CHAPTER 6

An Integrative Goal-Focused Approach to Executive Coaching

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THIS CHAPTER DRAWS on the goal-setting, self-determination, and personality literature from the behavioral sciences and presents an evidence-based, integrative goal-focused approach to executive and workplace coaching, and then relates that approach to the two case studies presented in previous chapters. The process of coaching is essentially about helping individuals regulate and direct their interpersonal and intrapersonal resources to better attain their goals. Such self-regulation has a long and well-researched history in psychology (Bandura, 1982; Collier, 1957). Indeed, Carver and Scheier (1998) argue that all human behavior (here behavior is broadly defined to include cognitions, emotions, and actions) is a continual process of moving toward or away from mental goal representations, and that this movement occurs by a process of feedback control.

The core constructs of goal-directed self-regulation are a series of processes in which the individual sets a goal, develops a plan of action, begins action, monitors their performance, evaluates their performance by comparison to a standard, and based on this evaluation changes their actions to further enhance their performance and better reach their goals. In relation to coaching, the coach's role is to facilitate the coachee's movement through the self-regulatory cycle. Figure 6.1 depicts a generic model of self-regulation.

In practice, the steps in the self-regulatory cycle are not discrete, or with clearly separate stages; rather, there is significant overlap between each stage. Coaching in each stage should aim to facilitate the process of the next. For example, goal setting should be done in such a way as to

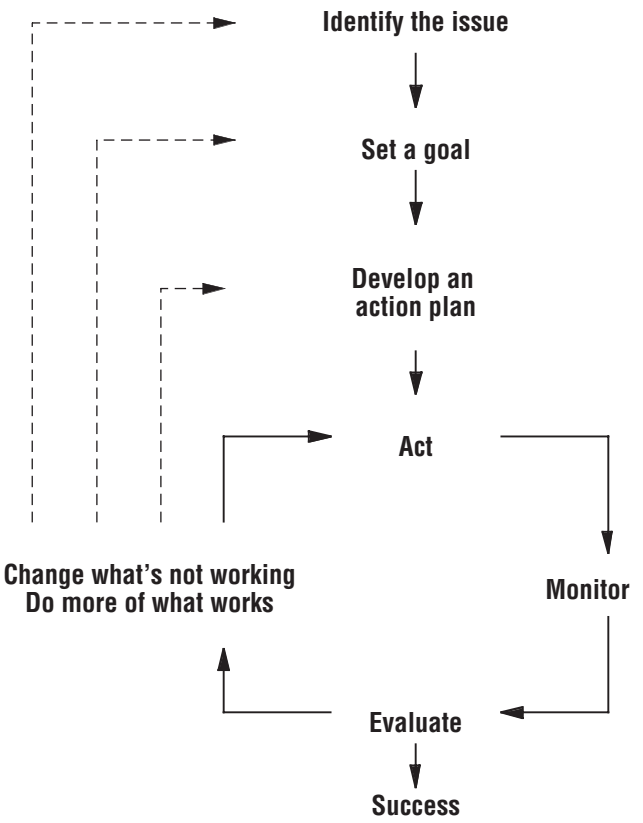

Figure 6.1
Generic Model of Goal-Directed Self-Regulation

facilitate the implementation of an action plan; the action plan should be designed to motivate the individual into action, and should incorporate means of monitoring and evaluating performance in addition to incorporating regular follow-up coaching sessions.

ISSUES RELATED TO BEHAVIORAL SELF-MONITORING

The monitoring and evaluation of actions as the coachee moves through the cycle is a vital part of the coaching process. This may seem like a self-evident point; however, people are often not skilled in the self-reflective process, and are frequently unaware of their behavior or the impact their behavior has on other people (Jordan & Troth, 2002). Thus the coach needs to ensure that action plans focus on observable concrete behaviors that are clearly discernable to the coachee.

The exact means of monitoring will, of course, vary according to the coachee's goal. Some behaviors will be easier to monitor than others. Exercise or activity-based actions can be relatively straightforward to monitor. Interpersonal skills in the workplace may be more difficult, and the coach and coachee may have to be quite creative in devising means of monitoring and evaluating. One technique may be for coachees to self-reflect after a meeting and take some time to rate themselves on their interpersonal skills. Such ratings could include counting the number of open-ended questions they asked during the meeting or rating their awareness of the other person's feelings, and these ratings should be written down. Such self-monitoring is invaluable in coaching.

Issues Related to Self-Reflection

Self-monitoring and self-evaluation are metacognitive processes, metacognition being the process of thinking about one's thoughts, feelings, and behaviors. In relation to the self-regulatory cycle, focusing attention on the self allows individuals to better access the internalized mental representations of the standards and reference values by which they evaluate their performance. Indeed, higher levels of self-awareness were found to be related to sales performance for salespersons for whom sales were important (Hollenbeck & Brief, 1987), and Church (1997) found that high-performing managers were significantly more self-aware than low-performing managers.

The development of an individual's self-awareness through coaching may be particularly important when coaching is directed at enhancing interpersonal skills, for example in leadership coaching or sales coaching. This is because the development of leadership skills may well be limited by low self-awareness (Bar-On & Handley, 1999; Goleman, 1995). Further, individuals with high levels of self-awareness appear to hold more functional (i.e., stable and internal) attributions for success than individuals low in self-awareness (Briere & Vallerand, 1990), and they tend to be less negatively affected by negative feedback (Doherty & Schlenker, 1991).

However, high levels of self-awareness may be also associated with psychopathological rumination and depression (Trapnell & Campbell, 1999). Indeed, in evaluating the impact of life coaching on self-reflection and insight, Grant (2003) found that higher levels of self-reflection were inversely related to goal attainment, and suggested that an overemphasis on self-reflection may actually be counterproductive in the coaching process.

