“Beyond best practice: Developing a coaching approach for complex situations: meeting your client’s needs in challenging times”

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With thanks to as organisers

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Our Purpose

This workshop aims to provide participants with pathways for understanding complex issues in coaching. These include:

- the issues that arise within the coachee’s context,
- the coaching relationship and, within,
- the coach and the coachee themselves.

Our Perspective

- Coaching engagements are complex. The diversity of clients and their needs mean that coaches are called upon to negotiate a vast array of challenges.
- Managing this complexity requires reflective practice and a deep understanding of your own unique coaching approach and model.
- This interactive and practical workshop will help you to explore and hone your unique coaching style. It will help you to create compelling coaching engagements with your clients in these complex times.

Our Process

In this workshop participants will:

- Reflect on their own practice in the light of new understandings of core coaching concepts and models.
- Explore the critical role of reflective practice in developmental coaching and leadership
- Participants will also engage with cutting edge tools that assist both coaches and clients to assess the coaching process and its results.

Developing your own framework

- As coaches we need to build a compelling story about our professional practice. Based on three areas:
  We need:
  - A clear purpose
  - That meets the situation we face
  - A framework of underlying perspectives
  - That are capable of informing our approach
  - A respectful process for working
  - That enables us to act effectively
- We also have to make that story compelling by understanding what will appeal to clients.
- Combining your own understanding of your work and the literature on story telling provides a way to fully engage clients.

Focus on quality conversations

The quality of the conversation determines the quality of the relationship …

... and the quality of the relationships determines the quality of the system/organisation.

So what might a coaching model be like that enables quality conversations and relationships?
What sits within the framework?

What do you mean by purpose?
- Question, expectation (intention, outputs, results, learning) role, context (meaning, values and ethics), all of which create the boundaries for the work and are bounded by the system

What do you mean by perspectives?
- Beliefs (self, others, change), models (personal, interpersonal, systemic), approach to evidence or science (meaning, values and ethics)

What do you mean by process?
- What we do (what happens) when we work
  - Story Motif, Canonical story structure, Define.

What is the question that it is important for us to address here and now?
- Defining the Purpose of the work gives rise to the following types of question:
  - What is this enquiry (encounter, journey or relationship) going to be about and why?
  - What are you setting out to achieve (in terms of results, outputs or type of journey, explanation or story)?
  - What is the systemic context of the work? What sort of conversations are needed in the system?
  - What type of client Purpose is best served by your service offer?
  - What boundaries do you place on the Purpose of the work that would lead you to refer the client elsewhere? With whom would you not work and where is the margin of that boundary?
  - What definitions of yourself as a practitioner (including your sense of professional identity and role) inform your purpose?

Purpose

- Question – problems, issues, goals, solutions, that is the puzzle you seek to answer – what does this mean in a complex context?
- Expectation
  - Intention, what you, the client, others/sponsor intend as the aim of the engagement – an objective for future achievement,
  - Outputs, what will the client be doing differently, what behavioural change will the client others/sponsor recognise
  - Results, what will be different as a result of the outputs
  - Learning, what will the client, others/sponsor learn during the process of change, through the relationship, or on the journey
- Role, what role (or not) are you each going to take in this journey together – what roles exist?
- Context, what is the context which gives this journey meaning (values and ethics and also local, national and global influences)
- Boundaries, what boundaries do you place on the purpose of the work that would require you to refer the client elsewhere?

Influences on Purpose

- Local level influences (that is, belief systems, values and ethics, priorities and processes operating internally to any single employing organisation or service setting, training scheme, corporate structure or governing professional body).
- National level influences (for example, the ideology of the political party in power that informs policy development and shapes public expectation; prevailing views of the role of the professions in society and broader social, cultural and political priorities).
- Global influences (international trends in welfare or the delivery of professional services, health and social care; concerns that affect the global community).

What sits within the framework?

- What do you mean by purpose?
  - Question
  - Expectation (intention, outputs, results, learning journey)
  - Role
  - Context (meaning, values and ethics)
- All of these create the system boundaries for the work
- What defines the purpose of your work?
- What challenges do we face?
- What implications are there for our professional development?

