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The Evolution of a Professional Coach

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Submitted to the Program of Organizational Dynamics in the Graduate Division of the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania Advisor: William Wilkinsky

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The Evolution of a Professional Coach

Abstract
This thesis describes my journey of self discovery and renewal as I reinvented myself from my position as a sales and marketing manager in a corporate setting to that of a professional coach in private practice. I discuss my rationale for change and what precipitated it, how I became a graduate student at the University of Pennsylvania and how the Organizational Dynamics program prepared me to become a coach.

I will also detail the role an undiagnosed learning disability played in my life and how I tapped its gifts and utilized my strengths to become my best self.

The psychological foundations for change and my role in each of the steps are outlined. The coaching process is thoroughly examined as I coached my first client using the Wilkinsky Normative 9-Step Coaching model. I present my behavioral coaching model and discuss the principles upon which it is based. Real life coaching situations illustrate how the model was applied.

Highlights from five professional coaching engagements provide insights into the types of coaching that I am currently practicing. I conclude with insights for readers who may be contemplating following in my path with questions and exercises to start them on their own path toward their passion. Finally, I discuss my future in coaching and where my endeavors may lead me.

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by

Mary A. O'Connor

Submitted to the Program of Organizational Dynamics
in the Graduate Division of the School of Arts and Sciences
in Partial Fulfillment of the Requirements for the Degree of
Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2010

THE EVOLUTION OF A PROFESSIONAL COACH

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ABSTRACT

This thesis describes my journey of self discovery and renewal as I reinvented myself from my position as a sales and marketing manager in a corporate setting to that of a professional coach in private practice. I discuss my rationale for change and what precipitated it, how I became a graduate student at the University of Pennsylvania and how the Organizational Dynamics program prepared me to become a coach.

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LIST OF TABLES

TABLE		Page
1	Wilkinsky Normative 9-Step Process of Coaching	24
2	LIFO® Strength to Excess Chart by Style	28
3	Original Skill / Will Matrix	46
4	Modified Skill / Stress Matrix	46

TABLE OF CONTENTS

		Page
ABSTRACT		iii
ACKNOWLEDGEMENTS		iv
LIST OF TABLES		vi
CHAPTER		
1	Introduction	1
	Purpose of Thesis	2
2	The Rationale for Change	4
	When I Hired a Coach	7
	My Learning Disability	9
3	Psychological Foundations of Coaching	13
	The Stages of Change	17
4	The Principles of Coaching	22
	My First Coaching Client	22
	Wilkinsky Normative 9-Step Process of Coaching	23
	Coaching Using LIFO®	26
	The Coaching Sessions	28
	Client Feedback	31
	Data Gathering	33
	The Action Plan	34
	Follow Up	35
	Client Evaluation	35
	Summary	36

TABLE OF CONTENTS

		Page
	Self Reflection	37
5	Developing My Coaching Model	39
	My Coaching Model	39
	The Influence of Athletic Coaching	39
	The Influence of Past Managers	41
	Coaching as a Corporate Manager	45
	The Influence of Psychological Foundations	48
6	Coaching Professionally	51
	Coaching Penn Undergrads to Become a Team	51
	Coaching in a Corporate Environment (As a Manager)	54
	Executive Coaching (Pharmaceutical Company)	56
	Career Transition Coaching (Consulting)	58
	LIFO® Based Coaching (Government)	60
7	Conclusion	63
	Insights for Readers	64
	Exercises	66
	My Future as a Professional Coach	68
REFERENCES		71
APPENDIX		
A	The Coaching Contract	72
B	The Coaching Prep Form	76

TABLE OF CONTENTS

Page

APPENDIX

C LIFO® Descriptor Questionnaire 77

D The 30 Second Elevator Speech Worksheet 79

E Schedule of Reinforcement 80

NOTES 81

CHAPTER 1

INTRODUCTION

This thesis concerns how my participation in the Organizational Dynamics program at the University of Pennsylvania provided the knowledge, theory, and impetus to pursue my passion for coaching others to higher levels of performance. The journey discusses my transition from a corporate career in sales and marketing into professional coaching.

I will discuss what led to my decision to attend the University of Pennsylvania and the courses that led me to choose coaching as a profession. I will delve into the stages of change, how change develops in an individual and the actions that led to my decisions. As I selected my classes, I had an idea that I wanted to experience a broad range of interrelated courses. I knew that I loved to coach my direct reports so I sought out coaching classes to learn more about how I could use coaching in my work.

In my first coaching class, I became a coach and I detail that experience and the Normative 9-Step Coaching Process developed by Dr. Bill Wilkinsky that I followed to coach my first client. It was in this class that I first learned the elements of LIFO® communication styles and became certified to train others in its methodology. I employed LIFO® principles in coaching my first client and have used LIFO® assessments in coaching others as well.

During my academic career, I developed my behavioral based coaching model and will discuss the influences on how it was created and how I applied the model in a coaching engagement. My model was built on a foundation of

coaching from a position of strength, my experiences in business observing past managers both good and bad, my participation in athletics, listening and questioning techniques and sound psychological principles I learned as an undergraduate. Examples of behavioral based coaching in those areas are discussed.

Next, I discuss five different types of professional coaching experiences which include coaching undergraduates, corporate coaching, executive coaching as a consultant, career transition coaching, and LIFO® based executive coaching. The names of the companies and people involved have been changed to protect the confidentiality of the coaching engagement and the privacy of the participants.

And finally, I will examine the path I may follow in the future, the internal consultant vs. an external professional coach in private practice.

Purpose of Thesis

The purpose of this thesis is to describe one person's journey transitioning from a corporate position in sales and marketing into professional coaching. I will discuss the coursework that led me on this journey to reinvent myself professionally, and describe the skills I learned at Penn and the experiences I had as a result that have enabled me to establish a professional coaching practice.

I will offer a gateway into my reflections and insights as I progressed through the Organizational Dynamics program and discuss the choices I made that made it possible for me to enter the field of executive coaching. The reader will have a clear understanding of the key elements of coaching and the path that

led me there. Those contemplating a similar path will be able to see the rigor of the Penn Organizational Dynamics program and the benefits of it. I tell my story in Chapter 2.

In Chapter 3, I discuss my need for change and the discord I felt in my life that predicated it. I present the stages of change and how change develops in an individual.

My theoretical and practical experiences as a coach are discussed in Chapter 4 with the introduction of the Wilkinsky Normative 9-step Coaching Model in DYNM 641, The Art and Science of Organizational Coaching (DYNM 641 Class Notes, Spring 2006), and my experiences using it coaching my first client. In Chapter 5, I develop my own coaching model and describe how the elements of that model are applied at work and in sports, and the strengths I drew on to create the model. In Chapter 6, I discuss practical applications of coaching professionally. I illustrate coaching in five environments; coaching undergraduates as they learn to become a team, coaching managers in a corporate environment, coaching as a consultant to a pharmaceutical company, coaching clients who are undergoing life changing career transitions, and coaching using LIFO® communication strategies in a government environment.

Finally, in Chapter 7, I offer conclusions and reflect upon my journey. I offer insights for readers who may wish to follow my path and include questions for readers to consider and exercises to start them on their own journey of self discovery. Then I outline my thoughts on my options as a coach for the future and where my work as a coach may take me.

CHAPTER 2

THE RATIONALE FOR CHANGE

For the longest time I have always wanted to pursue a graduate degree. My desire to attend graduate school was rooted in the strong influence toward education I received from my mother. She firmly believed that education equaled freedom and independence for a woman, and once attained, could never be rescinded. For me, it meant changing the direction of my life and doing the job that I wanted to do, free of the imposed obligations that my family expected of me. This represented the chance to use my strengths, to be at my best and to make a difference in the world and in the lives of others.

Before entering the Organizational Dynamics program, I was in sales and traveled extensively for business, so finding the right program to fit my needs continually eluded me. I initially thought that I would have to quit my job, sell my house, attend school fulltime, and take out student loans to achieve my goal. It was something I would have gladly done if I could get into a top flight school.

Being a sales person was never a job I wanted to do and I was not drawn to it. I did it out of the need to have a job early in my work life and inadvertently transitioned into it for the majority of my career. I learned to do the job well and enjoyed many elements of it including interacting with clients, understanding their needs, asking questions until I could uncover their root reasons for making a buying decision and consulting with them about the solutions that would best meet their needs. Overall, however, my heart really wasn’t in it and I tired of doing the same thing day after day while feeling like I was running in place.

I'm not the kind of sales person who would impose my will and push my product or service on a client because it was the company's mantra as some of my colleagues did. I was about meeting the customer's needs with the best product I could, making them happy with their decision to buy from me, and enjoying their repeat business from a position of trust and credibility. Trust and credibility are crucial to me because as a consultative sales person, these are the keys I relied on to obtain repeat business. In DYNM 626, Leading the Professional Service Organization, I learned that these were also two of the characteristics of a trusted advisor and I realized that I had acted as a trusted advisor for my customers. A common trait of a trusted advisor is one who "places a higher value on maintaining and preserving the relationship itself than on the outcomes of the current transaction… The advisor will make a substantial investment in the client before the relationship does, in fact, generate any income, let alone any profit" (Maister, Green & Galford, 2000, p13).

In sales, one of the best compliments I ever received was when one of my clients told me that I "always kept their best interests in mind and they knew that I would only make recommendations that would be beneficial to them and that was why they trusted me so much." As a trusted advisor, I identify with what Maister et al (2000) describe as the attributes of the advisor which have similar applications for the professional coach. A trusted advisor has "a predilection to focus on the client rather than on themself." The characteristics presented by Maister et al., 2000, have guided my thinking and describe how I approached a

sales opportunity. They have also served me well as I applied them when coaching a client.

Characteristics of the Trusted Advisor

- Enough self-confidence to listen without pre-judging
- Enough curiosity to inquire without supposing an answer
- Willingness to see the client as co-equal in a joint journey
- Enough ego strength to subordinate their own ego
- Focus on the client as an individual, not as a person fulfilling a role
- Show a strong "competitive" drive aimed not at competitors, but at constantly finding new ways to be of greater service to the client
- Are motivated more by an internalized drive to do the right thing than by their own organization's rewards or dynamics
- Believe that both selling and service are aspects of professionalism… proving to clients that you are dedicated to helping them with their issues (p13-14)

In DYNM 602, The Leader Manager as Coach, many discussions were held about the skills needed to fuel a successful coaching engagement. These skills were the same ones I had developed in sales. Coaches think about their client and what is best for them first and meet them in the moment when the client is ready to listen to alternatives, engage in the process and explore whether an intervention is right for them by trying out a new task and reviewing its degree of success. "Coaching moments, moments with the potential for learning, occur all the time… An employee has a question, a complaint, thinks out loud about a particular issue, or expresses concerns about a problem he or she is having… Coaching requires that the manager stop the action and instigate a dialog using techniques of inquiry" (Hunt & Weintraub, 2002, p25).

As I grew more discontented with sales, I sought out a professional coach to help me clarify my goals and work toward changing my career path. When I transitioned into the cable industry years before, I had a job where I felt excited to

get up in the morning and I wanted to feel that fulfillment and passion for work again. While attending a cable event, I discovered that the speaker was a career coach and I sought out her counsel.

When I Hired a Coach

Kathy Toomey became my first coach. She guided me through a series of activities that led me to conclude that human resources was the field that interested me most and would provide me with what I thought would be the quickest way to transition to a new job at a comparable salary to what I was making using the skills that I already had. I arrived at this decision by exploring a number of fields by talking to senior executives within those fields who had expert knowledge of what it takes to be successful in them. My coach connected me to them in an early version of networking before the advent of LinkedIn or Facebook. That set me on a path of self discovery and purposeful activities designed to fulfill my goal, and I approached each activity with relish believing that I would uncover where I would fit best in HR. I took the Professional in HR certification course at Villanova, joined the National and Philadelphia Chapter of the Society for Human Resource Management (SHRM), was recruited to be a Philadelphia SHRM board member, and worked at my transition to no avail. What I learned during this period was that transition is a journey and it has many stops and starts, some more unexpected than others. When I failed to change jobs after many months, I moved on to another coach and hired another who I thought would be better equipped to guide me further along the way.