Given the importance of these metacognitive processes and their relation to goal attainment, coaches need to be attuned to the coachee's abilities

in these areas, and this is particularly the case in developmental coaching that focuses on intra- and interpersonal issues.

A SOLUTIONS FOCUS

Coaching is a goal-oriented, solution-focused process in which the coach works with the coachee to help identify and construct possible solutions, delineate a range of goals and options, and then facilitate the development and enactment of action plans to achieve those goals.

Solution-focused approaches have their roots in Milton H. Erickson's approach to strategic therapy. Solution-focused approaches have been found to be effective in a range of issues including organizational change (Bloor & Pearson, 2004) and life coaching (Grant, 2003).

The emphasis on solution construction in preference to problem analysis, as well as the use of positive, nonpathological language are important in goal-focused coaching. The use of pathology-laden terminology and a clinical medical model can be unhelpful (de Shazer & Lipchik, 1984; Drewery & Winslade, 1997), and may even contribute to the creation and maintenance of problem behaviors (Walter & Peller, 1996).

This is not to say that a solution-focused approach eschews or ignores the existence of problems. To do so may well alienate clients who need to talk about their problems. Having the time and space to talk about distressing or worrisome issues can be a cathartic experience, and in doing so clients often develop clarity and insight. Indeed, as will be discussed, an understanding of the psychosocial dynamics that create or sustain the problem can be invaluable in creating a case conceptualization and then using such information to raise the coachee's awareness of the issues and develop solution-focused action plans.

The coach's skills lie in helping the coachees tell their problem story in a way that reframes the presenting problem as being solvable and highlights the client's resources and ability to define and move toward a solution, while at the same time building a collaborative relationship in which the coach has permission to hold the client accountable for proposed action steps. At its best, the solution-focused approach enables people to access and use the wealth of personal experience, skills, expertise, and intuition that resides within all of us. It allows coachees to find individualized and creative solutions to the issues and concerns that face them.

ATTENTIONAL FOCUS AND LANGUAGE

Central to the solution-focused approach is the coach's ability to help the client purposefully focus attention toward possible solutions. Such

mindfulness is frequently effortful for the client. In many respects it is easier to discuss and analyze existing problems than to shift attention toward developing responsibility and personal action.

The inability to purposefully focus on desired goals and action steps is associated with negative outcomes such as procrastination (Ferrari, 2000); anxiety (Mansell, 2000); poor task performance (Norris, Lee, Cea, & Burshteyn, 1998); and hypochondriasis (Cavanagh & Franklin, 2001), whereas a strong metal focus on one's goals is associated with goal attainment and enhanced performance and enjoyment (Lee, Sheldon, & Turban, 2003).

Indeed, as we direct attentional recourses, what we focus on tends to grow increasing salient. We have all experienced lying in bed late at night listening to a dripping tap that seems to grow louder and louder. Similarly, in coaching, if we overly focus on problems we tend to perceive them as increasing in complexity and urgency. Conversely, if we train ourselves to be vigilant and on the lookout for solutions, we tend to find them (Elliot & Harackiewicz, 1996).

Thus, the coach's role is to find ways to direct the coachee's attention toward solutions, and to foster the emergence and development of a solution-focused mind-set. There are two key interrelated factors in this process: (1) *changing the viewing*—that is, helping the coachee to perceive the issues in a new, more useful way, and (2) *changing the doing*—that is, helping the coachee to develop behavioral change.

Changing the viewing involves at least five things: (1) detailing the preferred outcome, (2) identifying exceptions to the problem, (3) amplifying existing resources, (4) building coachee self-efficacy, and (5) acknowledging the progress made so far.

Changing the doing also involves at least five things: (1) acknowledging possibilities by turning presenting problems into platforms for solution construction, (2) asking "how" questions instead of "why" questions, (3) generating client-congruent multiple options, (4) using small specific doable action steps, and (5) finding ways to leverage systems to facilitate individual change.

Central to these notions is the skillful use of language. The coach needs to be able to reflect and reframe the coachee's statements in a way that creates new ways of viewing and doing. Following are some examples of solution-focused language:

- *Language that highlights exceptions.* Coachee: "I really hate what I'm doing." Coach: " I hear what you're saying. . . . Which parts of your job are less unpleasant for you?"
- *Language that acknowledges possibilities.* Coachee: "I just can't connect with those clients." Coach: "So, up till now you haven't found

a point of contact. I wonder what they are really looking for in their dealings with you?"

- *Language that clarifies goals.* Coachee: "I really want to improve my leadership skills." Coach: "So, what does good leadership mean to you?"
- *Language that moves them forward and creates options.* Coachee: "I just don't feel like I'm getting anywhere with this. . . . I feel really lost." Coach: "So, you'd like to get back a sense of direction? What would give you that?"
- *Language that rolls with resistance.* Coachee: "But I couldn't do all of that . . ." Coach: "So which bits could you do?"
- *Language that fosters a systems perspective.* Coachee: "I guess I just am really not up to this." Coach: "I wonder who would be most surprised to hear you say that?"
- *The preferred outcome.* Coach: "Imagine that you went to bed tonight, and when you woke up the problem had somehow magically disappeared, and the solution was present . . . but you didn't know that the solution had arrived. What is the first thing that you'd notice that would tell you that the solution was present?" Alternatively, "If things were going well, what would be different?"

The coach's ability to use such often quite challenging language will be related to the quality of the collaborative nature of the coaching relationship and to the degree to which the coach is able to hold the coachee accountable. These factors are in turn related to the goals of the coaching relationship.

GOAL SETTING: THE "HOW" OF GOALS

Goal setting is the foundation of successful self-regulation and effective coaching. There is a voluminous literature on goal setting that can usefully inform the coaching process (Rawsthorne & Elliot, 1999).

