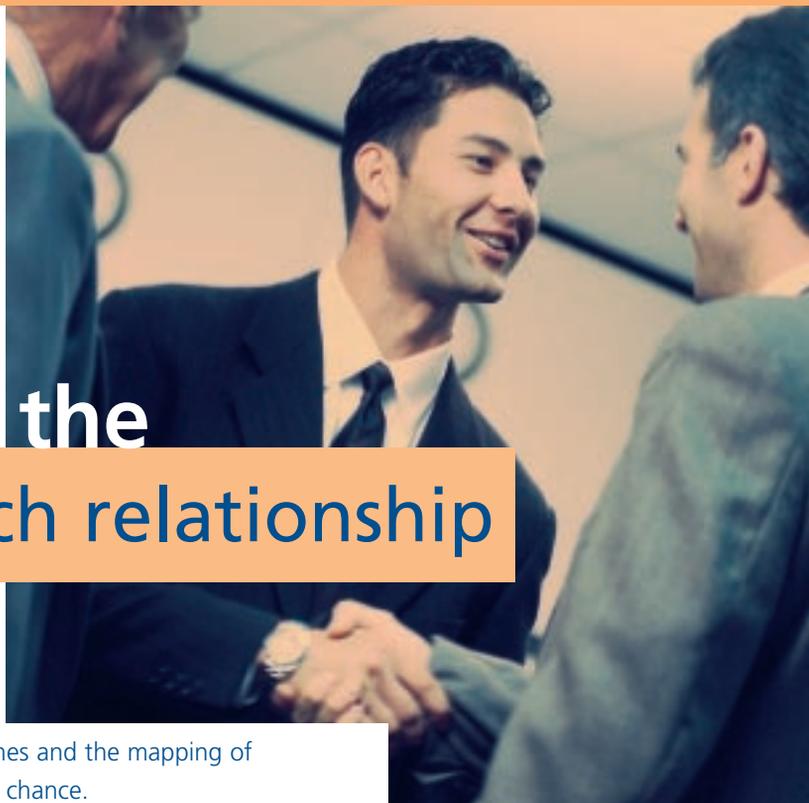


Managing the client-coach relationship

Philip Atkinson and Ann Atkinson



The issues of selection of external coaches and the mapping of progress are too important to be left to chance.

This module highlights the key issues that need to be addressed, not just in selecting an external coach but also in mapping progress.

The selection of external coaches is possibly one of the most important and critical decisions that HR managers have to make in terms of developing their people. Simply stated, the nature of coaching work is usually confidential. Usually, there is not too much specific dialogue with others outside the coaching relationship. Most of the time, the issues, debates and discussions that take place between the client and coach within their one-on-one relationship, are sacrosanct. This being the case, how can one be certain one has the right coach for the client? In a training or change management arena there are objective methods and cues that can be applied to assess the

viability of a particular trainer or facilitator's effectiveness. In the coaching arena there is much more trust evident. Bearing in mind that the coach should have a tremendous positive impact on the client, how can we ensure that we have the right coach, that the relationship is leading to significant strides in the personal performance of the client, and that improvements are evaluated and, preferably, documented in some form?

Objectives

In our view, coaching should lead to significant performance improvement for the client. If progress is mediocre or difficult to define, the coach needs to firm up the objectives themselves and then with the client. Coaching has been described as 'tough love'. Although a great deal of coaching is explorative, fundamentally it

should enable the client to operate beyond their current envelope of performance. It should ideally provide people with the confidence to move and operate outside their present zone of comfort. The tough love element arises when a coach has to take hard decisions and actions to support the client in making changes. This is counter to the often cited ideal that coaching is fundamentally soft and gentle, rather than tangible and challenging. Some of the best coaches have been described as quite challenging 'in making one face up to taking ownership and action'. To clarify this point, the coach and client should ideally focus their energies on developing a psychological contract which includes specified deliverables. Deliverables may range from learning new things, taking action and practising new behaviours to committing to working differently.



Manage expectations

and responsibilities from the outset

Psychological contracts – to be, do and have

Specifically, it is ideal if a coach helps the client work through the process of what they want to *be* individually, to *do* differently and *have* or experience in tangible terms. Defining these in precise ways enables the client to undertake their own gap analysis. The client is in a much better position to assess what actions they can take when they clearly assess where they are starting from and where they want to go. We cannot overemphasise the importance of target setting. This is applicable over the whole range from executive coaching to life coaching. The client will commit to action when they have clarified the exact state or condition beyond which they wish to move.