My second coach, Donna Epson, was undergoing a career transition herself and was enrolled in the Penn Organizational Dynamics program. Donna's past included years of experience in HR and I thought that she would be able to give me insights into the field that I was seeking to enter. She thought that the Organizational Dynamics program would be a perfect fit for me, but I was just looking to make a career change that could be accomplished by a simple job change only to discover that it would take more than that to achieve my goal. I worked with her for over a year when she suggested that I go to a Penn information session, and since I felt we were 'out of things to do,' this suggestion was an action item that I could take and by then, I needed to act. I knew I couldn't stand still any longer.

I didn't anticipate that I'd apply, but as I listened to the speakers talk about the program, I thought to myself that the requirements were such that I had the qualifications and experience for admittance and I decided to apply without any expectation of being accepted. The goal clarification work I had done with my first coach proved to be helpful in preparing the required essays for Penn.

Four days after sending in my application, I was accepted. Having turned down Harvard after being invited to apply to the J.F.K. School of Government years before, I knew I had to take advantage of the opportunity to attend Penn, an Ivy League university considered one of the best universities in the world.

What I liked most about the Penn Organizational Dynamics program was that classes were taught using adult learning method and applied learning. Grades would be determined by writing papers about how I would apply my

learning instead of memorizing facts and taking tests, and that would play to my strengths.

My Learning Disability

Throughout my academic career, I have been saddled with an undiagnosed learning disability called dyslexia that I diagnosed in myself when I was 20 while in college during a developmental physiology class, but was only officially tested for it after my first graduate class at Penn in 2005.

Dyslexia has made learning arduous since I read very slowly while my mind races ahead with new thoughts and ideas. Reading makes me sleepy because I read each and every word and my eye jumps from one word to the next. I often re-read the same line in a paragraph over and over again, and then can't figure out why I don't comprehend what I read. I sub-vocalize when I read and I have no capacity to "skim" through a book. I either read it or I don't. A full page of text in a letter or email looks like an icon instead of words. For me, reading is like trying to drive a high performance race car uphill on a gravel road in a driving rainstorm while hail pelts against the windshield. It's exhausting.

In addition, I can't process vowels into sounds or match written letters to sound out words, and I can't express new ideas without thinking about them internally first because I can't find the right word to accurately articulate what I want to say. These are some of the typical characteristics of dyslexics and they made me feel stupid in school and I was treated that way.

Sally Shaywitz, M.D. has done research on how dyslexia appears in the brain using MRI's to get a visual picture of how a dyslexic's brain functions. She

has identified where the area of the brain is activated when reading takes place and the differences between a normal brain and one with dyslexia. She states that “most of the reading part of the brain is in the back called the posterior reading system. (There are) two different pathways for reading words… one for beginning reading, for slowly sounding out words, and another that is a speedier pathway for skilled reading” (Shaywitz, 2003, p78). There are three areas of the brain that light up on an MRI when reading. An area in the inferior frontal gyrus called Broca’s area is where articulation and word analysis occurs, the parieto-temporal region in the middle of the brain is used for word analysis, and the occipito-temporal area in the back of the brain are where words are formed. The first two areas are very slow to process words, and the third area is exceedingly fast and highly activated in good readers (Shaywitz, 2003, pp78-79).

The occipito-temporal area is the “hub where incoming information from sensory systems comes together and where relevant information (about) how (a word) looks, how it sounds, (and) what it means is bound together and stored” (Shaywitz, 2003, p79). After learning to read, good readers activate the occipito-temporal area in the back of the brain to create an express route in reading proficiency. Only the parieto-temporal region is activated in dyslexics. This region is slow and analytic, and “its function seems to be in the early stages of learning to read, initially analyzing a word and linking its letters to their sounds” (Shaywitz, 2003, p79). “Consequently, (dyslexics) have initial trouble analyzing words and transforming letters into sounds, and even as they mature, they remain slow and not fluent readers” (Shaywitz, 2003, p81).

For every disability there is a gift and there are things I do incredibly well. I am structured and process oriented and that helps me to process information, solve complex problems, create adaptations, and connect seemingly disparate things in ways others can't begin to imagine. I use these skills in my coaching to ask questions, suggest opportunities and open the doors of possibilities for my clients.

Once I study the material I want to learn, I get it. I remember information and can explain it to others in detail. When Three Mile Island had its accident, I drew a picture of a nuclear reactor and explained how it worked so others could understand what happened, all from memory, and this was just a topic I was interested in, not one I studied in school. Tests used to frustrate me because after they were over and I learned what all the answers were, it didn't count. Yet I learned the material but felt stupid because I wasn't "book smart."

After undergoing extensive testing for dyslexia, I received accommodations from Penn that included using a computerized reading program that allowed me to double my reading speed, increased my immediate comprehension and helped me remember what I'd read, even the next day. My learning was greatly enhanced and the papers I wrote acted to embed my learning to its application that I later used to put the new skills I had learned into practice.

My learning challenge has increased my sensitivity to coaching others particularly through difficult or challenging times. I have had many personal challenges due to my dyslexia without being able to attribute them to anything

prior to my diagnosis and therefore I simply persevered and created ways to adapt to any situation. I bring that skill and experience to my coaching. It allows me to understand to a greater degree the frustration my clients are expressing and enables me to ask good questions to get to the root of the issue. I know the frustration those times can present and I look for ways to acknowledge what my clients are experiencing and then create ways for them to progress toward achieving their goals in the most positive and productive way I can.

CHAPTER 3

PSYCHOLOGICAL FOUNDATIONS OF COACHING

There is disagreement “in the coaching literature about the relevance and importance of formal psychological training and experience” (Peltier, 2010, p.xxvii) for practicing executive coaches. Kauffman & Coutu’s “2009 Harvard study of coaching (as cited in Peltier, 2010) revealed that only 13% thought that psychological training was essential and nearly half thought it did not matter at all... and although coaches were hired to coach an executive with personal issues only 3% of the time, they found themselves coaching on personal issues 76% of the time.” Berglas (2002) believes that “executive coaches who lack rigorous psychological training do more harm than good” (as cited in Peltier, 2010, p.xxvii).

As a coach, I rely on the training I received in psychology as an undergraduate, and as I discuss in Chapter 5, I developed my coaching model based in large part on that background. If I define coaching as Peltier does, that coaching is “psychological skills and methods employed in a one-on-one relationship to help someone become a more effective manager or leader… and these skills are typically applied to specific present-moment work-related issues in a way that enables this client to incorporate them into his or her permanent management or leadership repertoire,” (Peltier, 2010, p.xxxi) then psychology plays a significant role in the way I coach people to achieve their goals.

In essence, coaches engage in behavior modification with their clients and to be able to successfully coach clients to change their behavior, I believe that it

is important to understand the underpinnings of sound psychological principles and the stages of change. The basis for behavior modification can be found in reinforcing actions and behavior that lead to change. After questioning a client about their issues and listening to their answers and rationale, the coach designs an intervention to give the client practice in developing new behaviors and reinforces the actions that lead to progress toward their goals. From Ruth Orenstein's work on Multidimensional Executive Coaching, the key points suggest that "using the most effective interventions for a specific client at any given moment during the coaching cycle is the coach's most important responsibility. Methods may range from straightforward behavioral change techniques to complex psychological interventions, depending on the client's awareness of the specific behavior and the intra-psychic or organizational factors that are precipitating it. The most prevalent coaching methods are drawn from the most widely accepted psychological traditions" (Orenstein, 2007, p105).

Orenstein grouped interventions into four methodologies, behavioral, cognitive, psychodynamic and organizational methods. A few examples of interventions from each method she outlined are listed below.

Behavioral Methods

- Behavioral Experimentation – Testing desired behaviors in the work setting.
- Modeling – Demonstrating the desired behaviors.
- Positive Reinforcement – Rewarding the desired behaviors when they occur.
- Visualization – Imagining oneself behaving in a desired manner.

Cognitive Methods

- Challenging negative thoughts – Examining the validity of thoughts that undermine positive change.
- Journaling – Writing about one's own experiences
- Positive self-talk – Talking to oneself in a way that supports desired change.
- Reframing – Thinking about an event or situation in a different way.

Psychodynamic Methods

- Exploring family of origin dynamics – Examining the parallels between the patterns in the client's family of origin and the patterns in the work setting.
- Identifying defense mechanisms – Pinpointing the characteristic manner in which the client protects himself/herself against anxiety.
- Identifying unconscious triggers – Making conscious the unconscious stimuli that result in ineffective responses.

Organizational Methods

- Dyadic – Examining interactional patterns between two individuals.
- Group – Examining the dynamics within a group.
- Intergroup – Examining the dynamics among groups.
- System-wide – Examining the dynamics within the system as a whole.

(Orenstein, 2007, pp105-106.)

While I was coaching a client from a state government agency, I used behavioral experimentation as an intervention for Steve, whose long term goal was to become the executive director of his organization. He realized that he would not achieve his goal overnight and he was willing to work on it but didn't know what to do next after he didn't get the job he interviewed for. When I met him, he had taken a different job to prepare himself for his target job and to

acquire broader experience that he didn't have, but he was at a loss as to what to do next. He reported that a new executive to the organization, Anne, got the job he wanted having been moved into it from a position in HR, a move that astonished him.

I asked Steve if he knew Anne and he didn't. We talked about how he could learn more about the job she got and what experience she had that he might need so I asked him if he had networked with her. He seemed surprised saying that he never considered doing so. I asked if he ever attended meetings with Anne when he might have the opportunity to talk with her casually, perhaps before the meeting, suggesting that this would be a step he could take to make a professional "friend" by networking and if he could see himself doing this. He said he could, and by doing so Steve used visualization, another behavioral intervention method.

Since Anne was new to the organization and to her job, I asked him if there were things Steve knew that he could tell her to make her more effective in her position. In return, she could share information with him about her background and what it takes to get the job he wanted so he can be successful next time. By using the cognitive method of reframing how networking could be used in a positive way, Steve agreed that it made sense and he would look for opportunities to talk with Anne on an impromptu basis. He could visualize getting to know her enough to feel comfortable asking her to have coffee with him to network and he understood how important it might be to share information with others. This was a difficult step for Steve because he had never done it before or

recognized its value, but he reported that he had talked with Anne and began the process of getting to know her. He felt this action was valuable in advancing him toward his goal. It is important to have clients accomplish a first goal in a low risk situation because an intervention pushes the client outside their comfort zone. They may resist because they may feel uncomfortable, but it is doable because there is less pressure and if they fail, there is less at stake. As noted by Orenstein (2007),

> Interventions are designed for the client within the organization at a specific point in time, but continuous consideration is given to the fact that once change begins to occur, the nature of subsequent interventions must also change. Hence, coaching becomes a highly demanding process that must be based on not only assessment data but also behaviors that arise during the course of the coaching. Ongoing assessment and the need for continuous scrutiny and self-scrutiny is thus vital (p36).

<u>The Stages of Change</u>

There are six stages of change (Peltier, 2010, p2) that provide “common principles that can reveal the structure of change, especially intentional change, in human behavior” (Peltier, 2010, p2). For coaching to be truly successful, the client must want to change in order for the change to be effective and long lasting. “When a client engages in coaching for any other reason than to change his/her own behavior, coaching will fail. Some of these reasons are to appease someone else, to prove that someone else is to blame, or to gain status or attention” (Orenstein, 2007, p144). The client may make superficial changes at the request

of their supervisor in order to keep their job or they may decide that the organization is not a good fit for them and resign, but ultimately, the coaching will fail (Orenstein, 2010, class 6 notes).