Commitment to goals is critical (Hollenbeck & Brief, 1987), and high commitment is attained when the goal is perceived as being attainable and important, or when the individual participates in determining outcomes. Goal setting is most effective when there is feedback showing progress in relation to the goal, and goals stimulate planning in general. Often the planning quality is higher than that which occurs without goals. Furthermore, the effects of goal setting can be long-lasting. For example, managers' goals for the number of levels of future promotion have been found to be a significant predictor of the number of promotions received over a 25-year time span (Howard & Bray, 1988).

Goal setting is a necessary but not sufficient part of the coaching process—plans must be developed and enacted. Action planning is the process of developing a systematic means of attaining goals. Vande-Walle, Brown, Cron, and Slocum (1999) found that systematic action planning was associated with sales performance, and good action planning is particularly important for individuals who have low self-regulatory skills (Kirschenbaum, Humphrey, & Malett, 1981). The coach's role in the action planning stage is to develop the coachee's ability to create a realistic and workable plan of action.

One key outcome of successful action planning is the facilitation of the coachee's transition from a *deliberative* mind-set to an *implementational* mind-set (Gollwitzer, 1996; Heckhausen & Gollwitzer, 1987). The deliberative mind-set is characterized by a careful weighing of the pros and cons of action and a careful examination of competing goals or courses of action (Carver & Scheier, 1998). The implementational mind-set is engaged once the decision to act has been made. This mind-set has a determined, focused quality, and is biased in favor of thinking about success rather than failure.

The shift from the deliberative to the implementational mind-set is important, not least because individuals in implementation tend to perceive themselves as being in control of their outcomes (Gollwitzer & Kinney, 1989) and experience a positive and optimistic view of their chances of success (Taylor & Gollwitzer, 1996). Such cognitions themselves are associated with higher levels of self-efficacy, self-regulation, and goal attainment (Bandura, 1982).

The Multifaceted Nature of Goals

Goals are not a monolithic construct. In coaching it may be useful to distinguish among different types of goals such as outcome, distal and proximal goals, approach and avoidance goals, performance and learning goals, higher- and lower-order goals, and the actual concrete results that the coachee achieves. These are important distinctions as different types of goals differently impact a coachee's performance and experience of the goal-striving process.

The time framing of goals is an important part of the goal-setting process, and can influence the coachee's perception of the attainability of the goal (Karniol & Ross, 1996). *Distal* goals refer to longer-term goals, and can be understood as being akin to the broad vision statements often referred to in business or management literature. Distal goals, which are experienced as being more abstract, fuzzy visions of the future, rather than concrete goals that are specifically defined, allow

for greater flexibility in the development of action planning strategies (Khan & Quaddus, 2004) and can be more motivating than proximal goals. *Proximal* goals are shorter-term than distal goals, can stimulate more detailed planning than distal goals (Manderlink & Harackiewicz, 1984), and are important tools in action planing. In essence, the action steps derived in the coaching session are a series of proximal goals. Combining both distal and proximal goals into the coaching process can lead to enhanced strategy development and better long-term performance (Weldon & Yun, 2000).

Most coaching programs explicitly focus on setting *outcome* goals, which are frequently a straightforward statement of some desired outcome (Hudson, 1999)—for example, "to increase sales of widgets by 15 percent in the next three months." This is a useful approach, because for individuals who are committed and have the necessary ability and knowledge, outcome goals that are difficult and are specifically and explicitly defined allow performance to be precisely regulated, and thus lead to high performance (Locke, 1996). Indeed, many coaching programs focus on the setting of SMART goals (specific and stretching, measurable, achievable or attractive and agreed, realistic, and time framed), and this approach is supported by some of the goal-setting literature (Locke & Latham, 2002).

However, there are times when overly specific goals will actually alienate the coachee, and may lead to a decline in performance (Winters & Latham, 1996). For individuals who are in a highly deliberative mindset or in a contemplation stage of change, it may be more useful to purposefully set more *abstract* or quite vague goals and focus on developing a broad, fuzzy vision, rather than drilling down into specific details and setting more *concrete* goals. For individuals at this point in the change process, vague goals are often perceived as being less threatening and less demanding (Dweck, 1986).

Goals can be considered as being ordered hierarchically, with concrete specific goals being subsumed under *higher-order* and broader, more abstract goals (Chulef, Read, & Walsh, 2001) in a fashion similar to the "Big Five" (openness, conscientiousness, agreeableness, extraversion, and neuroticism) personality traits and the lower order facet scales of actions (for openness), order (for conscientiousness), trust (for agreeableness), and anxiety (for neuroticism) (Costa & McCrae, 1992). Hence, abstract goals such as "to be a great leader" can be understood as being vertically higher than the *lower-order* and more specific goal "to increase business profits by 25 percent in the next quarter," and there is some empirical support for this notion (Chulef, Read, & Walsh, 2001; Oishi, Schimmack, Diener, & Suh, 1998).

Coaches also need to be attuned to the existence of *competing* or *conflicting* goals whereby pursuit of one goal interferes with the pursuit of another goal. Sometimes goal conflict is relatively easy to identify as in the two goals "to spend more time with my family" and "to put more time into work in order to get a promotion." However, the conflict between goals may not always be immediately apparent. For example, the goal "to get my sales force to sell more widgets each week" may be in perceived conflict with the goal "to have a more hands-off and people-centered leadership style," if the coachee finds delegation difficult and is used to a more controlling management style.

