a poor match.

*Poor preparation of coachees is one of the most common weaknesses in coaching programmes*

### Research

In today's climate, maximising return from coaching programmes is a pressing priority. Where clients are unprepared there are several likely results:

- Coaches spend valuable and often chargeable time preparing the client



- Clients come to coaching with a degree of uncertainty at best and suspicion at worst
- Some coaches, well briefed by the organisation, find that the client has not had the same information. This creates an undesirable “messenger” role for the coach.

The constraint for organisations is time and resources. Recent research by Jericho Partners found that many HR Directors are keenly aware that their coaching processes need to be improved. They just don't have the capacity to get to it and it remains too low on their priority list. However, under investment in preparation may be a false economy. Fortunately, there are a few important steps you can take to help your coachees get the most from coaching.

### Defining coaching

*From an OD perspective, coaching needs to ... be seen as part of a broader development strategy*

Coaching is still undefined for too many people. This often creates unrealistic expectations on the part of the coachee. The definition also changes depending on the culture, maturity and strategy of each organisation. From an OD perspective, coaching needs to align to the business goals and be seen as part of a broader development strategy. It can't be seen as sitting in isolation. Therefore a common language and understanding of its purpose is essential for sense making and for removing mystique, which often does more harm than good.

#### *Good practice guidelines:*

- Create an agreed description of coaching for everyone to use
- Link coaching to organisation values and goals
- Spend time explaining how coaching differs from mentoring, consulting and counselling
- Don't assume a level of understanding about coaching – especially with senior leaders
- Make sure your coaches, especially external ones, understand your definition

### Deciding purpose and objectives

The need for clarity here is dependent on the seniority of the individual. However, without clear objectives there are many coachees who suspect some form of remedial objective on the part of the organisation. This leads to defensiveness – the question “Why am I here? ” quickly becomes a barrier. It also results in the coach spending time – often more than one session – helping their client to become clear on the purpose of coaching for them.

A lack of clarity and agreement also results in the coachee setting their own objectives. When these don't align to those of the organisation, problems may

follow.

### *Good Practice Guidelines*

- Be clear and transparent about the purpose of coaching
- Create a process that enables reflection and discussion about coaching objectives
- Involve the line manager in agreeing objectives
- Encourage personal goals as well as organisation goals
- Consider a more flexible, individual approach for top executives

### **Personal Readiness**

*For coaching, there are two potential problems here – timing and mindset.*

At a macro level, considerable thought is given to timing and organisation readiness for many OD initiatives. Somehow this gets lost at the micro level of activity – individual readiness. For coaching, there are two potential problems here – timing and mindset.

Coaching programmes are often triggered by specific events such as a development programme or a promotion. Whilst this makes sense, personal circumstances and workload can create potential challenges for coachees. Address this early on – otherwise it becomes a block to engagement and learning.

The mindset of an individual is also critical. An open mind, willing to explore new perspectives and make time for thoughtful self assessment and reflection is essential for successful coaching. Someone who is not ready to make this investment or pays lip service to it is unlikely to get value from the opportunity presented.

### *Good Practice Guidelines*

- Check for work or personal conflicts that may get in the way
- Offer support where appropriate to negate the conflict
- Do some readiness checking – attitude, openness etc.
- Defer the coaching if there are no obvious solutions or the conflict is significant

### **The coaching relationship**

For people who have never been coached, there is great value in spending time preparing them for the coaching relationship.

The more senior a leader is, the less feedback he/she tends to receive. The feedback they do get is often lacking in substance. Leaders often feel a need to show strength; showing vulnerability or uncertainty can feel quite alien to them. They may also be unaccustomed to being challenged!

Therefore, these elements, which feature in most effective coaching relationships,

may initially feel uncomfortable. Preparing an individual for this will enable a deeper level of trust in the process. It also enables the coach to spend more time working on issues that will move the coachee forward.