Clients and sponsors

Prior to any target setting being undertaken comes the negotiation between those who will receive

coaching and the sponsor of that coaching. Although some clients go out of their way to choose a particular coach, often the practice is for the sponsor – sometimes HR and sometimes line managers – to initiate the trawl for the ideal coach. Particularly when the coach is external to the organisation, the wrong choice can be disastrous. So it's important that the sponsor has a good idea of the role and expertise that they want the coach to perform. Avoid the *Yellow Pages* and clearly define the attributes, knowledge and personal specification of the best person to fit with the organisation and potential clients.

Recently, we visited a new potential sponsor and we agreed that a defined objective-setting and documenting process would support her in facilitating learning for clients and support the clients in making transitions. Fundamental to this was whether we would be a good fit. Personal chemistry

between client and coach is a positive indicator that progress can be made. Coaches or coaching companies cannot just be commissioned to undertake work without a personal fit with clients. Meeting initially with clients and exploring objective setting, as outlined above, is the first step in deciding whether the coaching chemistry is right or wrong. So, what does it take to be an ideal coach?

The ideal coach

Sponsors are frequently confused by the variety of coaching services on the market today. We ourselves are confused by and concerned about the workshops and accreditation schemes which can allegedly train people to become anything from life to

executive coaching experts in as short a time span as a long weekend. We believe the definition of an ideal coach includes some of the following characteristics:

- Previous personal and provable success in coaching.
- Behavioural credentials.
- Rigorous structure and soft skills.
- Well practised in process.
- Coaching the coach.
- Flexible, displaying a full variety of coaching styles.
- Documented progress.
- Client confidentiality.
- Relationship with sponsor and clients.

Previous personal and provable success in coaching

When choosing an external coach it is important to review personal success attributed to the input and facilitation

‘progress can be documented’

provided by that coach. Beware of the perception of transferability from one coaching arena to another. The transfer of expertise of coaching on the sports field to executive coaching is not to be taken as automatic. Transferability of skills from one context to another is not a given. What leads to success in sports does not equate to success in commerce or in life. Some of the processes to achieve success may be common, but the application is very different. At this stage it is important to focus on the personal success of the coach themselves. It is unlikely that a coach who has failed in their own personal relationships will be successful in helping managers develop their relationships with those who directly report to them. You would not seek financial expertise from a bankrupt, so why would you seek input from someone who had not demonstrated some measurable form of success in their own life? This issue has to be confronted. A used-car salesman attending a course on coaching is not the person with the best experience to develop managerial skills in an unrelated industry. Likewise, an athletics coach may be successful in their arena of expertise, but may not be the best person to coach a manager through their self-limiting beliefs.

Behavioural credentials

It is almost impossible to be a coach without a rigorous understanding of the behavioural sciences. Understanding and helping others learn to learn is fundamental to coaching. Without some formal academic qualification in learning and development, it is

unlikely that the coach will have the resources or the experience to do a good job. Courses generally that are assessed on attendance rather than performance such as some NLP programmes, coaching courses with dubious standing, and easily achieved accreditation are all best avoided. They are a flimsy foundation for coaching. We do question whether attendance on such programmes can be sufficient to prepare people for the rigours of coaching work. Remember, the role of the coach is to enable their client to take decisions to shape their life. These decisions will have consequences. For the uninformed, inexperienced and ill-practised, handing out an attendance certificate is tantamount to giving a child a gun as a harmless toy. The development of people through coaching is too important an issue to put in the hands of untrained amateurs, however enthusiastic they are.

Rigorous structure and soft skills

Coaching requires a firm structure which can be adapted to the client. Explaining the structure of coaching and moving from objectives to action, and then reviewing progress, has to be a cycle that the client understands. Time taken to understand the client's learning style and to explain the learning process is fundamental to their taking action and seeking feedback on their actions and the progress achieved. It concerns us that coaching is often described as a soft skill because we think this creates the wrong impression. To get the most from coaching requires the client to tap into and utilise both hard and soft skills. The hard skills refer to the structure or methodology and soft skills refer to the process of learning and change.