Peltier (2006) in The Psychology of Executive Coaching offers six stages of client change:

1. Precontemplation – In this stage, a person has no intention of changing and may not perceive that there is a problem. Although others may think that something is wrong or needs attention, the person does not.
2. Contemplation – At this stage the person becomes aware that a problem exists. They are thinking seriously about making a change, but have made no commitment and have taken no action.
3. Preparation – At this stage there is a commitment to change and plans are made to accomplish it. Goals are set.
4. Action – The plan is put into effect and change is made. Clients behave differently than they have in the past. This stage can be uncomfortable. Goals are assessed.
5. Maintenance – Changes are consolidated and reinforced. Relapses are corrected.
6. Termination – Changes become normal and are seen as a natural part of one's identity. It feels as if it has always been this way, and the old behavior holds no interest.

On my journey to becoming a professional coach, I experienced each of these six stages. When my transition began, I was working for a corporation as a

sales manager with several people reporting to me. I had spent my career in sales and marketing and had worked in the manufacturing, broadcasting and telecommunications industries, advancing from an individual contributor to a district sales manager responsible for selling marketing campaigns to my customers and managing my team of sales trainers. While I enjoyed coaching my trainers and watching them grow in their jobs, I was working to get promoted into the marketing group at headquarters, the next level in my then current life path. I wasn't thinking that there might be something else I would rather be doing that perhaps I would be much better at and enjoy more. I was in the precontemplation stage and I kept working to be the best I could be in my job and demonstrate that I could handle more responsibility. Throughout my sales career, I was always one of the top performers and won sales awards whenever incentives were offered. I worked hard and went above and beyond what was required of the position and I thought I was on track to attain the next promotion. If anyone thought that I didn't possess the skills necessary for promotion, they didn't tell me and I wasn't aware of anything that would impede my progress to the next level.

When I interviewed for a promotion into marketing, my vice president said, "We want you to be in marketing, so go show them what you can do." I was encouraged by his comment because I had created a marketing piece for the customers in my region that had been recognized as a best practice several months before. Corporate marketing was charged with taking my work and developing glossy new promotional pieces in the format I had created and

collaborated with me on its content before rolling it out across the company, so I knew that I could do the job. Since I wasn't promoted when I thought I should have been, I began to wonder if I was a good fit for the company and pondered what else I could do. In this contemplation stage, I decided that I needed help and couldn't figure out which direction I should take on my own so I hired an executive coach to help me lay out my plan.

My coach led me through a series of self exploratory questions and exercises that helped me to clarify my goals. Next, I began to investigate the industries and jobs that interested me by talking with senior executives from many different types of companies who led the departments I was interested in to determine the knowledge, skills and abilities I would need to enter the field at a salary level commensurate with what I was currently making. As I talked with each executive, I was able to refine my plan and focus my energies during this preparation stage. I was disappointed at one point when I learned that the skill set I would need for a job I thought I wanted to do was something that I knew I hated, and my coach said, "Good! Keep going, you're on the right track. That just means that job wasn't for you."

One of the important learnings of my personal coaching was that if I wanted change, I had to take action. Change is not passive and no one would offer me the job of my dreams without my initiating an action to obtain the skills that would allow me to transition into another field. When I found the Penn Organizational Dynamics program I was excited about the field of study, the knowledge I would acquire and the new skills I would develop. I was even more

enthusiastic when I was immersed in the richness of the classroom activities and exposed to the contributions of my classmates and the breath of experiences they added to each class as we discussed case studies, models, business situations and worked on projects together. My action stage was underway.

It was through the Penn program, and especially the coaching concentration, that I participated in coaching experiences both in class and as extracurricular activities that strengthened my skill set and prepared me for becoming a professional coach. During this maintenance stage, I decided to augment my academic studies with activities that would reinforce my learning. I joined the Penn Coaching Advisory Board, took an independent study coaching practicum, and accepted a position as a teaching assistant and team coach to an undergraduate class studying group development theory while taking a concentration of coaching courses that prepared me with the theory and experience to coach professionally, even before graduation. While at Penn, I experienced my highest level of academic success after years of frustration due to my undiagnosed dyslexia.

I have no interest in returning to sales and marketing, not even as a fall back plan. In this final termination stage where change becomes normal, I can not imagine doing anything else but coaching.

CHAPTER 4

THE PRINCIPLES OF COACHING

My first formal introduction to coaching came when I took the Art and Science of Organizational Coaching, DYNM 641 with Dr. Bill Wilkinsky. Bill asked members of the class to decide whether we wanted to be a coach or a client and to pair up for the duration of the semester. Having been exposed to three coaches up to that point, I knew immediately that I wanted to be a coach. I have coached athletes and direct reports at work and I love watching people learn, grow and develop new skills. This was my opportunity to participate in a structured, supervised experience where both my client and I could learn and apply the coaching concepts we were studying.

My First Coaching Client

Tamika Lee was a highly successful telecommunications executive who was trained as an engineer and has held many positions during her 25 year career including engineering, marketing, product management and network planning jobs. Tamika decided to become a client because she felt her work as the product manager had become routine and boring. She wanted to recapture the passion and enthusiasm she once had for her work. Ideally, she wanted to be promoted but she would have to move to New Jersey and she decided that she would not do that with one son still in high school. If she stayed with her company just five more years, she would get a big bump in her pension financially, could retire and then do whatever she wanted without having to worry about a job with a big salary. What she really wanted to do was create modules

about leadership and self esteem and conduct seminars with young at-risk boys at local organizations such as The Boys & Girls Clubs, but she didn't know that when we began her coaching.

Her quandary was that she didn't have goal clarity or an idea as to how she should go about making her desire a reality and she knew it. Tamika did have two initial objectives. She wanted to have a coach help her draw out ideas, steps and processes that she could not do on her own, and then have help in thinking through an action plan that she could execute as a result.

I felt I could be valuable to Tamika as her coach because I had personally experienced the coaching process and I was successful as a result. After having had three coaches, each with a different approach, I felt I could facilitate a positive experience for Tamika. I am a good listener, supportive and can ask questions to get her to begin to consider new possibilities that she hadn't considered. As she talked, ideas and questions began to emerge.

The Wilkinsky 9-Step Process of Coaching

In class, Bill introduced us to his Normative 9-Step Coaching model, (Wilkinsky, 2006, classroom notes) which Tamika and I employed during our coaching experience together (see Table 1). The model outlines the steps of the coaching process divided into three areas. First is "Getting Started" which is defined as engaging the client, getting to know each other and setting a preliminary goal. Second is "Data Management" which includes establishing a data plan, gathering and analyzing data and delivering feedback. The third area is called "Results" and includes writing an action plan, implementing the coaching

sessions and disengaging from the coaching client.

Table 1. The Wilkinsky Normative 9-Step Coaching Process

Wilkinsky Normative 9-Step Coaching Process	
Getting Started	1. Call/Engage
	2. Get to know
	3. Ask client to set preliminary goals. Important to narrow focus to: • Behavioral goal • Intellectual pursuit
Data Management	4. Establish the Data Plan
	5. Gather data. Analyze data
	6. Feedback • Plan • Deliver • Reactions
Results	7. Action Plan
	8. Implement / Support Role
	9. Begin to Disengage

Tamika and I didn't know each other prior to meeting in class. Once we agreed to work together, we had an introductory meeting to get to know each other and lay out our plans. I learned that my client was a very caring person and had a passion for working with at risk youth, especially teenage boys. Tamika believed that young boys were not getting the guidance they needed to establish goals, have big dreams and hope for the future and she worried that

they would go down the path of criminality if no one interceded. She has two teenage sons and had experience raising boys. Initially, her vision of the future was to work as a community volunteer at a local non-profit organization creating seminars on leadership and self esteem for at-risk teenage boys after she retired. My goal was to find ways to help her see the possibilities that desire would create, open up her thinking to the kinds of things she might consider and then let her determine what she thought would be best for her. I also wondered if there was a way to merge her immediate job goal with her vision of the future. My job was to ask the right questions at the right time during the process.

We began by having Tamika set her preliminary goals. Tamika stated her initial goal as follows:

> Work has become routine and predictable. Therefore, the client lacks motivation. The client wants to recapture the passion and enthusiasm in her work, either inside her current company or through her love of community volunteer efforts as a member of a non-profit board. She feels the stress of work-life activities are out of balance and wants to determine where to place her energies for greatest fulfillment and satisfaction. (O'Connor, 2006, Appendix A.)

We agreed that the goal could be amended to reflect any changes that occurred later as Tamika clarified her goal based on new discoveries, it would change as it crystallized. We decided to meet for an hour per week outside of class or work time and we scheduled our meetings via telephone in the evenings. I introduced a coaching form (Fuimano, 2006, Appendix B) that I found useful when I was being coached to help me organize what I wanted to get out of my coaching sessions and Tamika agreed it would also benefit her.

Next we determined what metrics we wanted to use and agreed that I would interview Tamika's colleagues and then follow up and provide them with the LIFO® descriptor questionnaire (Appendix C) under favorable conditions. Tamika would also take the LIFO® survey, a behaviorally oriented, non-judgmental assessment tool that would allow us to identify Tamika's communication styles and preferences for how she approached work. Tamika provided performance reviews and took two additional assessments to determine if there was anything in the tests that would reveal a strong interest we were not aware of that we should consider. As the coach, I wrote the contract, but we wrote the questions I would use in the interviewing process together. We decided in which order I should ask them and I referred to the question list during my interviews. Our coaching sessions together began before we started to gather data and officially ended before it was complete, but we continued our dialog and scheduled additional meetings to review my interviewing results and for me to provide feedback. We discussed the assessment results as part of our sessions together. Tamika was charged with writing the action plan after our data feedback session and we met again to wrap up our coaching experience and disengage.

Coaching Using LIFO®

One of the tools taught in DYNM641 that Tamika and I decided to use was LIFO®, "an applied behavioral science system which fosters high performance for individuals and teams… it improves productivity, interpersonal communication, and collaborative teamwork" (Atkins, 2004, p1). The methodology has four styles,

supporting-giving, controlling-taking, conserving-holding and adapting-dealing, and these styles operate under favorable and unfavorable (stressful) conditions. When a person uses their strengths just enough they are productive. When they overuse their strengths they are said to be in excess, and when they underuse them they are in a blind spot and can miss cues that may be important in the work they are doing for a positive outcome.

One can tell which style a person is using by what people say, do, write and ask. People using the supporting-giving style value excellence and their goals are to be helpful and prove their worth. Controlling-taking people value action and their goals are to be competent and get results. Those who are conserving-holding value reason and their goals are to go slow and be sure. Finally, the adapting-dealing people value harmony and their goals are to know people and get along.

Table 2 outlines the behaviors that are strengths of each style followed by behaviors that signal excess called thresholds, and finally the behaviors that a person demonstrates when they are in excess.