“My purpose, your purpose” exercise

Exercise reflecting on your purpose as a coach
Dialogue in pairs on your purpose (attention)

- What assumptions sit underneath your definition?
- What do you really like/needs to be preserved about your purpose?
- What needs to change?
Two questions worth considering in purpose...

- What development is required?
- How does this integrate with wider purpose?

What are we here to do? Two types of development

Vertical Development

Accommodation
- our perspective has
to change if we are
to find a better
solution

Horizontal development

Assimilation
- integrate into existing perspective

What are we here to do?
Two types of development

Vertical Development

Our perspective
(Why we do what we
do)

Horizontal development

Skills and techniques
- How to do it

Reflecting on purpose over time

Values (Higher Order Goals)

Goals

Actions

Lack of Attention

Figure 1. Order of Hierarchical Complexity Tree. Each higher order action organizes two or more lower order actions.

Each Higher stage integrates and extends the stage below
Goal Neglect

When we begin to overlook the higher order values that shape our goal systems, the goals at lower levels become functionally superordinate & start to guide overt behaviour and actions.

Goal Neglect @ Work

Build an outstanding private bank

- Work Hard
- Deliver Excellence
- Revenue
  - Get stretch goals
  - Mentoring
  - Good enough
  - Get customers
  - Drive staff

Goal Neglect @ Home

Have a happy family life

- Kids do well at school
- Happy Marriage
- Good Income
  - Less TV
  - Play sports
  - Recreate
  - Argue lots
  - Do tasks
  - Work

Perspective: What sits within the framework?

- Beliefs (self, others, change)
- Models (personal, interpersonal, systemic)
- Meaning (library of scripts, values and ethics)
- Approach to evidence or science
- What perspectives are excluded with what implications for the story your client tries to tell? (What impact does this have on the client?)

So what is the evidence base we use now?

- If we can call upon four modes of knowledge:
  - Scientific
    - Not just the empirical (correct ways of gathering data, value free, setting free), but different forms of scientific philosophy and consequently of enquiry.
  - Technical rational
    - Beyond setting, divested of practice knowledge, evidence base? (What works agenda, manualised, best practice)
  - Reflective
    - Practice as deliberative action based on reflection within specific context. (Multiple forms)
  - Critical deconstruction
    - To challenge existing dominant stories.
- Then we can legitimately look in more detail at the stories our clients tell us and those we tell about our practice.

Adapted from Gibbons, and Scott et. al. (see Lane and Curtis, 2006)

Meaning (scripts and influence)

- Library of accepted scripts
  - What are scripts?
  - Whose scripts?
  - Why scripts?
    - Meaning as part of a script
    - Scripts provide guidance
    - Scripts provide boundaries
  - Where do scripts come from?
    - For you
    - For the client
    - For significant others (individuals, groups, entities)

Levels of influence

Local influences (that is, belief systems, values, ethics, priorities and processes operating internally to any single employing organisation or service setting, training scheme, corporate structure or governing professional body).

National influences (for example, the ideology of the political party in power that informs policy development and shapes public expectation; the state of the economy; broader social, cultural and political priorities and the prevailing views of human nature dominant within society).

Global influences (international trends in welfare or the delivery of health and social care; concerns affecting the global community including wider social, political and economic factors).
Perspectives on change

- **SYSTEMIC**
- **INTERPERSONAL**
- **PERSONAL**

- You and Me
- Interpersonal process
- Multiple worlds
- Discourse/narrative subject as a position within a discourse
- Eco-systemic
- You and me – multiple selves vary by context

**Why is a systems perspective important?**

- To understand the critical importance of a systems perspective we need to understand complex adaptive systems.

So let's make some systems......

**Features of CAS...**

- Complex systems are non linear
- Emergence
  - Behaviour
  - Roles
  - Processes
  - Belonging
  - Satisfaction

**Working in complex systems**

- Person
  - Unique goals
  - Experience
  - Beliefs etc

- Person
  - Unique goals
  - Experience
  - Beliefs etc

- Person
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- Person
  - Unique goals
  - Experience
  - Beliefs etc

**Implications for Coaching: Two Key Points**

- If we can't always stand outside the system and pull the levers of change with predictable results, what do we do?
  - Help create the conditions that allow successful outcomes to emerge.
- The nature and quality of the conversations in the person/team/organisation are critical.
  - Motivating people is more about listening than telling.
  - It requires ongoing, iterative conversation
  - Creating healthy conversations creates positive attractors and stimulate positive behaviours.