### *Good Practice Guidelines*

- Be clear about some of the uncomfortable moments – and the longer term gains
- Share some anonymous examples from people who have experienced coaching
- Emphasise the unique opportunity for total honesty and openness without risk
- Be clear and consistent about the confidentiality of coaching

### **Selecting a coach**

Little is written about matching coaches to coachees. However, some simple steps can prepare a coachee to select the right coach.

Many organisations now adopt a matching process which frequently involves some pre-selection and presentation of a number of coaches for the client to select from. This seems to work pretty well but it also requires some guidance for the coachee in their selection criteria.

*An informed, prepared coachee however, often recognises the value of a coach with a different perspective or background*

Research shows that an uninformed coachee usually selects someone with whom they feel safe – often someone very similar to themselves. An informed, prepared coachee however, often recognises the value of a coach with a different perspective or background. This can help to make the coaching experience truly transformational.

### *Good Practice Guidelines*

- Encourage coachees to reflect on what style will best support them with their objectives
- Discuss the merits of similarity and differences in a coach
- Consider the ideal ratio of support and challenge from the coach
- Invest time in selecting the shortlist of coaches – ensure they are different from each other
- Debrief thoroughly after the selection process
- Never impose a coach on a coachee

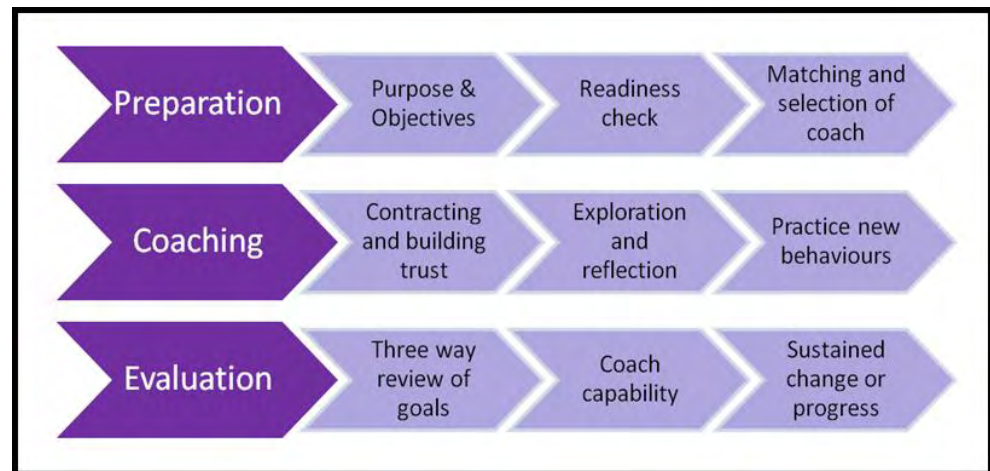
### **Find the time for preparation**

HR functions are stretched like everyone else at the moment so finding the time to prepare coachees is challenging even if the value is clear. However, there is a compelling argument for doing so. Some simple steps which produce big results

include:

- Develop a self-driven preparation tool for individuals before the coaching starts
- Run half-day preparation workshops for a large number of individuals
- Create coaching champions whose role is to brief and prepare people before coaching

#### The desired stages in any coaching programme



Within my own client base, thinking about preparation is paying dividends. One client commissioned preparation workshops for people about to experience 360 degree feedback and follow up coaching. This client is an engineering business that has never experienced 360 degree feedback before and the results were significant in a number of ways:

- The consistency of the message removed cynicism or suspicion which had been a big concern given there had been considerable re-structuring
- There was a greater openness and discussion about the process which aided learning
- The leadership support for the process was visible and gave it credibility
- The quality of feedback provided by raters far exceeded expectations and increased the value for the participants

*Preparing people for coaching doesn't have to be a costly or time-consuming exercise*

Preparing people for coaching doesn't have to be a costly or time-consuming exercise. It enables readiness for individuals and ties the coaching initiative into broader organisation objectives to aid credibility and buy-in.