Table 2. LIFO® Strength to Excess Chart by Style

Style	Strength	Threshold	Excess
Supporting-Giving	Thoughtful	Indulging	Self-Denying
Supporting-Giving	Idealistic	Impractical	Utopian
Supporting-Giving	Loyal	Devoted	Blindly Allegiant
Supporting-Giving	Trusting	Guileless	Gullible
Supporting-Giving	Modest	Deferring	Self-Effacing
Controlling-Taking	Directing	Bossy	Domineering
Controlling-Taking	Quick To Act	Hasty	Impulsive
Controlling-Taking	Confident	Cocky	Arrogant
Controlling-Taking	Forceful	Insistent	Coercive
Controlling-Taking	Competitive	Contentious	Combative
Conserving-Holding	Tenacious	Unyielding	Stubborn
Conserving-Holding	Reserved	Aloof	Withdrawn
Conserving-Holding	Methodical	Painstaking	Plodding
Conserving-Holding	Factual	Concrete	Data-Bound
Conserving-Holding	Practical	Utilitarian	Unimaginative
Adapting-Dealing	Tactful	Solicitous	Placing
Adapting-Dealing	Humorous	Silly	Foolish
Adapting-Dealing	Negotiating	Vacillating	Yielding
Adapting-Dealing	Flexible	Impressionable	Acquiescent
Adapting-Dealing	Enthusiastic	Excitable	Fervent

© 1981, The Name of Your Game, by Stuart Atkins, Ph.D., pp64-65.

The value of LIFO® is that since it is behaviorally based, the styles a person uses are easy to identify because they are observable behaviors. People often use a combination of styles with some more dominant or “most preferred.” Often, the most preferred styles change under unfavorable conditions. Tamika and I decided to use the LIFO® survey to assess which styles she was using and how she impacted others around her.

The Coaching Sessions

During our sessions together, Tamika talked about her work, the structure of her organization and about having a difficult boss who treated her team with disrespect. Tamika found that draining and it left her with little energy or

enthusiasm for work. We had a break-through moment when Tamika realized that her boss was controlling-taking as defined by LIFO® standards and she was reacting to her with a conserving-holding orientation, a combination that was doomed because these styles are at odds with each other. Tamika related that when she began to just give her boss the high points, things began to go more smoothly, Tamika felt less pressured and both she and her boss were happier.

Tamika enjoyed the work she was doing, but it just was not as engaging as it once was and it was not enough. She was going through routine motions of the job. We explored the possibility of how she could be promoted and Tamika explained that she would have to move to northern New Jersey and she was not willing to do that. The company had re-organized and the new CEO decided that all director level jobs that Tamika would be suited for would be based there. Tamika also thought about leaving the company and decided against it, but if offered a severance package she would jump at it. A separation package would provide the same financial security that working for the next five years would and Tamika could move on to do the community work she was so passionate about.

I asked what work might look like if she were able to combine her love of community with her work on the job. I wanted to help her to envision being in a completely great job and loving it. What would bring her joy? What would give her a deep sense of fulfillment and satisfaction? Who would be involved? Those questions excited her and she said she had just met someone she has known for a long time, Logan Mailer, in the elevator. Logan was in charge of the Community External Affairs department. I asked if she thought to ask him to

lunch to talk about his group and the possibilities it might hold for her. We talked about what she might want to find out from him, how his group operated, what opening might come up and for Tamika to express an interest to Logan about her goals. She called him the following week, and unable to schedule lunch with him, got a phone interview where she was able to find out key information that led her to decide that joining his group or combining her community activities with her work activities was not what she wanted to do because she didn't want company policy to dictate which projects she would be allowed to do with youth groups. Instead, Tamika decided that she wanted the freedom to listen to the needs of her community and customize a program that would meet their needs. This was a good start and a key decision point for Tamika.

This chance meeting spurred our conversation about the importance of having a "30-second elevator speech" that briefly tells others about her goals so that she could discover what opportunities might be open to her when talking to others, especially to those she doesn't know or would never suspect would have information that would be useful to her. She agreed that having a 30-second elevator speech would be a good idea so that she would have a comfortable way to approach talking about what was important to her with others. I provided a worksheet (Dunn, 2006, Appendix D) to help facilitate her thoughts on what she might want to include in her elevator speech. In later sessions we discussed what she created. I had her role play, telling me what she would say. I tuned out almost immediately as she provided detailed background as to why she thought she could do the job and I knew that people would not be listening when she

finally got to the point. I asked her what would happen if she put the point first. She played with it saying it different ways. The problem was in her delivery because she was writing it and then *reading it*, not saying it with the enthusiasm she felt. After listening to her, I reframed and summarized her words back to her providing an example of what she might say. She got excited because now she could hear the difference! She agreed to work on it some more and the results were striking.

One of Tamika's direct reports told me during the interview that he had been unhappy at work until Tamika became his boss. His mentor told him not to despair because if one waited long enough, bad situations change and good ones don't last. Nothing could have been more prophetic because during session seven Tamika learned that her company had re-organized once again and the controlling-taking boss and her boss were gone! When Tamika found out who the new director and VP were, she and her team were thrilled. She had long standing relationships with both and felt comfortable with them. She took the initiative to introduce her team to the new VP during a team meeting in Philadelphia and many team members told me how much that meant to them.

Client Feedback

The interviewing process took a month to complete, longer than I had expected, but everyone ultimately participated. That resulted in my not having data from the interviews to share earlier in the process during our coaching sessions. I don't believe that truly hindered us in any way since Tamika's goal changed to a non-work goal early in the process. We did the feedback session

immediately after I had all the results from the participants. We were both interested in what the participants said and whether their comments were consistent and made sense to Tamika. I told Tamika to receive the feedback with an open mind and determine if she heard anything surprising or that she could learn from without passing judgment on it and then we would discuss it.

Tamika felt that what people said was consistent and not surprising to her. We used the feedback to determine how the participants viewed Tamika as a leader, colleague and teammate. Tamika felt that their comments were on target and was only surprised by her boss' comment that courage and accountability were her boss' two biggest values and that Tamika had both. Her boss also thought Tamika should push back more because she is a smart woman who would come to the right conclusion. She thought Tamika should push for her opinion more and take initiative. She didn't need to know what process Tamika took to get the answer; she just needed to know the answer and Tamika didn't have to justify it. Some of Tamika's colleagues and team members thought that Tamika should also push back and Tamika responded by saying that she felt they gave her credit for having more power than she actually had. Tamika realized that she was not communicating as effectively as she could because she was pushing back and they didn't know it. They were only hearing the results of Tamika's actions with her boss in what they were being asked to do, not the behind the scenes negotiations. Her team also expressed a desire for more cross team communication since they were all in different locations, and they needed to hear 'the why' behind what they are being asked to do. The team

thought they could be more productive if they understood the rationale. After our feedback session, Tamika asked the team what they needed from her without referencing our session. Afterward, she reported that she realized she had been making assumptions for the good of the group without asking them what they really needed from her. She thought that they needed to get together to focus on how their projects fit together when what they really wanted was to hear Tamika explain the strategy behind what they were being asked to do. As a result, Tamika told the team that going forward project reporting would be dropped from the meeting to allow time for her to report strategy and to give them time to ask questions. Tamika and her team agreed they were much happier with this approach.

Data Gathering

From the assessments that Tamika took, she felt that they confirmed her aptitude for community volunteer work and motivating others. It suggested that she had an aptitude for teaching, developing human skills, engineering, gathering facts and writing reports, supervision and instruction, sales, consulting and business services and creative entertainment involving imagination and spontaneity. All of these areas will serve her well in the pursuit of her goal.

Tamika asked seven people including her manager and direct reports to provide feedback using LIFO® descriptors under favorable conditions and the results revealed the following data.

- 6 people thought Tamika was cooperative and helpful
- 5 people said she was adaptable, considerate, empathetic, loyal, sociable and steadfast

- half said she was supporting-giving
- more than a third said she was adapting-dealing
- one thought she was conserving-holding

Tamika also took the LIFO® survey and we reviewed its findings. It revealed that supporting-giving was her most preferred style followed by conserving-holding, and that she also blended controlling-taking and adapting-dealing styles into her style mix as needed, so this result was consistent with what we would expect.

Tamika performed well at work and her team liked and respected her. They thought she was knowledgeable and supportive, and one even said that going to work was enjoyable again. That is a tribute to Tamika's skill as a leader and that will serve her well in implementing her goals for the future.

The Action Plan

Tamika wrote an action plan based on the work she did in defining her goal. At one point early in the process, she seemed stumped as to where she wanted to take her plan so I asked her to simply start by writing down what her dream job would look like and to ignore all the obstacles that could get in the way of her vision such as funding, her qualifications and job requirements or how she would do it. I just wanted her to dream her dream so she could see what it could look like. She started to think about what she really wanted and realized that in order to achieve her goal she had to do some things that she admitted she really didn't want to do. When I challenged her to act she was successful. She began planning the steps she could take to reach her goal and overcome any obstacles one step at a time. I was excited for her as she began taking these steps, being

willing to change the way she thought about what she wanted and the depth of the action plan she was able to write after she attained goal clarity.

Follow Up

Tamika decided to begin acting on her plan right away. She began to investigate volunteering at a local organization and selected several to research to determine which one would be the best fit for her. She planned to do field research while there by interacting with teenagers and staff to determine what their needs were and how she might best deliver the programs she had envisioned. She started to write her modules and had a list of twelve topics she planned to talk with teenagers about to gage their interest in learning more about them.

Client Evaluation

Tamika and I met to conclude the process and begin to disengage. I enjoyed coaching Tamika and watching her discover new things about herself and uncovering opportunities. Tamika said that she enjoyed the process and that she benefited from our time together. As a result of my coaching, she changed her goal to finding a way to integrate her work life with building her community volunteerism and was considering establishing a business outside of her work life. She said that I helped her to open her mind to possibilities that she never considered.

For example, initially she thought she would volunteer her time and create modules about self esteem and developing a dream so that teenage boys would have hope and goals for their future. She thought that she could have a small

group discussion with teenage boys to show them how to develop their talents, set goals and become achievers. I asked questions about her strategy for this goal. Would it be a business? Where will you run your business from? Do you want to be president of your own firm? Who are some of the organizations you would target? Do you want to do this inside or outside your company? What have you observed in the community that would encourage you to talk with a particular organization about your idea? Why would they listen? What resources do they have or need from you? How do boys communicate differently than girls and how does that affect how you would create your modules?

Summary

Two results have emerged as a result of the coaching process. First, Tamika learned how her communication style was not as effective as it could be. Her long winded tendency and lack of succinctness caused others to lose sight of her point so she didn't come across as confidently as she could. Other people trusted her and believed in her so she didn't need to justify her actions. Being able to get to the point allowed others to see her as the confident, competent person that she was and this positive change began to show up at work with her controlling-taking boss before the re-organization. It will serve her well as she pursues her goals as well as in her daily communication with others.

The second result of the coaching process was that Tamika determined that she didn't want to combine her community work with her job at work. While she originally thought that she would volunteer after retirement, she is now thinking about how she could begin to do the things that she loves to do right now that will

grow into a fulltime pursuit in the next five years. She has written an action plan that will enable her to begin to build her dream while still working. She knows she doesn't want to find a job at a non-profit organization or be president of such a firm, and that she would rather provide services to it as a consultant. Her focus is on children not money, so she has not fully accepted that she can create a business where she could generate income, but she is starting to consider how she can make that happen. Tamika wants to be a positive influence in the lives of teenagers, especially boys, by interacting and conversing with them and listening to what they have to say. She created a list of the modules she would like to present and her action plan calls for her to go out into the community to talk about what she has to offer. She created her timeline and has planned for this endeavor financially. She was excited in the knowledge that her plan was a journey into her soul to create a life that would be deeply fulfilling to her. She was passionate about influencing teenagers to dream big dreams, set goals, act with confidence and realize that success and achievement could be theirs if they believed in themselves and let her guide them along the way for a time.

Self Reflection

I enjoyed being Tamika's coach immensely because I love inspiring people to be more than they thought they could be. I care about people and I cared about Tamika. I am a coach who likes to challenge clients to do things that push them out of their comfort zone. I think that it is part of my responsibility as a coach to help my client expand their self-awareness and to create a safe space to explore the possibilities and opportunities that this type of experience presents.