**Systems create/occupy multiple spaces.**

![The Stacey Agreement/Certainty Matrix](image)
Model of leadership for complexity

This model focuses on the leader's ability to manage complex perspectives.

Great leaders and coaches:
1. Have purpose - they are going somewhere.
2. Take bigger perspectives on what is happening
4. Create positive “emotional spaces” – create effective processes that engage

Perspective Taking Complexity (PTC):

“A leader’s capacity to understand, critically consider and integrate and extend conflicting information and multiple competing perspectives to guide their actions”
(Cavanagh, Atkins, Grant, Spence, 2006)

PTC is not enough – we need self regulation:

Mindfulness.
- The ability to be able to observe the present moment dispassionately
- See our own process and respond intentionally rather than react.
- The ability to create the moment of choice

And we need a process that is capable of making the journey.
- That has the ability to be both supportive and challenging
- That enables positive conditions for emergence

The positive role of tension and challenge...

Scaffolded support to reach further

- Engage with the tensions - Integrate and extend!
- Tension and paradox may create the need to change our perspective, but support creates the possibility of change
- Two types of developmental intervention: Challenge and support
  1. Challenge - Questions that highlight tension and paradox
  2. Support - Genuine understanding of what is positive in the person's perspective now!

Two types of development

Vertical Development

Horizontal development

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How do we coach in systems?

The quality of the conversation determines the quality of the relationships and the quality of the relationships determines the quality of the system.

So what coaching process would help to create a good system?

Process:
What sits within the framework?

What process do you use?

- What we do (what happens – what potential if facilitated)
- Many roads can lead to Rome
  - Sometimes linear, often non linear
    - Empirical/linear Story
    - Emergent Story
    - Structured Story

Matching Process to Context operating in different spaces – creating stories that fit

Empirical, Emergent or Structured Stories

- Empirical works from an existing evidence base or hypothesis testing framework
  - It assumes a cause/effect and linear process
  - It works from the clients story but views that as an example of an existing stock of stories which can be informed by an evidence base
  - Most appropriate in the rational space – agreed and predictable
Empirical, Emergent or Structured Stories

- Structured Story works from the top down
  - Provides boundaries using predetermined lenses to organise the story
  - Helps hold anxiety so that we can work with the context
  - Most appropriate in chaotic contexts

- Emergent Story works from the ground up
  - Looks for what themes emerge in the conversation and what we notice.
  - Uses tension and anxiety creatively
  - Most appropriate in the space of ambiguity on the edge of chaos

Eight principles of working in emergent spaces

1. The quality of the conversations determines the quality of the organisation.
2. Anxiety needs to be managed, not removed:
3. Build trust – or spend lots of time managing unnecessary anxiety
4. Celebrate diversity – it is where creativity comes from
5. You can't control the system - so stop trying to.
6. You still have to act!
7. Quality of action not judged by outcome. An action is good because:
   - It fits with the demands of the environment
   - It is fundamentally moral and ethical in nature.
8. Strategy itself is emergent - it is an ongoing, iterative, conversation.

What are the implications of today's work for our professional development?

- Asking this question frequently:
  - What are you setting out to achieve when you practice?
  - What is a relationship with you going to be about and why?
  - What is the context in which you work best? What sort of conversations happen in that context?
  - What boundaries do you place on the Purpose of the work that would lead you to refer the client elsewhere?
  - What definitions of yourself as a practitioner (including your sense of professional identity and role) inform your practice?
  - What are the CPD implications of working with clients, in teams, within contexts shaped by local, national and global influences?