In terms of hierarchy, the goal "to have a more hands-off and people centered leadership style" can be considered to be a higher order goal than the goal "to get my sales force to sell more widgets each week". These two goals are also in conflict. The skill of the coach here is to help the coachee find ways to align seemingly conflicting goals both vertically (between higher and lower order goals as in this example), and also horizontally. An example of vertical alignment in this case would be to find a way that the coachee could develop a more hands-off people centered style of a type that motivates the sales force to sell more widgets. Such congruence is important in facilitating both goal attainment and well-being (Sheldon & Kasser, 1995).

Avoidance goals are expressed as a movement away from an undesirable state, for example, "to be less stressed about work." Such a goal does not provide a specific outcome target. There is a wide range of behaviors that might be associated with such a goal. In contrast, an *approach* goal is expressed as a movement toward a specific state or objective—for example, "to enjoy a fulfilling balance between work demands and personal relaxation." Not surprisingly, it appears that there are important differences in self-evaluation and personal well-being that are related to the propensity to set either avoidance or approach goals.

Coats, Janoff-Bulman, and Alpert (1996) found that people who tended to set avoidance goals had higher levels of depression and lower levels of well-being. Other studies have found that the long-term pursuit of avoidance goals is associated with decreases in well-being (Elliot, Sheldon, & Church, 1997), and that approach goals are associated with both higher levels of academic performance and increased well-being (Elliot & McGregor, 2001).

Performance goals focus on the doing. These are often experienced as being competitive, that is, to perform really well on a specific task and to receive a favorable evaluation from others. Such goals tend to focus the coachee on issues of personal ability (Gresham, Evans, & Elliot, 1988). An example of a performance goal in executive or workplace coaching might

be "to upgrade the widget sales process to best-practice standards." Performance goals can be very powerful motivators, especially where the individual experiences success early in the goal-attainment process. However, performance goals can actually impede performance, particularly when the task is very complex or the goal is perceived as highly challenging and the individual is not skilled or is low in self-efficacy. Furthermore, in highly competitive situations or when there are very high stakes, performance goals can foster cheating and a reluctance to cooperate with peers (Midgley, Kaplan, & Middleton, 2001).

In such cases *learning* goals may better facilitate task performance (Seijts & Latham, 2001). Learning goals (sometimes referred to as mastery goals) focus on the learning associated with task mastery, rather than the performance of the task. An example of a learning goal in executive or workplace coaching might be "research current best practice in widget sales processes and learn how to implement to best practice standards." Learning goals tend to be associated with a range of positive processes including perception of a complex task as a positive challenge rather than a threat; greater absorption in actual task performance (Deci & Ryan, 2002); and enhanced memory and well-being (Linnenbrink, Ryan, & Pintrich, 1999). Furthermore, individual performance is enhanced in highly complex situations when team goals are framed as being learning goals (Kristof-Brown & Stevens, 2001). One benefit of setting learning goals is that they tend to be associated with higher levels of intrinsic motivation, which in turn is associated with performance (Sarrazin, Vallerand, Guillet, Pelletier, & Cury, 2002).

Although the differences in the articulation of these different types of goals may appear to be minor or merely semantic, in fact the way a goal is expressed is very important (Rawsthorne & Elliot, 1999), and coaches need to be finally attuned to such nuances if they are to work effectively with their clients.

The key issue for coaches is one of informed flexibility in goal setting. For example, in the right circumstances, coupling learning goals with approach and performance goals creates a powerful synergy that can enhance performance, learning, and intrinsic motivation (Pintrich, 2000), and thus lead to both goal attainment and increased well-being.

SELF-CONCORDANT GOALS: THE "WHY" OF GOAL-FOCUSED COACHING

Understanding the why of goal setting is also important in coaching. Goals that are self-congruent and in alignment with the coachee's core personal values or developing interests are more likely to be engaging

and associated with a willingness to make greater effort. Self-concordance theory (Sheldon & Elliot, 1998) offers the goal-focused coach a useful framework from which to understand and work with the reasons and motivations underpinning goal selection and goal strivings.

Self-concordance refers to the degree to which a goal is aligned with an individual's enduring intrinsic or identified interests, motivations, and values. This is a simple but very powerful framework for understanding the values related to goal setting. Derived from self-determination theory (Deci & Ryan, 1980), the self-concordance model emphasizes the extent to which individuals perceive their goals as being determined by their authentic selves, rather than compelled by external or introjected forces. Underpinning self-determination theory is the notion that people have psychological needs that arise as a function of the complexity of the human organism. The self is conceptualized as an enduring and relatively stable mental construction that has the ability to direct behavior in such a way as to satisfy such organic needs (Sheldon & Elliot, 1999).

The self-concordance approach delineates the perceived locus of causality (PLOC; see Figure 6.2) as varying on a continuum from controlled (external) factors to internal (autonomous) facets. It is important to note that it is the individual's perception of the locus of causality that is the key issue in determining the extent to which the goals are deemed to be self-integrated and where they sit on the external-internal continuum.

As Sheldon and Kasser (1998) note, external motivation is experienced by the individual as behavior that is caused by factors outside of the self. External motivation is where the individual strives to attain some kind of payoff such as money, awards, or approval from others and would probably not strive for this goal without these kinds of external rewards. Introjected motivations are characterized by anxiety and guilt, with the individuals feeling coerced by their own internal sanctions. Such goals may be talked about by the coachee in terms of "should" or "ought to."

In contrast, internal facets are enduring motivations that are perceived as being internally determined and are experienced as emanating from self-directed choices; coachees feel as if they really "own" the goal and that the goal is personal. Autonomous facets can be either intrinsic or identified.