For example, Tamika told me that initially she thought being a client meant just talking and not doing anything so when I asked her to interview Logan Mailer she was horrified. “What, me act?!” she said, “oh no!” She overcame her fear and did it anyway and that led to a key decision point that affected the direction and outcome of her goal. That single action led to goal clarity for her. As her coach, I am not tied to any one idea or to the outcome of the coaching. I won’t make a client do anything, but I will prod them along with suggestions, questions and encouragement. My role was to listen, to offer ideas and suggestions she could try, to encourage her to try what appealed to her and to accept the decisions she made as ones that were right for her. I was excited for her because I could see that she was in a place where she knew what she wanted to do and believed that she could do it. When I saw her recently, she was happy pursuing her goal.

I thought I preferred to coach in an organizational setting, but this experience taught me that I also enjoyed coaching individuals and to consider what I could accomplish as a consultant.

CHAPTER 5

DEVELOPING MY COACHING MODEL

Developing my coaching model forced me to think about how I coach and what I draw on to coach others to affect the kind of positive change in their lives that my clients are seeking. In DYNM 602, The Leader Manager as Coach, I developed my model based on the developmental coaching model (Hunt & Weintraub, 2002, p20) since I have had young sales teams who have needed guidance to learn and grow.

"Increase your effectiveness as a leader by helping others to develop and grow" (Landsberg, 2003, p.x) encapsulates my coaching philosophy perfectly. For years, I had managed others without being given any formal training by my company on how to supervise them and since the time that I began managing people, I have searched for the best methods to help people develop their skills, achieve their goals and be productive members of our organization. I had never been exposed to coaching models at work prior to my Penn studies, so my experience with coaching others had been modeled on a combination of my coaching athletes, my experiences with past managers both good and bad and on my background in psychology as an undergraduate.

The Influence of Athletic Coaching

As an athletic coach, I would explain to a group of athletes what was expected of them, explain the strategy, demonstrate the skill I wanted them to learn and then have them practice it. As an accomplished athlete, I knew the intricacies of the game, the skills required at each position and I was effective in

teaching people the skills they needed to consistently produce outstanding performance. I used different techniques depending on the skill levels of the athletes, in much the same way I would in organizational coaching. In basketball for example, I would “guard” the athlete as she shot the ball from various places on the floor as I stood in front of her with my back to the basket and predict whether the ball would go in or not while it was still in flight, and I would be right. The players would be amazed, but it is simply a matter of knowing what I was looking for in them. I know now that I was meeting them where they were, observing them and building on their skills to help make them successful (Russo, 2006, class 4 notes).

Sometimes I would help an athlete correct shooting errors through what appeared to be unconventional coaching. I would ask to see the fingers of their shooting hand palm up and I would run my fingernail over the top of their middle finger from the first metatarsal to their fingertip. Then I would ask if they felt it tingle where I had touched them. When they said yes, I would say, “That is the part of the finger that has to feel the ball when shooting and guide it toward the net.” This ‘in the moment coaching’ produced an opportunity for them to observe their shot, receive feedback and practice their technique (Russo, 2006, class 1 notes).

At other times, I would describe what I wanted them to do and let them practice executing the skill on their own. My favorite technique though, was to ask a player to watch me and do what I did as I did it, as if they were seeing themself in a mirror so they could learn what the correct skill felt and looked like

(Hunt & Weintraub, 2002, pp109-110). That is important in building a reflex arc in the muscles that acts as “muscle memory.” This means that if they were learning how to swing a baseball bat and were right handed, I would have to do it left handed to appear correctly as their mirror. They would have to mirror my moves to teach their body how to perform the skill and build their reflex arc, which, when performed correctly during play, is done without thinking about it.

While teaching someone how to do this movement, I was unconsciously learning how to do it left handed, just as they were learning the skill, too. This gave me empathy for what they were experiencing and it gave me an internal mechanism for gauging their learning, since I too, was learning. Coaching this way was a successful model for me and since I produced winning teams, applying that to business seemed like a natural to me so I carried that forward to work.

The Influence of Past Managers

As stated above, I have worked with managers both good and bad and it provided my next experience in understanding how to lead and coach others. My work relationships with those reporting to me helped me to hone my coaching skills. I have had young people reporting to me, some with experience in their position and some transitioning from other fields. Since I have done the jobs of the people I have managed, just as in sports, I knew their jobs, figured out how to accomplish the tasks of the job and worked around any obstacles that arose to produce effective results, so I felt comfortable in coaching them about what I knew and adding to it methods I learned from past managers I admired.

Utilizing what I liked most from past managers made sense to me and I hoped it would be as valuable to my direct reports as it had been to me. One activity that I especially liked made me feel so valuable as an employee, that it formed the basis for how I have been creating a coach friendly environment with my teams ever since, whether I have one person reporting to me or several. A coach friendly environment is one in which “both the manager and the employees create a context that makes learning possible. They must feel comfortable discussing issues openly and freely, with an eye toward learning” (Hunt & Weintraub, 2002, p72).

When I worked at All Movie Network (AMN), a programming organization that provides programming content to cable and satellite companies, my boss Kevin Davidson used to hold his formal, regular team meetings and individual meetings with us in the office and then occasionally, at random, round up whoever was in the office on a particular day and take us out to lunch. It was always a treat for us because we were so busy we rarely got out of the office to eat or socialize together and so the act of treating us made us feel valued. Listening to our opinions in that environment and allowing us to act on them later also made us feel valued. As a group, we shared many of the same client companies but called on different locations, so being able to get together and talk about what we were able to accomplish with our accounts and learn what other team members were doing was an invaluable resource for generating new ideas.

I enjoyed these sessions immensely and looking back, I realize that my boss gained greater insights into what we were doing in the relaxed atmosphere

of a restaurant than he ever could in an office setting. He used those sessions to facilitate knowledge sharing among team members to increase our effectiveness at the point of sale. He also learned more about us as people, our approaches to work and to our clients, and got a better sense of our overall account strategy and management capabilities. I always left those lunches excited about returning to work and the new possibilities I could develop from what I had just heard, armed with current information from which to write implementable action steps.

Much to Kevin's credit, the information exchanged in these informal sessions never appeared on our performance reviews and I carried that forward with my own direct reports. It never occurred to me that a manager would use developmental coaching sessions like this in a negative way to evaluate our performance. Based on my learnings in DYNM 602, it has been my experience that managers using information learned in this way would de-motivate people, promote mistrust and fear and that would result in a loss of credibility for the manager and their reputation (Russo, 2006, DYNM 602 class notes). Those are not traits that I want to see in anyone, nor would I want to work for someone who behaved that way.

I believe that a truly good leader and coach leads from a position of strength, models the behaviors that they would like to see in their people and promotes teamwork, collaboration, achievement and excellence. After reading "Now, Discover Your Strengths" (Buckingham & Clifton, 2001, p148) several years ago, I began to focus on the strengths of my people so I could coach them to higher levels of performance through positive reinforcement and capitalize on

their natural talents (Spreitzer, Dutton, Quinn, Heaphy, & Barker 2005, pp 75 – 80). This is particularly true when I have an option of who to assign to a project. I will look for the person that would truly enjoy the work and excel at it for the joy of doing it. I agree with the authors that we should utilize our strengths and find ways to manage our weaknesses so that they don't interfere with excellent performance (Buckingham & Clifton, 2001, p148). By doing more of what we love to do and are good at, we are engaged and productive people. As a manager, consciously creating a working environment that allows people to do what they love means that I can concentrate on helping people achieve rather than micromanage them or worry about retaining them (Berglas, 2006, pp105 – 112).

When I became a manager, I instituted lunch sessions with my team as a means of sharing, learning and building camaraderie. In our business, people were always stressed and never had the time to stop and think. We just had time to act, and that is not conducive to creativity or innovative problem solving. I made it clear to my team that these coaching sessions were developmental learning experiences and a safe place to ask questions, make suggestions or pitch an idea without fear of criticism by myself or others. I can lead by asking 'what if' questions that helps to stimulate ideas and possibilities. Team members can then incorporate these ideas into their plans and request resources to carry them out. What stayed with me most was the day when I did this for the first time and one of my reports, surprised that I would treat the team to lunch commented, "wow, someone who treats us like real people," made such an impression on me

because it was then that I knew that my team valued this activity as much as I did and I continue to do it to this day knowing how much we have all benefited from it.

Coaching as a Corporate Manager

As a manager, I like to guide people toward doing a good job, not just tell them what the answers are. I have used this successfully since my days as a teacher when I learned the three methods of teaching; command, guided discovery and problem solving. There are times when the command method is very useful. When time is short, demands are high, people are new and they just need to learn what to do, it is the quickest way to learn, but it is not my preferred way of teaching or coaching.

The skill / will matrix (Landsberg, 2003, p55) in Table 3 speaks to this, but I don't think it goes far enough. I would add an element to reflect how it changes when people work under pressure, particularly under the stress of short time deadlines as we did in my corporate sales job when we were only in the office on Monday and had to prepare all the work we would implement the rest of that week. In the original matrix, below, people are directed when they have both low will and low skill.

Table 3. Original Skill / Will Matrix

HIGH WILL	GUIDE	DELEGATE
LOW WILL	DIRECT	EXCITE
	LOW SKILL	**HIGH SKILL**

© Landsberg, The TAO of Coaching, p55.

When there is a need to accomplish the task quickly, whether a person knows how or not, it is my experience that stress trumps will because the job has to be done quickly. The motivation for doing the job is already there. People with low skill and high stress, particularly time pressure, need to be directed in order to learn what they need to do to accomplish the task on time the first time, whereas people with low skill and low stress can be guided to an assortment of correct solutions.

In the modified matrix in Table 4 (Adapted from The TAO of Coaching), based on my observations and experience in high stress situations, people with low stress and high skill have to be inspired to keep them engaged in the job and encouraged to produce work they can put their mark on in a way only they can. And finally, those under high stress who have high skill can be delegated the task as they have the ability to do the job.

Table 4. Modified Skill / Stress Matrix

LOW STRESS	GUIDE	INSPIRE
HIGH STRESS	DIRECT	DELEGATE
	LOW SKILL	**HIGH SKILL**

In the original skill/will matrix, schools typically direct us to one right answer and I think, in so doing, they do a disservice to all of us. It robs us of our ability to think and create a unique, viable and customizable solution from a list of options that are actually available to us. My philosophy is that there are many right answers, not just the ones the teacher or manager thinks are the right ones, and that is what makes guided discovery so powerful. It encourages creativity and often, people will come up with an answer that I didn't think of and it will be perfect. I want people to learn that there can be many "right" answers and any one of them will produce satisfactory results. Next, I want them to think about their options so they can figure out which potential solution will produce the best results and, that they don't have to do that by themselves. They can collaborate or ask for help. I have learned that I am most inspired by collaborating with others who have experiences and talents that are different than my own and I want to bring that culture to the way my teams operate. I like to help people find the value in their ideas, because that is where as a coach, I can inspire them to see the wisdom and insight they bring to the table when seeking solutions. If we ask the right questions of one another, we can find the answers we seek. I want my teams to experience the power and richness of collaboration and its impact on the way the team thinks, evolves and achieves together without always having to "be right" or come up with the "one right answer." What pressure! Besides, there really isn't only one right answer. Lastly, and most importantly, I want to reward them as a team for the results the team achieved.

The Influence of Psychological Foundations

Another important influence on me was my undergraduate background in psychology and it played a major role, first in my position as a sales manager calling on my client's call center personnel and later in how I motivated my own direct reports in doing their jobs. Psychology has always fascinated me, particularly behavior modification. The combination of my undergraduate studies and application of psychological theory formed the philosophy behind how I motivated my teams, whether they reported to me or not. An example of one of my greatest successes has been in designing incentive contests and motivating my client's customer service representatives (CSR's) to produce outstanding results based upon my understanding of the psychological principle of schedules of reinforcement (Whaley, & Malott, 1971, pp101 – 141, Appendix E). The battle for performance is won in the mind of the performer. If a person believes they can achieve the goal, they are half way to the goal and if I can motivate them to put forth consistent effort even in the face of failure, I know they will be successful so I would devise contests with incremental goals and then measure the results.