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## About the author

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# A Coaching Style of Leadership : Improving Customer Service at Southern Railway with Buonacorsi Consulting

**Gill How and Zoey Hudson**



***Making Every Journey Better: a philosophy and vision of continuous improvement for our passengers and staff working in all roles.***

*Our story covers six years of organisational learning and development, created and delivered within a partnership of Southern Railway and Buonacorsi Consulting. The prompt was the then Managing Director wishing to support his managers raise their game through investment in leadership development and individual coaching. From this Southern and Buonacorsi developed and cascaded the approach culminating with winning a National Training Award for the coaching programme in 2007. The programme was able to demonstrate clearly the benefits of enabling managers to acquire coaching skills for use with their staff at a number of levels, including significant statistical links with employee engagement.*

*As part of re-winning the franchise in 2009, the People and Teams Strategy was clarified and communicated. A coaching style of leadership remained a key component of the strategy, together with a desired culture of change and improvement, and the 'Southern Cycle of Success' model remained the chosen tool for focussing, planning and enabling change moving forward. Southern continue to invest in their managers acquiring a coaching qualification to deliver a coaching style of leadership, with a more explicit link to improve staff engagement and, from this, customer service. There are also other coaching and leadership initiatives now in place. The design has led to an internally sustainable solution, now also provides an internal coaching service and is part of leaving the historic 'command and contro' railway culture in the past. The Executive see a coaching style of leadership as key to supporting their desired culture and the style of leadership is embedded in the business strategy and model.*



## **The Start of the Coaching Journey**

How did the story start? Southern Railway is a train operating company employing approximately 4,200 staff and operates train services between London and

Brighton, along the Sussex coast and within the south London metro area. Buonacorsi, which means “good travelling companion”, is a coaching and change leadership specialist, led by Gill How. Buonacorsi works in partnership with client organisations to create and deliver solutions which enable people and transform results. Following the start of its six year previous franchise in 2003, Southern embarked on an investment programme costing around one billion pounds which resulted in a new fleet of trains, refurbishment of its train maintenance depots and stations, and substantial investment in customer service training.

To build on this, the then Managing Director, Charles Horton, sponsored a training programme to invest in the leadership capability of senior managers, to equip them with skills and knowledge necessary to move the organisation forward. With Buonacorsi he then identified that coaching could help managers build the bridge between the leadership training and implementation of the associated learning in their day to day work. The initial application of the coaching was to help managers develop a positive appreciation of their 360 degree feedback, and to set goals to enable them to move forward with their own development.

*... to equip managers with the coaching skills themselves which would also ... create a sustainable solution*

What we learnt from this initial investment in coaching was that Southern managers really liked it. It helped them to take ownership of their own development, and gave them the confidence to tackle all the conversations they needed to be having with their team members and own managers as they moved forward. The idea developed to equip managers with the coaching skills themselves which would also enable Southern to create a sustainable solution.

After a number of training experiments and research into options, a commitment was made to offer a coaching qualification to a pilot of 18 senior managers from a range of disciplines in the organisation. The then Operations Director, Chris Burchell, was asked to be sponsor of the pilot, and was a participant too. Half way through he was promoted to Managing Director as Charles moved on and his commitment to the coaching programme fortunately remained intact!

So what exactly is the coaching programme? It is a bespoke design, delivered over an eight month period, culminating in a Level 5 coaching qualification from the Institute of Leadership and Management (ILM). This choice gave Southern and Buonacorsi the flexibility to deliver the curriculum in line with the learning style of the managers, complemented by the rigour of an external qualification.

To gain their coaching practice, managers coached colleagues from other areas of the business, to resist the temptation of offering too much advice! For the managers, the outcomes from the coaching were thrilling: a tangible example being a coachee gaining confidence to apply for a promotion and being successful! For the Head of Organisational, Leadership and Behavioural Development (L&BD), Zoey Hudson, there were a number of additional benefits, such as coaching skills

becoming an integral part of how performance and development conversations are held in the organisation. For the newly appointed HR Director, Matt Watson, the coaching programme became a critical component of the overall HR “Cycle to Success” strategy – again the bridge between knowledge and implementation, theory and action.