Intrinsically motivated behavior stems from the individual's core values, and is naturally enjoyable, engaging, and self-integrated. These kinds of goals are pursued "for the love of it," and such goals and the strivings associated with them are highly rewarding in themselves. Identified motivation stems from personal conviction and developing interests; the individual has thought about the goal, and although this

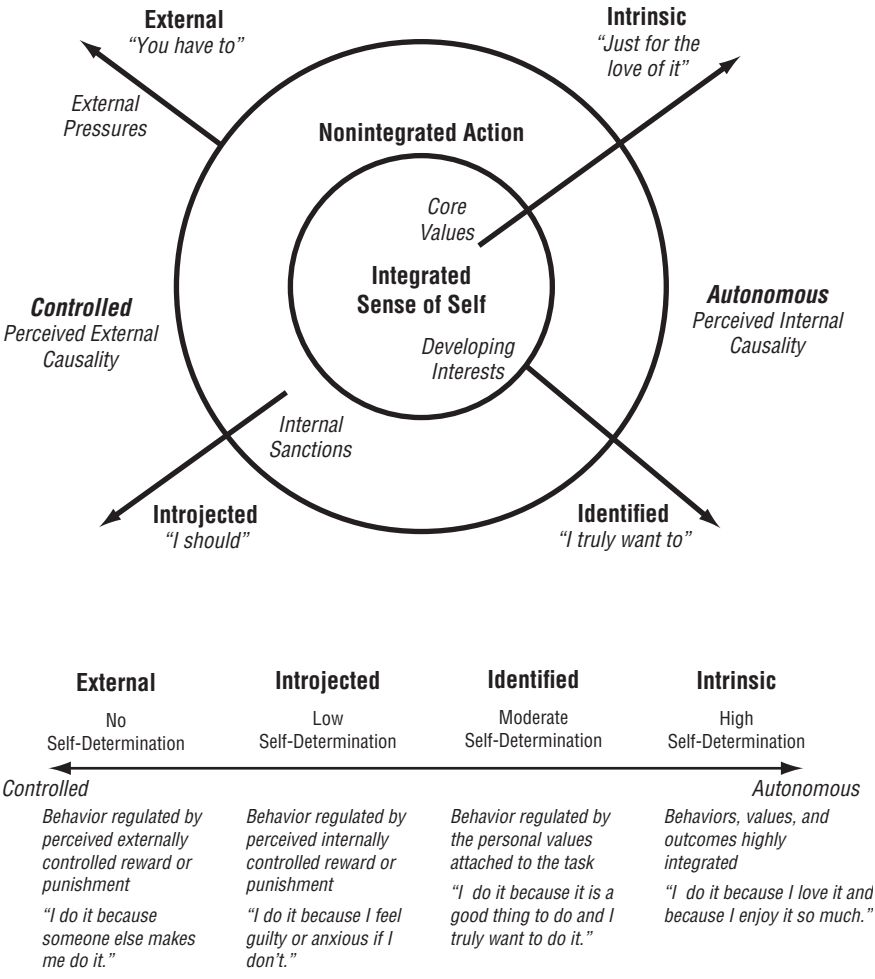

Figure 6.2
Perceived Locus of Causality Model

goal and associated values may have originated from other people, the individual now wholeheartedly agrees with it, endorses it, and personally values it highly.

The fact that the external-internal causal dimension is not objective but is in relation to the coachee's perception is an important point for coaches. The goal "to sell 1,000 widgets this month" may be a goal set by a sales manager and not the coachee. However, if the coachee loves to interact with customers and finds great personal satisfaction in selling widgets, then this goal will be experienced as being congruent with

his or her sense of self, and thus would be internal or identified. Conversely, if the coachee's primary reason for striving to reach the goal is some external reward (e.g., financial) or introjected (e.g., shame or guilt), then the perceived causality falls outside of the coachee's sense of self and there is an external perceived locus of causality.

The external-internal dimension has been found to have an important impact on goal striving, effort, well-being, and satisfaction with goal outcomes (Sheldon & Kasser, 1995) Self-concordance correlates with positive concurrent well-being, and also with sustained effort over time; individuals who strive toward self-concordant goals tend to try harder and for a longer period, leading to an increased chance of goal attainment. In addition, self-concordance makes goals more satisfying when they are attained (Sheldon & Elliot, 1999), and this kind of goal-related satisfaction may be an important motivational reference point when the coachee starts striving toward another goal. Furthermore, and of relevance to coaches working in a global context, the relationship between well-being and the pursuit of self-concordance goals is robust cross-culturally (Sheldon et al., 2004).

Self-Concordant Goal Alignment

Given these issues, it is important that coachees' goals are as self-congruent as possible, and in the coaching process coaches may need to play an active role in helping their coachees align goals in order to make them personal and congruent. There are at least four factors that may influence successful goal alignment.

First, coachees need to be able to identify the enduring and authentic from transitory or superficial whims or desires, thereby more effectively focusing their efforts. Second, coachees need to be able to distinguish between goals that represent their own interests and goals that represent the interests of others, what Sheldon (2002) refers to as "me" and "not-me." This requires a high level of personal awareness. Given that levels of self-awareness and insight vary greatly (Church, 1997), this may not be easy for some coachees. Third, the goal content needs to be expressed in a way that facilitates the alignment of the goal with the coachee's internal needs and values. Fourthly, the coach needs to have the ability to recognize when a goal is not self-concordant, and then be able to relanguage and reframe the goal so that it does tap into the coachee's more internal needs and values.

Relanguaging and reframing are core coaching skills. An effective coach needs to be able to reflect and reframe the coachee's responses in order to create different ways of looking at the issues and thus develop different ways of behaving.

In the case of reframing the externally perceived goal "to sell 1,000 widgets this month," the coach first has to recognize that the goal has been perceived by the coachee as external and not self-concordant. The coach then has to raise this issue with the coachee—the principle of awareness. The coach may say something along the lines of "I get the feeling that this is not a really exciting or fun goal for you. It seems as this has been pretty much foisted on you. I wonder if there is some way we could make this really work for you."