Early in my career, I discovered how to move people in baby steps from average to good performers and from good to excellent by using the psychological principles of the schedule of reinforcement and creating an incentive contest that would reward people for the sales they made at certain intervals, and I built in team rewards to encourage sharing of information so that everyone would be successful. At one account in a six week period, their

manager and I set a team goal of 150 sales for a team of seven, but because they were selling over the phone they had individual milestones where they could collect prizes for reaching each of them. This group had average to mediocre performance prior to the incentive, so we agreed to set individual goals low and ratchet them up as the incentive progressed. They got a key chain when they sold their first unit, a ceramic mug when they sold three and a t-shirt for ten sales, all with the company's logo on them. Prizes were cumulative so they knew they would be awarded all three of them.

Initially, the sales people thought the "big goal" of 150 sales was too hard, but I coached them to share sales tips with each other so they would hit the team goal and within a week they each already had five to ten sales. They told me later that they would think, "Well, that was easy, now I want the next prize, too, and I only have to sell five more to get it!" So they kept selling and after three weeks their manager called to say they were about to hit the team goal and we still had three more weeks to go! I told her that I would add prizes and we upped the goals again – twice. In order for the prizes to be paid out, the team had to hit the team goal. In addition, we gave out raffle tickets for every five individual sales they made, another interval, and had a drawing for the big expensive prizes, one of them tickets to a Broadway show in New York City, a prize the team suggested. The raffle awarded people prizes on a variable-interval schedule of reinforcement, where the more they sold above the team goal, the more raffle tickets they would receive, but they would not know for sure when they would be rewarded so they just had to keep on selling.

The team and the individuals were both rewarded, but they were integrally tied together. As a result, seven people sold an astounding 1,253 units and each person went home with at least ten prizes. Everyone was happy and I learned the value of baby steps and became a firm believer in consistent and persistent effort coupled with sound psychological theory. This was not the only group to produce these results. Although I bragged about them to subsequent groups, I challenged each new group to surpass the previous one's efforts. I have never been disappointed, and I have gotten repeatable outstanding results from subsequent groups, an important metric in psychology.

My personal coaching model has evolved over the course of my career from experiences that have impacted me both positively and negatively. As a positive person, I like to coach by motivating and inspiring my people to higher levels of performance and I generally use the developmental coaching model while incorporating what I learned while coaching athletes, utilizing what I valued from past managers and my undergraduate background in psychology.

CHAPTER 6

COACHING PROFESSIONALLY

I am firmly on the road to professional coaching and in this chapter I will discuss five coaching engagements that impacted my present coaching practice. Each of these coaching engagements helped to hone my skill set and further develop my competencies. The five areas I have been coaching in are:

1. A team of Penn undergrads as they worked to become a team
2. Senior leaders at Blue Sky World Telecom, a corporate environment, as they managed up and coached their direct reports
3. Executives at BioGenetics Pharmaceutical Company on personal development goals
4. Clients of Global Transition Consultants coaching clients through job loss and career transition
5. Middle managers at the Office of Health & Administration, a state government agency, using LIFO® based coaching sessions to manage strengths for leadership development

Coaching Penn Undergrads to Become a Team

In DYNM 201, Team Dynamics in Organizational Settings, I was one of six coaches who coached an undergraduate team of six students during the fall semester of 2009. My team was comprised of Penn varsity athletes, four men and two women, of which two students, Nathan and Holly, were captains of their respective teams. Students took the class because they wanted to learn more about how teams become high performing teams, how to be a better team member and in the case of team captains and those who aspire to this position, leaders. My role as coach was to observe the team as they worked through their activities, be a resource for them in answering any questions that they had,

facilitate maintenance meetings, and let the team determine how they would fulfill their course requirements, coaching them as they requested assistance or I observed an issue that required discussion.

My team was comprised of thoughtful, intelligent young adults who were interested in succeeding at accomplishing the requirements of the class. I noticed that they were all introverts and discussions began slowly, often with a preliminary period of silence. Initially, they were friendly and everyone attempted to get along by agreeing with everyone else. They focused on completing their assignment so they could move on to the next without a vested interest in the outcome of the activity. Therefore, the team members did not take a position and defend their rationale as to why the group should make a decision regarding a particular task. For example, during the scavenger hunt, they selected random items without giving much thought to what they might have to do with them later and agreed to select an item just to agree. That resulted in the team losing seven of their ten items after they conducted consensus validation, a methodology that measured the degree to which team members agreed on selected items. Since team members voted that those seven items were valued below seven on a scale of one to ten with ten being excellent, they had to replace them on their own time outside of class.

During “Murder One,” an activity that highlights the need to share information, personalities began to emerge with one person, Doug, attempting to take a leadership role by making suggestions and pushing the team to accept his suggestions without much discussion. I noticed another member, Mark, sitting

with his chair pushed back just outside the team's circle who was listening but not contributing much, and he later remarked that he had a hard time hearing. The most conversation occurred between Doug and Nathan with Holly, Ava and Mike contributing occasionally. When I conducted the maintenance meetings at the end of class asking the members about the activity and whether they thought there was any other way to discover the activity's answer, Mark suggested that they could have read the story aloud but his comments were largely ignored, yet his suggestion would have revealed the inconsistencies that marked the differentiated story versions each member had. That would have likely led to a discussion about the suspects, and that conversation could have produced the correct solution.

The following week, Doug was absent and the team noticed a difference in their communication style and how much more productive the team was. This was reinforced when a member of another team interviewed each member of my team, and their comments showed up in the feedback. When Doug returned to the team, I took him aside and coached him on how to express himself without making the team feel dominated by his comments. In my feedback session with the team, the members recognized Doug's behavior and Ava said she "blasted him outside of class with the full force of her CT LIFO® style" telling him to stop monopolizing the conversation in team discussions. Doug meanwhile, said he thought he had suppressed his commanding style and was being overly agreeable.

Coaching the undergraduate team, I learned that this team was experiencing what teams generally experience when cycling through Tuckman's stages of group development. In the forming stage, they quickly agreed to appear friendly, especially when they didn't have a vested interest in the outcome and "group members rely on safe, patterned behavior and look to the group leader for guidance and direction" (Five Stages of Group Development, Pfeiffer & Company Theories and Models, 1991, p100).

The team never made it out of the forming stage. While they had a few skirmishes, they never truly entered the storming stage and certainly did not become a high performing team. "The performing stage is not reached by all groups" (Five Stages of Group Development, Pfeiffer & Company Theories and Models, 1991, p102).

Coaching in a Corporate Environment at Blue Sky World Telecom

The first consulting job I sold was to Blue Sky World Telecom where my classmate, Todd, asked that my business partner, Lynn and I, come in to coach his senior leadership team and present a half day training session on LIFO® styles to them and their direct reports. I coached Todd and his peer David, both VP's. David was in charge of Public Relations and he was interested in knowing more about how he could use LIFO® to improve his communication with others, particularly with his hard charging boss, Kyle, the president. We were interrupted in the middle of our coaching session by a call from Kyle summoning David to his office. David asked me to continue our coaching session so I asked him to tell me about Kyle's communication style.

David described a controlling-taking person perfectly. Kyle was a forceful, direct, quick to act, urgent, and a bottom line results-oriented person who wanted to capitalize on an opportunity that had developed overnight. David had been addressing the opportunity he knew was coming, but his plans were not fully in place.

I focused on preparing David to talk with his boss. I coached him to give Kyle a top line overview of his plans. I let him know that Kyle only wanted to know that David had a plan for addressing the topics under discussion and that if his plan failed, David had a plan B. David was surprised to hear that but glad because his plan would not gel before he had to meet with Kyle. I told him that Kyle didn't want to know any of the details, background information or why David was doing what he was planning and I coached David not to discuss details, but rather to talk with Kyle in bullet points ending with what David was going to deliver and when. I also told David that he could disagree with Kyle and briefly say why his own plan would work best so long as he could capitalize on this opportunity and he could deliver what he promised.

David was gone for fifteen minutes and when he returned, he had the biggest grin on his face his colleagues said they had ever seen. David related that he had the most successful interaction with Kyle that he had ever had. He had disagreed with Kyle, suggested an alternative in line with his plan, got his points across and convinced Kyle that he had the situation well in hand. Best of all, David said he felt confident doing it and the stress he usually felt was gone, replaced by relief that he didn't need to discuss all Kyle's issues in detail. Later,

Todd told me that David was “sold” on LIFO® and the slide-a-style tool we used in the training session describing what each communication style wants to know, and it was constantly in his hand thereafter while he was on the phone with the media.

David’s success with his difficult boss resulted in my doing another training session to introduce Todd’s entire regional team to LIFO® in an interactive training session several months later. Through this coaching session, I was able to observe LIFO® principles in action.

Executive Coaching at BioGenetics Pharmaceutical

Coaching an executive at BioGenetics Pharmaceutical gave me the opportunity to apply the same coaching principles in a publically traded corporate setting as I used with my first client, Tamika, in a supervised classroom setting.

My client, Jill Curry, had experienced difficulty fitting into the corporate culture after joining BioGenetics, a large pharmaceutical company that developed and manufactured specialized therapeutics. When I met Jill, she had been with the company for several months, had planned to move across the country to work at the company’s corporate headquarters, but had negotiated a work from home arrangement with her manager that negated her necessity to move. Jill was seen as an ineffective communicator who wore her feelings on her sleeve.

Jill’s department head, Carrie First, was the director of global learning and development for Research and Development and, as a coach herself, was a believer in the value of executive coaching. When Carrie offered the opportunity for her direct reports to be coached by external consultants, Jill was excited to be

included in the program and looking forward to working with me. Jill's goal was to be a successful team leader by communicating effectively, being available to her team for scheduled and impromptu meetings and discussions, and being seen by senior leadership as promotable even though she wasn't in the office every day.

In coaching Jill, I used the Wilkinsky 9-Step coaching model beginning with engaging and getting to know her, and setting goals that she wanted to achieve. I gathered data from her manager, peers and direct reports by interviewing them using a list of questions we decided on together. She wasn't surprised by the feedback she received, and together we agreed on a plan for Jill that allowed her to practice the new skills we discussed in live, low risk settings first before using them in more important interactions when her visibility could be observed by her manager and other senior leaders.

In the year that I coached her, Jill worked on how to contribute in peer meetings and respond appropriately to suggestions when she didn't agree with them. She learned how to phrase requests so that she was able to get the results she wanted, interact with others virtually and in person with grace and confidence, and to control her emotions when confronted by the words and actions of difficult people, one peer in particular. Jill's major area of learning was how she could best fit in from a distance, deal effectively with others, especially difficult people, and control her emotions so that she appeared to be the competent, confident leader that she was. She has since been promoted and is performing well for the company.

I learned that the principles that I had been learning, the models, the tools, the techniques and the normative coaching protocol were the same for Jill as they had been in past coaching experiences, and had again proven to be very effective.

Career Transition Coaching for Global Transition Consultants

I have been doing career transition coaching for Global Transition Consultants for over a year and a half. Coaching is done virtually, over the phone and through the internet via a password protected website. My clients are assigned by the company I consult for and I contact my clients via phone to begin their career transition process. I engage them in the process, explain the benefits of coaching and talk with them about their next steps. Some people expected to be laid off, others thought it would happen to someone else, some were in shock, and occasionally, some were very happy to have the opportunity to re-direct their life toward something they had wanted to do for some time.