### **Moving Forward & Business Results**

The business case to fund the second programme was a challenge. Enthusiasm and anecdotal evidence were not initially enough to get the programme approved by the Southern board. Fortunately, by then links with the programme and improvements in business measures were beginning to come through and there was acknowledgement of the contribution made by coaching. Seven Southern Executive Group members have now attended and sponsored four programmes, with a fifth one about to start.

*“a coaching style of leadership...creates an improvement in employee engagement which...improves customer satisfaction”*

This is clearly one measure of the level of commitment to the programme, with a total of approximately 80 managers now having been through or currently attending the fourth programme. Let’s recap.

#### **Why is Southern continuing to invest in this way?**

Two main reasons – the first is to develop a coaching style of leadership which has now been clearly demonstrated to create an improvement in employee engagement which in turn improves customer satisfaction. The second is to create an internal coaching service that offers developmental coaching to all members of staff.

#### **How do we manage the evolution of the service?**

We now have a Coaching Steering Group, comprising representatives from Operations, Engineering and Commercial areas of the business as well as HR and Buonacorsi.

#### **What are the results from the investment?**

These are things that have happened over the first four years, where Southern management believed a coaching approach had contributed to the success:

- Best train service performance ever on the network.
- Best Train reliability ever.
- Best Customer Service survey results ever.
- Staff customer service measures improving.
- Staff Turnover reduced by 30%.
- Absence reduced & among the best in the Industry.
- Grievances, disciplinaries & tribunals reduced.
- Staff engagement results improving.
- Staff want Govia to re-win the franchise.



- National Training Award for Coaching Programme.
- Maintenance Team of the Year, National Railway Awards.
- Staff Assaults at lowest level ever.
- Awarded the Gatwick Express .
- Smooth integration of Gatwick Express brand.

These results are very impressive, and certainly ones to be proud of. However, what they do not convey is the personal change and development it has meant for so many Southern managers. Here are some examples of what managers who have attended the programme have said:

***“The programme was my journey of self-awareness”***

***Revenue Manager, West Croydon***

*“For me the coaching journey has been about discovering that you can be a far more effective leader if you develop your coaching skills. Learning to be a powerful listener instead of a ‘good talker’ – learning to ask the right questions makes it easier to get more from people.”*

Selhurst Train Care Depot Manager.

*“The programme was my journey of self-awareness. It made me realise that I did not actually listen to my staff enough and that my values of “say it as it is” and “up front” views came across as aggressive or ignorant. I am looking forward to the future with coaching and I can’t see managing people in any other way”.*

Revenue Manager, West Croydon.

*“This isn’t just about coaching, it completely changes the way I think about talking to people.”*

Financial Controller, Southern Head Office.

*“Most of my working life in the armed forces, prison service and on the railway has involved discipline without asking why. Since completing the course, I now use coaching as a tool to encourage staff to see how they can make changes to avoid potential disciplinary issues. It helps me tremendously to bring out the potential in my staff.”*

Conductor Manager, Brighton.