The coach then needs to help the coachee identify and articulate what is really important for the individual and then find a way for the coachee to align those authentic intrinsic needs with the goal. The questions coaches would ask of themselves would be "What is this person really looking for here? What are his needs and values? How can we crystallize these into actionable steps?"

The coach might ask the coachee a question along the lines of "Can I ask you a question here . . . what is really important to you? What are the nonnegotiables in your life?" In response the coachee might state that he places great intrinsic value on providing for his family. The coach's task is then to find a way of aligning the sales goal with the coachee's intrinsic motivations. The coach could ask, "If you were to reach this sales goal, what would that give you that you could pass on to your family?," and this might sometimes be effective.

However, the first difficulty in this process is to set up a series of subgoals that bridge the gap between the higher-order intrinsic goal and the lower-order sales goal, and the coach will need to beware of trying to reframe the goal too quickly and stretching the link between higher-order and lower-order goals too much, too soon. If this process is not paced well, rapport will be broken. A better question might be to simply ask the coachee a question such as "I wonder how you could link the sales goal to those things that are really important to you?" and then to help the coachee figure it out.

The second difficulty is to find a way once the link has been made that the coachee can monitor and evaluate progress through subgoals toward the higher-order goal and make those monitoring processes meaningful. The subgoals need to be quite concrete, as overly abstract goals may result in derailment. For example, the coachee could break down the overall sales target into a series of subgoals and relate the attainment of each subgoal to some specific facet of family life. The identification of these factors should be primarily generated by the coachee, as this process can easily sound superficial and trite and in itself become an external or introjected process if there is too much direction from the coach.

The third difficulty is in making the attainment of the subgoals re-

warding and enjoyable. Here the coach and coachee need to be creative and brainstorm options.

Finally, the fourth difficulty is helping the coachee stay on track, continue to work toward the main goal, and remain enthused over time. One way to do this is to extend the alignment process to include specific personality traits. Figure 6.3 shows an integrative model of goal-focused coaching.

Personality Style-Goal Alignment

The goal alignment process is profoundly personal. In addition to working with the external-internal dimension, an understanding of some key personality dimensions may be useful to the coach in maximizing coachee-goal alignment. Knowledge of common personality traits can be very useful to alerting the coach to possible derailers and frequently can provide a useful point of reference in aligning the goals to the client's needs; this approach is particularly useful in coaching the more challenging client. Hogan and Hogan (2001) draw on established clinical and psychiatric models of personality disorders, and present a dimensional model of personality traits in which personality lies on a continuum from "personality-disordered" to "healthy expressions of personality style."

Each of these personality styles has specific behavioral, emotional, and cognitive traits, and each has some quite specific needs that drive behavior. For each style, there will be a way to frame the goal that will be appealing

Figure 6.3
An Integrative Model of Goals

to the client, and there will be other ways of framing the goal that will alienate or at least be disinteresting to the client. Table 6.1, adapted from Cavanagh (2005), presents some common personality styles and summarizes the types of appeals likely to motivate specific styles.

"Charlie" has many of the traits of a narcissistic or bold leader. He is a stockbroker in his late 40s. He manages a sales team of 20 and he also has his own client base. He is well dressed, extroverted, entertaining, and charming. His clients love him and his sales track record is one of the best in his industry. However, he was recently passed over for promotion, and as part of an organizational leadership development program was assigned a coach. His 360-degree feedback indicates that many of his sales team reported that they felt undervalued and sometimes intimidated by his pacesetting style.

The feedback from his peers indicated that they saw him as being brash, rude, arrogant, and pushy. Charlie was quick to highlight numerous examples of his successes. He gave a wide range of reasons why he should have been promoted. When questioned about the way he managed and developed his team, he stated that he felt deeply for his team and that he would do anything for them, but there was no justification for failing to meet sales targets; after all, "if I can make the figures, so should they." He is sure that he did not get the promotion because the Managing Director and his peers were jealous of and threatened by him.

As can be seen from this brief outline, the key themes of Charlie's narcissistic personality style are a sense of entitlement, grandiosity, a need to be envied and admired, a lack of empathy, a need to be considered special and unique, and a need to be the center of attention.

The broad goal for the coaching engagement was to increase Charlie's ability to develop his direct reports and to build more collegial relationships with his peers. Clearly, this goal is not naturally concordant with Charlie's personality. Thus, in establishing a coaching relationship and setting a frame of reference for working on this broad goal, the coach needs to be mindful of how best to discuss the benefits of working on the goal.

Frames of reference that emphasize empathy for others and a need to acknowledge deficiencies or personal failures are not likely to engage Charlie in the coaching process. Indeed, such an approach may well lead to defensiveness and increased resistance. However, the coach can connect the more adaptive behaviors associated with the goal to the coachee's needs, in this case, increased public profile and personal gain.

Although such pragmatic approaches may be seen as Machiavellian (Berglas, 2002), when used appropriately at the beginning of the coaching relationship, they are invaluable in aligning the goals with the

Table 6.1
Personality Styles, Derailers, and Goal-Alignment Issues
Relevant to the Two Case Studies

Personality Style	Hogan's Typology	Key Need or Motivator	Examples of Appeals Likely to Motivate Engagement in Coaching and Foster Alignment with Goals	Examples of Appeals Not Likely to Motivate Engagement in Coaching	Derailers
Narcissistic	Bold	Need for personal admiration	Enhancement of public profile, opportunities for praise, potential to distinguish oneself, emphasis on uniqueness and being special	Empathy for others, appeals to acknowledge deficiencies/failures, promotion to others' rights or well-being	Arrogance
Antisocial	Mischievous	Need for power and to be the winner	Appeals that emphasize personal gain, challenge, winning, excitement, and risk	Appeals to empathy, social conformity, compromise, and self-sacrifice	Mischievousness
Dependent	Dutiful	Need for affiliation, affection, and approval	Appeals that emphasize belonging, social cohesion, security, and social approval	Appeals that emphasize challenge, winning, excitement, and risk	Eagerness to please
Avoidant	Cautious	Need to avoid negative evaluation	Appeals that address acceptance and security needs, and minimize unpleasant feelings	Appeals that emphasize risk taking, excitement, or public exposure	Excessive caution

Adapted from Cavanagh (2005).

client's needs and facilitate the formation of a collaborative working relationship from which to start the coaching engagement. Over time, during the coaching engagement, the goals can and should be be revisited. Once the coachee is engaged in the coaching process, other frames of reference can be introduced that offer alternative and more challenging ways of understanding (Cavanagh, 2005).