When a person experiences job loss, they go through the same stages of grief as someone whose loved one has died, so it is important to coach them so they can honor their past and see possibilities for their future. I ask open ended questions to draw them out and get them to express what they are feeling. They cannot move on until they do. Then I ask them to reflect on what they do best, paying attention to those things that they think are easy because those are their gifts. What I enjoy most about this type of coaching is that when I ask the right questions, my clients are able to reflect on what they love to do, are passionate about, and have been dreaming about for most of their life. After job loss, some

are ready and able to create a plan to implement their dreams once they realize they now have the opportunity to do so. I love helping them to connect the dots created by their work life to create a new future they will be passionate about.

I can do that because that is my gift. On the Enneagram (Riso, 1996, p12), a system of describing the nine personality types from unhealthy to highly functioning healthy personalities, I am an eight, a leader. One characteristic of the leader personality is that I can see how disparate things go together, or I "see the possibilities in people and in situations that others do not recognize" (Riso, 1996, p309), and that aptitude helps me to generate ideas about the kind of work my clients may be good at but have not thought about. I ask questions to uncover insights into my client's capabilities and discover their unfulfilled dreams. In my coaching practice, I am able to guide my clients through thinking about what would make them happy in their next job by listening to their stories and asking probing questions that reveal hidden, untapped skills that will lead them to multiple pathways using the talents and experiences they already have. What do they enjoy doing? What do they love? What are they passionate about? What successes have they had that they enjoyed and were most proud of achieving? The answers to those questions have provided a doorway into identifying their strengths. Since I have personally transitioned to a new career several times, I am skilled in recognizing how skills in one job are utilized in another and I help my clients see how they can take their skills and apply them in new ways to re-energize their careers.

The results of this coaching have been that more than 40% of my clients have landed new positions, even during the recession in 2009 and 2010, well above the percentage of clients coached by my peers who have found new jobs. What I learned is that to do this coaching well, I have to be an extraordinary listener, able to ask the appropriate questions that get my clients to move beyond their anxiety of not having a job while getting them to focus on their strengths. Then I can teach them the mechanics of job search so that they can successfully become employed again doing what they love most.

LIFO® Coaching for the Office of Health & Administration

The Office of Health & Administration, a state government agency, offered a LIFO® 4-session coaching program to middle managers who wanted to utilize their strengths and develop leadership skills. The six managers who signed up for the program each had an average of 15 – 20 years of experience at the agency. They felt they had good technical skills in their jobs, but wanted to become better leaders capable of coaching their teams and increasing productivity.

LIFO®, discussed in Chapter 4, was used as the basis for my coaching three managers. Each manager took the LIFO® survey and received feedback, discussed behavioral options, and developed and implemented an action plan using “SMART” goals, that is, specific, measurable, achievable, relevant and timely.

One of my clients, Kate, was a department manager and a direct, no nonsense kind of person. She prided herself on finding a way to get the job done

no matter what the challenge. Over time, she had worked her way up the ladder and valued getting results. Her LIFO® survey revealed that she was a controlling-taking person. After we discussed the behaviors that each LIFO® style characterized, she realized that she had the greatest difficulty with conserving-holding people because they liked to go into detail and over analyze everything and she said it made her eyes glaze over. She and Randy, one of her direct reports, were clashing and she wanted to use her coaching to learn how to coach him better. As it turned out, he too, was a conserving-holding person.

We talked about what is important to people with that style, and why they were clashing. She was annoyed because her department was buried in work and Randy was being too thorough. I asked her if there was a particular project that would play to his strengths that she could assign to him and she said there was. I asked her to reframe the assignment by suggesting that she could tell him that she knew he could do the job and would he like to be in charge of this special project for her? The benefits of doing that were that he would not miss anything important, and details were her blind spot. A blind spot could cause her to screen out or miss available options or opportunities whereas Randy, with his conserving-holding style, would not. If there was something that required a decision from her, he would be sure to bring it to her attention. She liked that idea and agreed to try it at work.

In our next session, she reported that when she asked Randy to be in charge of the project, he lit up immediately. He was excited about it because this was the first time she had given him an important project and he said that he was

glad she trusted him to lead the project and felt valued that she asked him to spearhead it. Kate was thrilled because it meant that she had engaged him to handle a huge complex project and she could delegate it knowing that the project and all its details were in good hands.

After the coaching sessions at the Office of Health and Administration, my clients reported high satisfaction with the coaching they received and a high level of success on the job.

In each of the above coaching experiences, I was able to apply the theories, frameworks, methods and practices learned in my MSOD journey to practical coaching experiences. Each enhanced and honed my skills and competencies as a coach.

CHAPTER 7

CONCLUSION

When I began my journey, I was a sales and marketing executive who was looking for the opportunity to enhance and grow my skill set and I am fortunate to have found the University of Pennsylvania's Organizational Dynamics program. It has provided me with the kind of intellectual challenges I was looking for and a superb academic fit.

While at Penn, I have taken courses in three concentrations, Organizational Coaching, Leadership, and Change Management that have prepared me to coach inside an organization or as a coach in my own consulting practice.

Today, I am at a crossroads between these two life paths. I love being part of an organization where my skills can be utilized to contribute to the organization as a whole to make it a better place to work, and I enjoy the one to one client interaction and the flexibility that having a coaching practice allows.

As I think about what I would like to do next as a coach, I would like to have the opportunity to work with people who would like to become better leaders, especially in times of change. I am particularly good at seeing the big picture of what an organization could be and recognizing how people with particular skill sets can be effective in their roles while the world around them changes.

I am also a very effective career transition coach to those who have lost their jobs in a reduction of force downsizing. Although this is a very traumatic

time in their lives, I view it as an opportunity for them to do something they love that they might not have had the courage to do on their own had they not been laid off. My experience having been through this several times and my personality type give me the strength to see them through to the possibilities they can create for themselves when they focus on what they are passionate about. I have to wonder what the world would be like if everyone who works worked at a job they loved and were passionate about every day. What kind of productivity and achievement might we all create if everyone could use their best talents to do what they love all the time?

I have learned the theory of executive coaching and have been afforded the opportunity to apply my learnings in supervised practical experiences that have led to my becoming a practicing professional coach. I have enjoyed the journey, acquired new skills and experienced the joy of watching my clients transform themselves before my eyes knowing that I contributed to their success and made a difference in their lives. More than anything, that brings me joy. I feel that I have learned much during my time at Penn, but I still have much to learn.

Insights for Readers

For readers who may be following a similar path to their own life's passion, I would encourage you to have persistence and never give up on your goal, no matter what it is or who thinks its achievement isn't possible or "realistic." It is never too late to do what you love no matter what your age or other restriction you may place on yourself. Have the courage to take that first step because

when you create action, you will be on your way toward accomplishing your goal. Life flies by when you are not paying attention and just living your life, so start today to do something that will bring you joy. Don't get stuck on "someday I'll…" Some day may be… never. We will all be working a long time, so think about what you would truly love to do.

If I were able to coach you, here are a few of the questions I would ask and three exercises I would suggest to help you clarify your thoughts and get you to think about what is really important in your life. Write down the answers in a journal and date each entry (remember to include the year). Tell yourself a story about each one.

1. What do you enjoy doing that you would do, even if you weren't paid?
2. Do you like to work with people, ideas, things or a combination of them? Write a story about what you did when you did some or all of these things.
3. What are you are passionate about?
4. What are you doing when you lose track of time?
5. What kind of an environment would you like to work in? Imagine it in as much detail as you can and write about it.
6. How much of your income are you able to save each payday so you can build a nest egg that will allow you to fund your dream? (Or survive being downsized?) Review your finances and ask yourself what is more important, spending money or your dream?
7. What do you do that you think is "so easy anyone can do it?" That is your gift. How many gifts are you discounting? List them.

8. What do you value most?
9. If you could change one thing in the world, what would it be? What would that mean to all of us?
10. When do you feel most alive, happy and enthusiastic?
11. When you were younger, what did you always want to be? Why?
12. How do you want to contribute to the world?
13. What would you like to be remembered for?
14. What do you keep thinking about even though you think you shouldn't or it is not important?
15. What attracts you again and again, even if you think you have outgrown it?
16. What legacy would you like to leave to your family, your organization, and the world?

Exercises

Think about each of the exercises and write as complete a story about each one as you can. It is not possible to capture all of your thoughts in one sitting, so revisit them often and add, change and re-create the story until it rings true to you. Don't be surprised if some things stay the same while others change. That's okay. Just write.

1. You have won the lottery and have more money than you can ever spend. You have taken so many vacations that you can't take one more. They bore you. You have bought everything you have ever wanted and there is

nothing else to buy. You have decided to work. What will you do? What is your purpose?

2. Your great-great grandchildren are doing a video report about you at school and they show clips of your life. What are they saying about you? What makes you smile? What are you proud of?
3. Many businesses have mission statements to help guide them toward their goals. They define what the company is and what the people there are working toward. Start to write your own personal mission statement. It may change as you clarify your goals. Where do you want your life to go? What paths are on your life's map? Create your own "amazing race."

Once you have written the answers to the questions and completed the exercises above, look for the threads that runs though your stories. What speaks to you? What is nagging at you that you are resisting? Pay attention, no matter how impractical or silly they may seem and don't brush them off. These are the clues to your best life. Often, they don't have a voice so the messages won't be clear. What does your heart want you to do?

You can take the first step toward making your dream real by journaling. The next step is to select someone to whom you can tell your dream who will thoughtfully consider what you have to say and won't laugh or dismiss your words as a passing fancy or worse, criticize or betray you. Instead, this person or persons will ask questions that may prove insightful in helping you think about possibilities and later, insist that you use critical thinking in making your choices. They will cheer you on, tell you the truth and keep you on track toward achieving

your goal. Pick someone you can trust, and choose carefully because it matters greatly who you tell your dream to. A poor choice can derail you and a great one can inspire you. I hope you will tell your coach, and I also hope you will have supportive family and friends around you who will tell you when you are about to step in quicksand and when you are making a good choice at a pivotal time.

I did many exercises like the ones above in finding my passion. It is uncanny how what I wrote then has shown up in my life now. Those things may not be exactly as I had envisioned them, but they are so close I recognize that I wrote about them and put my desires for them into action. That is why it is important to express your goals in detail. My favorite quote as I planned my path was, and still is, as follows. Perhaps it will inspire you, too.

> Your mind would not formulate a strong desire for something that it is incapable of achieving. All of the resources necessary for the attainment of your goal are within your grasp, and will reveal themselves to you if you will set your sights upon that goal and strive persistently towards its achievement (Anonymous).

My Future as a Professional Coach

I have been working as a consultant for a year and a half and enjoy the work. It seems like play to me because it is effortless much of the time. Play has a negative connotation in the business world but in my experience, when we are doing our best work and are at our most productive, we are “in flow” and to me, it feels like playing. I like the feeling of playing at work and the contributions I make to my clients.

My plans for the future are fluid at present as I consider all of my options. For now, I plan to continue coaching and build my consultancy to include more private clients and corporations. I would like to partner with classmates who have a similar interest to develop and deliver coaching programs that would help individuals, teams and organizations reach their fullest potential.

I would also like to develop a part of my business around training others to use LIFO® effectively in their daily life. While at Penn, I was LIFO® certified and became a master LIFO® certified professional this March which enables me to certify others to conduct LIFO® trainings. I would like to continue to coach and train using this behavior based method for understanding and communicating well with people in any situation.

I will look for projects that interest me where I can make a difference in the lives of those I work with and to the organizations to which they belong. There have been many things that I have learned during my program at Penn that can only be used in large corporations, and if I have the opportunity to contribute to a change effort and work with people to ease their transition and help them grow in their jobs, I will pursue that path.

My dream has been that everyone who goes to work loves what they do and if they don't, they stop doing that job and find the one they are good at so they can be the person they were meant to be. How much happier might we all be if only this were true?