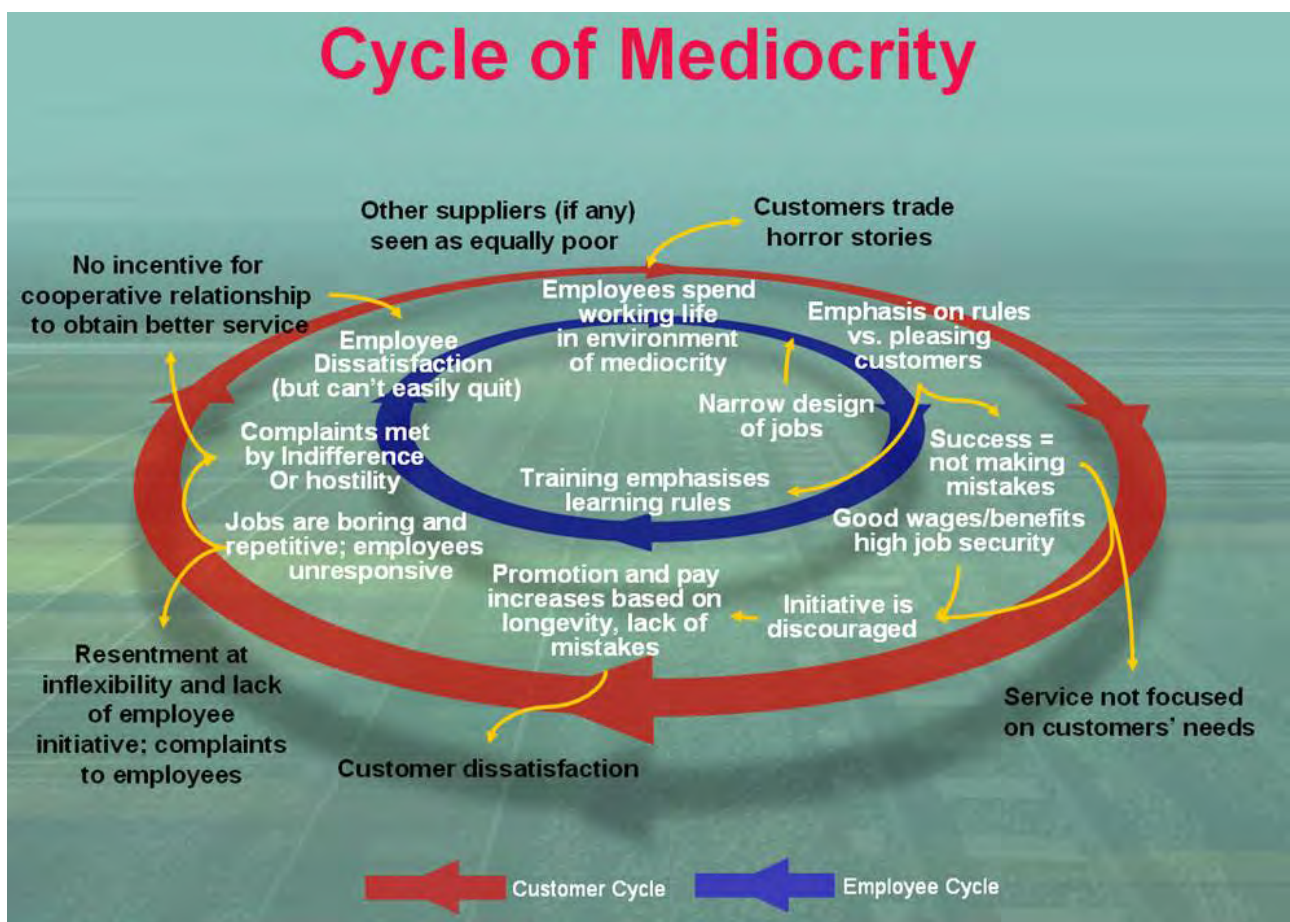
Chris Burchell, the Managing Director says:

*“Southern continues to be a very successful business, consistently delivering the high standards of service our passengers deserve and have come to expect. I think an element of this is definitely attributable to our focus on developing the leadership and management style. I see the coaching program as a key part of developing our business. It has fundamentally changed and shaped my behavioural approach to work.”*

## Links with Organisational Development

*“finding significant statistical links with employee engagement gave us a new vista”*