Change is not easy, and despite best attempts at personality-goal alignment, the legwork still has to be done. The coachee still needs to enact the goals and to stay focused on desired outcomes. This is where coaches really do earn their money. Keeping clients focused on the bigger picture and reminding them of the benefits of maintaining action is a central and vital part of the coaching relationship. To do so the coach needs to be aware of the dynamics of change, and be able to match the goal and the coaching process to the coachee's readiness to change.

MODELS OF TRANSITION, CHANGE, AND GOAL-FOCUSED COACHING

Coaching is about fostering directed purposeful change in the pursuit of specific goals. There are three key models of transition and change that can be useful in goal-focused coaching: Bridges' (1986) Transition Model, Schlossberg's (1981) Adaptation to Transitions Model, and Prochaska and DiClemente's (1984) Transtheoretical Model of Change. These models are useful because they give another framework from which to understand the coachee's relationship to the enactment of goals.

BRIDGES' TRANSITION MODEL

Bridges' (1986) model distinguishes between *change* and *transition*, and focuses on the role of emotional reactions to change. Bridges (1986) argues that change is something situational and external. Change happens when something starts or stops. For example, the physical act of moving from one office to another is a change. In contrast, transition is the internal experience of a gradual, psychological reorientation process as we respond and adapt to change. Transition may result from a change, but is often triggered by the news that a change is imminent. In Bridges' (1986) model there are three parts to transitions: ending, neutral zone, and new beginnings.

The model starts with the recognition that transitions start with an ending; one thing must end in order that something else can begin. Hence, the ending phase is one of letting go of the past. There may be a sense of loss, mourning, anger, and/or resentment. Bridges recom-

mends the individuals in the endings phase give themselves enough time to complete the process.

The next stage is the neutral zone, the core of the transition process. This stage is characterized by a sense of confusion and uncertainty about the future. Bridges cautions against prematurely moving out of the neutral zone and suggests that the neutral zone is a place of promise and opportunity, and represents a great chance for creativity and renewal.

The final stage in the model is a new beginning. Here the new vision for the future is developed and enacted. Disorientation and anxieties transform into excitement about new opportunities and actions. Bridges (1991) suggests that individuals in this stage need to maintain a focus on their goals, tune in to their thoughts and feelings, and be open to the need to alter plans in response to unexpected events.

In coaching, this model highlights the place of emotions in the transition process. This is a very useful tool that coaches can use to normalize their clients' emotional responses to transitions.

Schlossberg's Adaptation to Transitions Model

Schlossberg's (1981) Adaptation to Transitions Model outlines some of the key psychosocial factors mediating transition through change. Schlossberg (1981) cites three sets of factors that affect a person's adaptation to change:

1. *Characteristics of the transition itself.* These include role change (gain or loss), source (internal or external), timing (gradual or sudden onset), affect, (positive or negative), and duration (permanent, temporary, or uncertain).
2. *Characteristics of the pretransition and posttransition environments.* These include internal support systems, intimate relationships, cohesion of family unit, social networks, institutional supports, and the physical environment.
3. *Characteristics of the individual going through the transition.* These include psychosocial competence, sex and sex-role identification, age and life span, state of health, race/ethnicity, socioeconomic status, value orientation, and previous experience with a transition of a similar nature.

This model is useful for coaches because it provides a framework for analyzing an individual's difficulties with a particular transition, a cognitive map for understanding reactions to life events, and a way for coaches and their clients to analyze the missing links between transition and adoption.

To facilitate movement toward adaptation to change, coaches should work to help clients develop a clearer perception of their overall life goals; facilitate clients in developing a clearer understanding of their present needs; help clients evaluate how they presently manage strain, stress, and decision making; help clients identify and evaluate their present typical response patterns to a new situation; and facilitate clients' acquisition of new skills that will aid in more effective coping with their own objectives.

Such transition models are very helpful in giving a broad framework for understanding the transition process in relation to major life events and to people's goals. However, they do not focus on the psychomechanics involved in the adoption of specific behaviors, nor do they suggest which strategies might be most effective at different points in the change process as clients move toward their goals.

TRANSTHEORETICAL MODEL OF CHANGE

The Transtheoretical Model (TTM; Prochaska & DiClemente, 1984) was originally developed in reference to addictive behaviors such as smoking and drug and alcohol misuse, and is of great use to coaches who need a model of change that is focused on the underlying psychological mechanisms related to the adoption of new behavior.

Over time the model has been successfully applied to a wide range of problem behaviors and health-related behaviors and both individual and organizational change (Levesque, Prochaska, & Prochaska, 1999; Prochaska, 2000).

The model posits that change involves a progressive transition through a series of six identifiable, although somewhat overlapping, stages. Progression through these stages can result in permanent change. However, for most individuals change is a cyclic process, and many individuals relapse into old behavioral patterns before the new behavior is permanently maintained. On average, people will relapse six to eight times before moving into the maintenance stage. The stages of change are:

1. *Precontemplation.* In this stage there is no intention to change in the foreseeable future.
2. *Contemplation.* Individuals in this stage are considering making changes, but have not yet made any changes.
3. *Preparation.* Here individuals have increased their commitment to change, intend to make changes in the near future, and often have started to make small changes.
4. *Action.* Individuals in this stage are engaging in the new behaviors, but have made such changes for only a short period of time (usually less than six months).