My goal is to coach as many people as I can to reach their highest potential. My journey began with a single step and I have walked miles since. I

can attest that it has been a magnificent journey and it is not over yet. I will always keep learning and growing and helping others to do the same. My wish for my readers is this.

> Reach high,
>
> For stars lie hidden in your soul.
>
> Dream deep,
>
> For every dream precedes the goal (Pamela Vault Starr).

Start now to live your life with happiness and joy and remember that it is the journey and not the end that is most important. It will be worth every step.

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APPENDIX A: THE COACHING CONTRACT

February 20, 2006

Ms. Tamika Lee
Coaching Client
University of Pennsylvania
The Arts & Sciences of Organizational Coaching
Penn D641

This coaching contract between Tamika Lee (client) and Mary O'Connor (coach) will detail the agreement between the parties for the execution of coaching services during the University of Pennsylvania Organizational Dynamics Course D641, "The Art and Science of Organizational Coaching." The agreement may be amended by either party at any time during the period as needs change with notification to the other party in writing so that it can be added as an addendum to the agreement.

Time Period

The coaching period will be from February 2 to April 6, 2006. The parties will meet a minimum of once per week outside of class time for a minimum of 45 minutes to a maximum of 1 hour per session, except when the parties decide that an extended session is required to complete session work.

The coaching sessions will take place according to the schedule set forth below. The parties agree that all sessions will take place in the evenings after regular working hours so that the parties can devote their focus to the coaching sessions, unobstructed by work demands, stress or emergencies.

Coaching Schedule

Session	Week Of…	Date	Time	Location	Caller
Introduction	January 30	February 2	7:00p – 8:00p	Class	-----
Session 1	February 6	February 8	8:30p – 9:45p	Phone	Mary
Session 2	February 13	February 14	12:30p – 1:30p	Phone	Tamika
Session 3	February 20	February 20	8:30p – 9:30p	Phone	Tamika
Session 4	February 27	March 27	8:30p – 9:30p	Phone	Mary
Session 5	March 6	March 8	8:30p – 9:30p	Phone	Tamika
Session 6	March 13	March 13	8:30p – 9:30p	Phone	Mary
Session 7	March 20	March 20	8:30p – 9:30p	Phone	Tamika
Session 8	March 27	March 27	8:30p – 9:30p	Phone	Mary
Session 9	April 3	April 3	8:30p – 9:30p	Phone	Tamika

The schedule may change according to work demands of the parties and each agree to notify the other in advance by phone or email should their session need

to be rescheduled. The rescheduled session will take place during the same week as originally scheduled, except in the event that there is an emergency. In such a case, the parties may conduct more than one coaching session in a particular week to ensure that a total of at least nine coaching sessions are conducted. A week is defined as the period beginning on a Monday and ending on a Sunday.

Client Goal

The client has decided on a goal for her coaching sessions. The parties recognize that the goal may change over time as the coaching sessions progress, and agree that this is acceptable. The beginning goal, to be known as the "original goal" is as follows.

"Work has become routine and predictable. Therefore, the client lacks motivation. The client wants to recapture the passion and enthusiasm in her work, either inside her current company, Verizon, or through her love of community volunteer efforts, such as the Delaware Valley College Tours, Inc. board. She feels the stress of work-life activities that are out of balance and wants to determine where to place her energies for greatest fulfillment and satisfaction."

Over time, should the goal change, it will be known as the "emerging goal" and it will receive the full attention and focus of the parties, who expect that this will occur as the client formalizes her goal and clarifies her vision of what she wants her life to become.

The parties recognize and agree that the stated goal may not be achieved during the allotted time period covered by this agreement. It is agreed that the outcome will be a work in progress to proceed at a pace determined and directed by the client in accordance with her comfort zone and her ability to move outside it to experience change in her work and home life.

Preparation

The client agrees to complete a coaching prep form to the best of her ability and email it to the coach at least 4 hours in advance of the coaching session. The coaching prep form template is found in Appendix B.

Metrics

The parties agree that they will employ a variety of metrics which will be selected and finalized from the list below and may include the following:

- Interviewing past co-workers.
- Interviewing members of the community organizations to which client belongs.
- Interviewing the client's boss.
- Interviewing members of other departments the client works with.
- Questionnaire to the client's co-workers.
- Questionnaire to the client's direct reports.
- Non-invasive data in the form of reviews.

The client and coach will determine which of several questionnaires the client will take during the sessions.

- MEP – Management Effectiveness Profile
- MAPP – Motivational Appraisal of Personal Potential
- A Strong Interest Inventory type test

The client will provide the coach with her recommendations on the people who should be interviewed, given a questionnaire or both. After the parties agree, arrangements to interview or email a questionnaire to the persons involved will be made.

Interviews will take place beginning the week of February 20 and will be completed by the week of March 20. Those persons who do not agree or do not respond to a request for an interview three times will be dropped from the list and a replacement named. Interviews will be no more than 60 minutes and can be as short as 20 minutes.

The same questions will be asked of each person. The list of questions will be finalized during Coaching Session 3. (Potential questions are below.)

1. What are Tamika's 3 key strengths?
   - Can you give me an example of each?
2. What 3 competencies could Tamika improve to:
   - Be more effective in her job?
   - Be promotable?
3. What are Tamika's 3 most positive qualities as a manager/employee/peer?
4. What 3 things could Tamika do to create a more positive work environment?
   - If "nothing," what 3 things has she done to create such an environment?
5. How does Tamika react under stress?
   - How does that make you feel?
6. What kind of leader is Tamika?
   - How effective is she?
7. How is Tamika at being led, acting on your directions / taking direction?
   - How cooperative is she?
   - How is she at accomplishing the task or project?
8. How is Tamika to work with?
   - What about her style causes you stress?
   - Talk about her ability as a team player.

Rules of Engagement

Both the client and the coach will maintain confidentiality of the information discussed as part of the coaching sessions. The coach will never disclose to any third party any information learned from or about the client or the client's associates in the course of the coaching sessions without expressed written permission from the client. The coach will not criticize the client for any reason nor discuss any actions taken or not taken by the client with any third party.

The client will be sensitive to the nature of the coaching process and if unsatisfied with the coach, will discuss the nature of the dissatisfaction with the coach and a mutually agreeable remedy will be sought. The client will not criticize the coach nor express displeasure to others so as not to harm the coach's reputation in the coaching community.

Ending the Client/Coaching Relationship

The client and coach will collaborate on a review of the coaching process for the purposes of writing the final paper for the course D641 and to recap the results of the coaching sessions for the client. A plan of action will be drawn up so that the client will have implementable next steps after the coaching sessions end should she wish to pursue those items as a continuation of her goal should it not be achieved during the sessions.

Agreement

This agreement is freely entered into by the parties and each agrees to put forth their best effort to complete the coaching relationship to the best of their ability.

Agreed to by:	Agreed to by:
_____	_____
Tamika Lee, Client	Mary O'Connor, Coach
On the _____day of 2006.	On the _____day of 2006.

APPENDIX B: COACHING PREP FORM

The author would like to acknowledge the work of her coach, Julie Fuimano, for the development of this coaching form[1].

Name: Tamika Lee Date: Session 1

1. What have I accomplished since our last call? (What are my Wins!) What are my insights or 'aha's?
   -
   -
   -

2. What didn't get done, but I want to be held accountable for?
   -
   -

3. What am I grateful for?
   -
   -
   -

4. What do I want to get out of the call today?
   What are the challenges, concerns, achievements, insights, opportunities or areas of learning to be addressed?
   -
   -

5. What are my action steps, between now and our next call?
   -
   -
   -

6. Other topics I want to talk about are: Anything else?
   -
   -

APPENDIX C: LIFO® Descriptor Questionnaire

Dear Colleagues,

Thank you for your willingness to participate in the LIFO® descriptors 360° feedback process on my behalf. This questionnaire should take no more than 15 minutes.

Directions:

Step 1. From the list below, please select 15 adjectives that best describe my behavior. Place a check on the line next to your selection.

Step 2. Forward your responses to my coach, Mary O'Connor, (email…), who will compile your responses with those from everyone participating in my feedback and deliver them to me as themes.

Please **do not** return it to me to assure the anonymity of all respondents. Your opinion of my work style is important to me and I know I can count on you for honest feedback. My goal is to use this feedback for continuous learning and improvement. Thank you! I sincerely appreciate your help!

Tamika Lee

Continue to the next page to fill out the LIFO® descriptor survey.

LIFO® Descriptors Survey

Select (check the line) 15 adjectives that best describes Tamika's behavior.

___ Considerate	___ Helpful
___ Directing	___ Forceful
___ Tenacious	___ Steadfast
___ Flexible	___ Adaptable
___ Idealistic	___ Receptive
___ Quick to Act	___ Competitive
___ Practical	___ Thorough
___ Tactful	___ Inspiring
___ Modest	___ Responsive
___ Confident	___ Risk-taking
___ Economical	___ Methodical
___ Sociable	___ Experimental
___ Trusting	___ Seek Excellence
___ Seek Change	___ Persistent
___ Reserved	___ Detail-oriented
___ Empathetic	___ Negotiating
___ Cooperative	___ Loyal
___ Persuasive	___ Urgent
___ Factual	___ Analytical
___ Enthusiastic	___ Animated

APPENDIX D: THE 30 SECOND ELEVATOR SPEECH WORKSHEET

The author would like to acknowledge the contribution of Anne Dunn for the creation of this worksheet[2].

Area of Expertise: _____

Most Recent Position: _____

Future Job Focus: _____

Ultimate Dream Job:

What characteristics are found in the job that you love doing?

1.
2.
3.
4.
5.
6.

Target Position List:

What characteristics must you have in your next job for it to be passionate for you?

1.
2.
3.
4.
5.

Key Informational Requests from Networking Partners:

What do you need from others that they can reasonably give you? Don't assume, ask!

1.
2.
3.
4.

Key Information ***YOU*** can give to Networking Partners:

This may change based on who you talk with!

1.
2.
3.

APPENDIX E: SCHEDULE OF REINFORCEMENT

	INTERVAL	RATIO
FIXED	FIXED INTERVAL	FIXED RATIO
VARIABLE	VARIABLE INTERVAL	VARIABLE RATIO

- **Schedule of reinforcement** – a specific way in which reinforcement is programmed to occur as a result of a number of responses, time between responses, or other temporal or quantitative features of responses
- **Continuous reinforcement –** the response is continuously followed by reinforcement
- **Intermittent reinforcement –** a response produces a reinforcement only occasionally
- **Fixed – Ratio reinforcement** – reinforcement is forthcoming after a specific or fixed number of responses occur
- **Variable – Ratio reinforcement** – reinforcement occurs after a variable number of responses
- **Variable – Interval** – reinforcement occurs after intervals which vary in length
- **Interval** – a reinforcement is delivered every n^{th} seconds
- **Variable** – reinforcement occurs randomly after every n^{th} number of responses

(Source: Whaley, D. & Malott, R. (1971). Elementary Principles of Behavior. New York, NY: Meredith Corporation. Pp101-141.)

NOTES

[1] I would like to acknowledge the contributions of Julie Fuimano, the original creator of the questions for use in the coaching prep form (Fuimano, 2006).

[2] I would like to acknowledge the contributions of Anne Dunn, the original creator of the 30 Second Elevator Speech Worksheet (Dunn, 2006).

[3] The Management Effectiveness Profile (MEP) Published by HRD Press, Inc., copyright 2003, was one of the two assessments given to Tamika Lee during the author's first coaching engagement as noted in the coaching contract.

[4] The Motivational Appraisal of Personal Potential (MAPP™), Assessment.com, copyright 1994-2005, was the second of two assessments given to Tamika Lee during the author's first coaching engagement as noted in the coaching contract.