Working with the stories we tell and enabling our clients to tell their stories

- We can work with our clients to re-vision:
  - Our purpose – what we agree with our client as the purpose of the encounter between us – where are we going and why (negotiated identity)
  - Our perspective – what informs our work – what perspectives can inform the journey we agree to undertake (what evidence can we use)
  - Our process – what happens when we work – what different processes are most appropriate given our purpose and the perspectives that inform it in order to most effectively undertake our journey.
  - So as long as we see science as it is currently practised and recognise that to be professional involves more than technical application but includes emerging identify – we have a version of professionalism that moves beyond applying research/techniques to practice towards creating a compelling story based on negotiated practice.

What makes a good story.....

- They have an appeal to, or in some way resonate with those who seek our services, are thought-provoking and generate curiosity.
  - So how does it (do you) provoke thought and curiosity in staff, clients/customers, peers, managers (stakeholders)?
- They are richer in the connections they make between individuals and contexts.
  - How does it (do you) help individuals make richer connections between ideas, each other and in broader contexts?
- They challenge stereotyping or self-perpetuating labels.
  - What stereotypes might it be (are you) promoting or disputing? What ideas are self-perpetuating and how do these help or hinder change?
What makes a good story.....

- They assume evolution, change and progress are possible.
  - So does it (do you) assume change is possible or dismiss it? What is it telling others about the possibility of change?
- They conceptualise individuals connected to the story as active, competent, responsible and reflexive.
  - How is it (are you) helping others to feel that they are actively involved, responsible and able to reflect and ask awkward questions?
- The key ‘character’ in the story has a positive moral or ethical code (tightly or loosely defined) and their actions are consistent with this.
  - What assumptions about character is it (are you) making?

Adapted from Sluzki’s (1998)

What makes your story worth telling?

Final Challenges (Your story as a practitioner)

- What stories do we tell?
  - Who owns the story – does it own us?
- What do our stories do?
  - Does the story meet the context?
  - Can we tolerate the uncertainty of emergent stories?
- Stories within stories
  - Are some invisible even to us?
- Be careful not to ‘strip the storyteller of the story’ (Gergen & Davis, 2003; p.241)

Being responsible for the stories we tell

Questions for reflection.....

- Do I hold a story as a professional, and if so how?
  - How does your story fit within emerging local, national and global themes?
  - Is there a need for an explicit process?
  - How do you gather evidence for the story?
  - What implicit contracts are associated with your stories?
- And it needs to conform with cultural story telling traditions to be compelling

And remember, there are no predetermined destinations but thank you for taking this journey with us.

Summary

- A model can assist with telling more effective practice stories:
  - But you need to be clear on your
    - Purpose
    - Perspectives
    - Process
  - And it needs to conform with cultural story telling traditions to be compelling

Professional Development Foundation

PDF International programmes for coaches

- WABC Chartered Business Coach – individualised programme for those with five years experience who have a business and coaching background.
- EMCC Master Coach – individualised programme for those with five years experience in coaching.
- Masters Degree - for experienced coaches.
- EMCC Practitioner Coach - (Postgraduate Certificate) for coaches with 2 years experience.
- Doctorate - for experienced coaches.

References, further reading

Key texts:
- Modern Scientist-Practitioner, a guide to practice in psychology, 2006, Lane and Corrie, Routledge – explores your identity as a professional so you can create more effective stories about practice
- Constructing Stories, Telling Tales – a guide to formulation in applied psychology (Corrie and Lane, 2002), Karnac Books - explores how we can understand our own and clients stories
  - The Case for Coaching, 2006, Jarvis, Lane and Fillery-Travis, CIPD – explores the evidence base for coaching, literature, surveys, cases
  - The Art of Inspired Living, Corrie, 2009, Karnac Books – explores tools you and your clients can use in coaching from positive psychology – how they can build their own story
  - Integrated Experiential learning, Lloyd Chapman, 2010, Karnac
  - WABC Chartered Business Coach
  - EMCC Master Coach – individualised programme for those with five years experience in coaching.
  - Masters Degree - for experienced coaches.
  - EMCC Practitioner Coach - (Postgraduate Certificate) for coaches with 2 years experience.
  - Doctorate - for experienced coaches.

Research, Consult. Educate

Research
Do you want to use research and evaluation to build better understanding of the issues you face?

Consult
Do you want to use external consulting expertise that helps you build your strengths?

Educate
Do you want to create learning and development systems that deliver changed behaviour for measured client benefit?

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