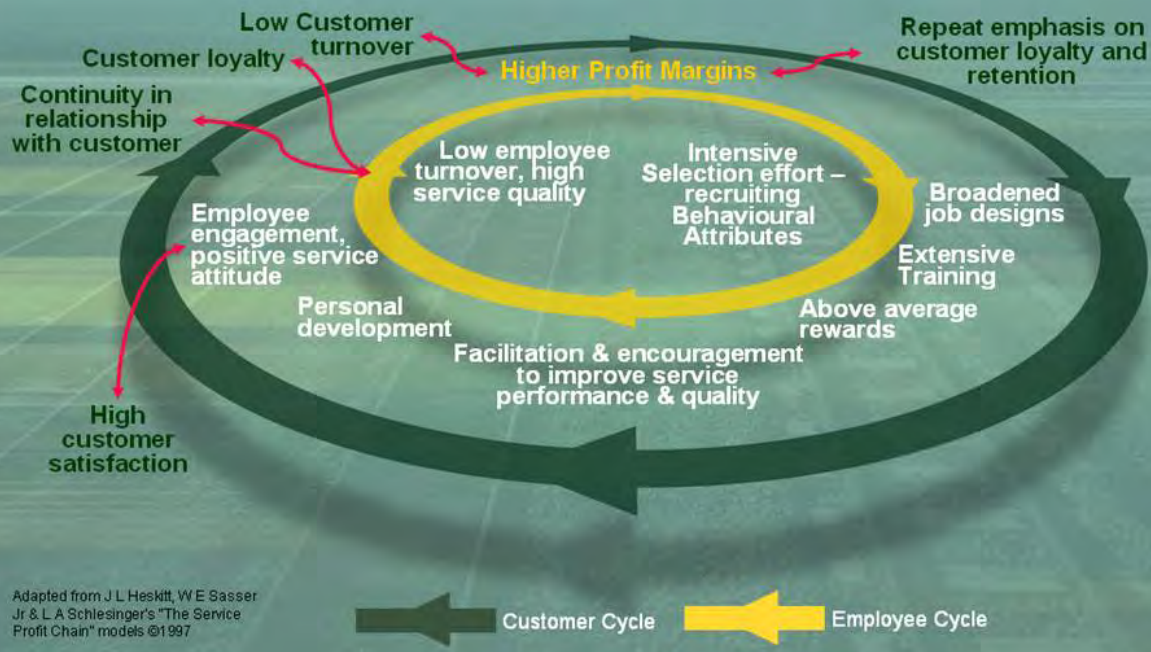
It would not be fair to say that the journey started with organisational development as the frame in mind. Investment in the skills of the managers to help them raise their game was the initial prompt. The coaching was popular and Southern were able to see patterns and trends in outcomes from the coaching investment, as reflected back to them at quarterly intervals by Buonacorsi (an explicit part of the contract with all stakeholders.) Evolution much more accurately describes what happened, enhanced by rigorous analysis over time of what went well and what would make it better still by the design and delivery team. Finding significant statistical links with employee engagement gave us a new vista with which to consider the impact of the programme and how to extend it.



The introduction of the Cycle to Success model adapted to Southern by the HR Director as the cornerstone of the HR strategy initially caused confusion as the links between the coaching programme and the model were not clear. It caused us to think, challenge ourselves and raise our own game in relation to how coaching could and can contribute to the development and results of the entire organisation.

# Southern Cycle of Success

Our business philosophy clearly links staff engagement and customer satisfaction with profitable growth



En route the coaching programme also allowed a number of Organisational and Leadership spin-offs. Each year we thought of ways to extend the approach to wider and wider populations of managers and staff. The annual performance management conversation was revised – all managers were trained on a one day course to deliver these in a coaching style and for the first time behaviours as well as outcomes from objectives were discussed and taken into account. The leadership competencies expected from managers were developed and made explicit in an up to date way for new ways of working. A coaching module is now offered to all managers as part of leadership development.

The demands of the new franchise, won in 2009, made staff engagement, achieved through a coaching style of leadership, a key tool to improve the customer service metric. The new business model 'Making Every Journey Better' informs priorities for investment, putting customers at the heart of every decision Southern makes - a more demanding aim in the current economic climate.

The internal coaching service offers tailored development to all managers, helping to raise confidence and performance in changing and challenging circumstances. The skills of the internal coaches are kept up to date with quarterly continuing professional development events, and access to support in relation to the coaching they deliver.



*“Evaluation has [used] a range of tools.....Our ability to learn and plan next stages..... and allow organisational development factors and nuances to emerge over time.”*

A coaching style of leadership and an internal coaching service at Southern is now viewed as a powerful tool which can help the organisation in overall terms:

- Improving staff engagement.
- Improving customer service.
- Development of managers and staff.
- Supporting the desired culture.
- Supporting the business strategy and business model.