Well practised in process

There should be a high degree of unconscious competence on the

part of the coach, with personal ego taking a firm back seat. It is likely that the coach will have some expertise in a variety of learning styles, from the non-directive to the directive, and they may even hold a formal position in which they have this role. The confidence of the client is instantly won if they are aware that the coach has a great reputation, and has facilitated fantastic results, thus enabling their client to take ownership and act decisively.

Coaching the coach

We appreciate meeting with coaches who have their own coaches, visionary mentors, aspirants and others from whom to learn. A important attribute of coaches is that they value learning. One of the greatest assets for a coach is curiosity. Curiosity requires thinking at a different level and searching for new learning. The last thing a sponsor or client requires is a coach who has finished their quest for learning and development.

Flexible, displaying a full variety of coaching styles

We place a high value on those coaches who have the expertise to offer coaching that is content free. These coaches have the skills and the confidence to undertake projects and to focus entirely on the process, and not become influenced by the content or the key issues being resolved. The client can be secure that the confidential nature of their issues remains totally with them and that if they wish to self-disclose they may do so, but they are in control of the process. This also puts the coach in a better position and enables them to focus on helping their client address all the issues in terms of using a non-directive, but highly focused, structure.

At the same time, we value the coach who, when required, can display a more direct role and deliver a firm message, but in a caring manner and with the interests of the client uppermost.

Documented progress

This relates to the client documenting their progress. We encourage all clients to do this and, if they are comfortable, to share this with others. It may take the form of a learning log or diary. We provide structures that clients can use or adapt to their personal needs. Working through a daily log can be very powerful and can support learning, decisiveness, risk taking and development. Action plans also typify progress, and reviewing them regularly supports personal change. It is desirable to open coaching and its results up to others in the organisation who are undertaking the same progress. The sooner clients can discuss issues with others, the sooner coaching is escalated and valued as a major tool of change.

Client confidentiality

Some time ago we were working in a large organisation, focusing our energies on culture change. After we had worked with the director of that business, he said that he would like to work independently of his management team on some personal issues which would remain confidential to the coach and himself. This was agreed according to our usual practice. After several sessions the director's line manager requested that we meet to discuss the client's progress. We agreed that the meeting could take place and would focus solely on the coaching process employed, and not the specific details or personal objectives of the client. The line manager was adamant that we disclose the content of the

‘
*One of the
greatest assets
for a coach is
curiosity*
’

meetings we had with the client to ensure that it fitted with the objectives of the company. We had no choice but to curtail the project as we were not prepared to compromise client confidentiality.

Relationship with sponsor and clients

This cannot be over-emphasised. It is often an area that needs clarification. In our business we have had to outline this relationship in approximately 50 per cent of coaching interventions simply because the sponsor has either been naïve, overtrusting or just not conscious of the importance of this role and the interplay with the key actors. The sponsor of the project has to understand fully the role they have in the process, and the relationship and the rules that have to exist between the triad of coach, client and sponsor. When relationships and expectations are defined right from the start, there is no confusion later on. Also,

talking about how progress can be documented and how the client can pass on key learning throughout the organisation is a usual measure of progress and a feature of the return on the investment in coaching.

Conclusion

Coaching is and will remain a significant vehicle for bringing about positive and measured organisational change. We believe that coaching will probably be the key process in turning organisations around. Through coaching it is possible, by working with key individuals, to effect significant business improvement. It is likely that large-scale change initiatives – because of the size, the resources they devour and the time taken to implement change – will be a less desirable change process than coaching. Focusing attention on people requesting coaching it is a far more specific, targeted and precise process to bring about significant personal and business improvement. To be accurate in their predictions, organisations need to consider seriously the selection of coaches. In that way they will create a seamless and hugely positive relationship between clients, coaches and sponsors.

Philip Atkinson and **Ann Atkinson** are directors of Learning Strategies Ltd, specialising in strategic, behavioural and cultural change. Philip Atkinson is a consultant in the UK, Europe and United States, has written seven business books and published many articles, speaks at conferences and runs workshop sessions. His latest book is *How to become a Change Master: Real World Strategies for Achieving Change* (Spiro Press, 2005). Ann Atkinson works as a coach and trainer in soft skills and is a lecturer in psychology and HR at Stevenson College in Edinburgh.

- Telephone: +44 (0) 0131 346 1276
- E-mail AtkinsonConsult@aol.com
- Websites: www.philipatkinsonconsulting.com, www.learningstrategies.ltd.uk