Recent research from the Institute of Customer Service confirms that companies with a reputation for service excellence and committed frontline staff have a 24% higher net profit than same-sector rivals who do not enjoy similar standing, and can achieve 71% more profit per employee. The Southern Cycle of Success was adapted from The Service Profit Chain (Heskitt, Sasser Jr Schlesinger's (1997).and The “Service – Profit Chain” model developed by Heskett, Loveman et al. (1994)

Evaluation has usually followed the Kirkpatrick model, looking at initial learner reaction, application of skills, changes in behaviour and changes in business outcomes. A range of tools such as coaching skills 360s at the start and end of the programme, feedback from colleagues and coaching clients, employee engagement surveys and customer satisfaction metrics are used.

All of the above show quite a shift from the initial role and purpose: individual coaching sessions from external coaches to assist individual managers to develop a more appreciative understanding of their leadership feedback!

## To conclude – perspective from Buonacorsi:

What has it meant to be the coaching partner on this journey? It has been and continues to be an amazing experience. The factors that single the experience out are really very simple. They relate to:

- The quality and commitment of the leadership and sponsorship from the Southern's Managing Director and other Executive members.
- The quality of the working partnership with HR and OL&BD.
- Our ground rules about transparency and learning together.
- The fundamental belief of the value of coaching as a tool to allow people to offer their potential.
- Our ability to learn and plan next stages which link to the business strategy and business model, and allow organisational development factors and nuances to emerge over time.

Buonacorsi has found it an immensely satisfying professional experience to work in partnership with Southern, a fabulous opportunity to create something tangible together, delivering worthwhile outcomes we can be proud of at every level. And best of all, it's by no means the end of the story, with challenges to consolidate, embed and make this better still, within the challenges of the new franchise, in time still to come.

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## About the authors

**Gill How** has over twenty years experience of designing and delivering leadership and coaching programmes, executive coaching, leadership development, organisational and team development, strategic and strengths-based change programmes and facilitation of customer/supplier relationships. Gill set up Buonacorsi Consulting in 1995 offering high quality and tailored work and has a focus on creating a solution sustainable by the clients themselves. In 2007, in partnership with Southern Railways, she won a National Training Award. Her previous career experience includes Digital Equipment, Xerox and British Gas where she has held a mixture of external and internal consulting roles.

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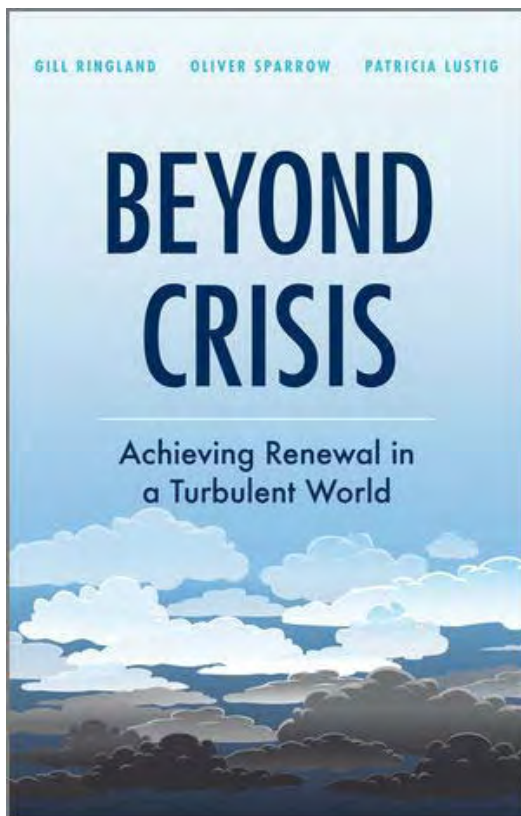
**Zoey Hudson** is Head of Organisation, Leadership and Behavioural Development at Southern Railway. Zoey is passionate about developing the leadership capability and effectiveness of the workforce, encouraging heightened self awareness and nurturing potential throughout the organisation to bring about cultural change. Zoey has been in this HR strategic role since 2006. Prior to that she was the Vocational Training Manager managing core training skills activity and introducing new innovative approaches to traditional training methods Zoey is a qualified, practising internal coach and is a licensed and experienced practitioner in the use of various behavioural instruments.

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# On the reconciliation of hedgehogs with foxes

## A review of *Beyond Crisis: Achieving Renewal in a Turbulent World*

David McAra



### Beyond Crisis: Achieving Renewal in a Turbulent World

by Gill G. Ringland, Oliver Sparrow and Patricia Lustig,

ISBN: 978-0-470-68577-8, 346 pages,

£19.99 / €24.00 from the [Wiley website](#).

*Do you know the one about the Fox and the Hedgehog? If you're like me, you'd have to answer, "Errr ... not really." One of the most captivating metaphors in 'Beyond Crisis' alludes to a fragment of Greek verse by Archilochus, explored in a famous essay by Isaiah Berlin. "The fox knows many things but the hedgehog knows one big thing." is how the authors render it here. Scholars may easily find the original Greek and diverse interpretations by googling 'fox and hedgehog'.*

The central proposition of the book is that organisations which manage to blend the contributions of both 'hedgehogs' and 'foxes' are more likely to weather present and future crises and thrive on the new opportunities they provide. I love this idea, the age old challenge of organisational learning, to have our cake and eat it. How can organisations integrate the very different processes necessary for sustaining routine performance with those required to generate insight and renewal, in other words, the contributions of both hedgehog types and fox types?

The answer offered by this book is to develop a 'Purposeful Self-Renewing Organisation', rather awkwardly abbreviated as a PS-RO. The book describes this model, representing it as two cones arranged to resemble an egg-timer, where the top cone, base uppermost, is the realm of the hedgehog, the reliable but predictable operator. The lower cone, through the neck of the egg-timer, is where a whole different set of mechanisms for sensing and responding are needed, where the wily and more versatile fox is alert for changes in the wider

environment, for new constraints and opportunities and for new approaches and possibilities. The qualities of such an organisation are described at some length in the book along with many practical tools to help cultivate them.

I strongly agree with the underlying premises of the book – that the days of ‘business as usual’ are gone for good and that radical change is necessary. Successful adaptation in the face of crises depends on the ability to escape the constraints of a prevailing world view. With any paradigm shift, those who start to glimpse the possibilities of the new one must struggle to maintain communication across the gulf to those trapped in the old without being cast out as heretics.

It seems to me that this is what the book is striving to do, to speak to the managers who are operating successfully in the prevailing paradigm and help them:

- see the scale of the crisis with its accompanying hazards and opportunities
- sense more effectively the important external and internal signals of change and so,
- increase the resilience of their organisations,

To accomplish this, the authors are trying to make the worldview of the fox accessible to the hedgehog. However, they underestimate the difficulty of accomplishing this transformation. The depth of the crisis is still not widely recognised. Neither is the urgency of the need for change nor the fundamental nature of the changes required. We seem to acknowledge that our way of life is not sustainable but somehow without recognising that if we don’t change, our society will ultimately collapse. ‘Business as usual’ is still much the expected outcome when things get back to normal.

I really wanted to like this book but the authors rather got my hackles up at the very beginning with a bold assertion in the preface that we should listen to them because they are experts. If an expert has the answer, then I believe we are asking the wrong question. However, in spite of finding it rather a heavy read and never quite warming to it, I shall certainly look again at the many practical tools for uncovering new ways of seeing organisations in their various, challenging environments.

If anyone is still struggling with the animal metaphor, the big idea of the hedgehog is to evade its predators by curling up into a prickly ball. The dissenting interpretations differ in their belief whether this is or isn’t always enough to outwit the more versatile fox.

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Referenced 8 October 2010



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Best wishes. Deb, David and Bob  
(*e-O&P* Working Party)

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