5. *Maintenance.* Individuals in this stage have been consistently engaging in the new behavior over a period of time (usually at least six months).
6. *Relapse.* Many attempts at change result in relapse—a return to the old behaviors.

As people move through these stages they experience a number of cognitive and motivational shifts. Decisional balance, developed from Janis and Mann's (1977) gains versus losses model of decision making, suggests that individuals weigh up the pros (perceived benefits) and cons (perceived costs) of making change. For individuals in the precontemplation stage the cons of change will be more salient that the pros, and this decisional balance is gradually reversed as individuals move through the stages.

There are two other core constructs: self-efficacy and habit strength. Self-efficacy is the belief in one's competency to perform a specific task (Bandura, 1977). Self-efficacy plays a central role in behavior change, affecting whether individuals decide to make changes, the amount of effort they put into creating change, and the length of time they persevere in the face of adversity. Self-efficacy increases as individuals move through the stages of change (Marcus, Eaton, Rossi, & Harlow, 1994).

Habit strength refers to the psychological and physiological aspects of the behavior in question (Velicer, Rossi, & Prochaska, 1996). In workplace or executive coaching when coaching for leadership style change, habit strength might be assessed by the ease (or difficulty) with which an individual can enact new behaviors such as reflective listening, question asking (instead of autocratically dispensing opinions), or remaining calm in situations that would normally provoke an emotional outburst.

The TTM has important implications for guiding coaching practice. Prochaska, DiClemente, and Norcross (1998) outline a number of guidelines for facilitating change based on the TTM that have application in coaching practice.

First, avoid treating all individuals as though they were in the action stage. It is a common mistake to assume that because clients have presented for coaching, they are ready to do the work of change. Coaches need to explicitly assess the client's readiness for change.

Such assessment can be conducted by written questionnaire, behavioral observation, or self-report. Individuals in the action stage are likely to achieve better and quicker outcomes than those in contemplation and preparation, and so individuals in the action stage can handle more challenging behavioral-change assignments and more difficult goals than other individuals in earlier stages of change.

Second, facilitate the insight-action crossover. Individuals who are reluctant to make changes are typically in the contemplation or preparation stages (Grimley & Lee, 1997) and spend more time thinking about their problems than actually changing their behavior. For such clients it is important that coaches focus on facilitating a shift from just thinking about problems to actual behavioral change.

Third, anticipate relapse. For most people, relapse—slipping back into old behavior—is a normal part of the change process (Marlatt, 1996). The coach needs to include relapse-prevention strategies, prepare the client for possible setbacks, and minimize guilt and shame if relapse does occur, and help the client move back into action as quickly as possible.

Because there are different factors at play in each of the stages of change, it is important that coaches match intervention strategy to their coachees' stages of change.

Stage-Specific Coaching Strategies

For individuals in the *precontemplation stage* the general principle is to raise awareness, and the key point here is to increase the amount of information available to coachees so that they can move forward into action. There are many ways of raising awareness, including sales or performance data, structured qualitative feedback, or 360-degree feedback. In addition, in this stage the coach should help the coachee identify behaviors that are not problematic.

One conversational coaching technique that can be effective is to ask the "better question": "In what way would this change make things better for you?" or, if necessary, "You'd better change or else. . . ." Clearly, the "You'd better change or else" conversation is one that the coach should carefully prepare for, as this may well be highly challenging. This type of conversation needs to be firm but collaborative.

The key characteristic of the *contemplation stage* is ambivalence, the conjoint holding of two or more conflicting desires, emotions, beliefs, or opinions. The general principle for individuals in the contemplation stage is to continue to raise awareness through self-revelation. Individuals in this stage are engaged in a balancing act, unconsciously trying to manage their ambivalence by balancing the pros and cons of change. It is as if they were standing in the middle of a child's seesaw trying to maintain their balance.

A common mistake here is to rush in and give the coachee specific goals and action steps. However, doing so will usually simply increase resistance, or they fall off the seesaw! Rather than confront resistance, the coach should *roll with the resistance*, take a tactical retreat and try a range of different techniques, including *simple reflection* in which the

coach reflects back the coachee's main points. Another technique is *amplified reflection*: "So what you're saying is that you'll *never* change?" The coach can also use *double-sided reflection*. Here the coach reflects back to the coachee both sides of the ambivalence, "So, on the one hand you feel change would be a benefit because of XXX, but on the other hand you feel XXX."

For many people in the contemplation stage such double-sided reflection may be one of the few times they have heard their ambivalence clearly expressed. By articulating the coachee's ambivalence, a coach creates a personal reflective space in which the coachee can explore the ambivalence and begin to see the issues with greater clarity.

Paradoxical techniques can also be very effective. When confronted with the coachee's arguments against change, the coach agrees with them, and then emphasizes the advantages of the dysfunctional attitude or behavior. The point here is to get coachees to present the arguments for change themselves. This approach can make clients aware of the powerful forces that motivate them to remain stuck in the problem. The coach may say something like "Well, given all the advantages of this thought [or attitude or behavior], why should you change? To be frank, I don't think you're ready to change yet." Paradoxical techniques can be very effective, but they require skill and timing.

In the *preparation stage* the coachee is getting ready to enact change. The key principles here are more about fostering commitment, although awareness and self-evaluation are still important. In this stage the coach should be helping the coachee focus on the future, developing a clear vision and making small and consistent action steps toward the goals. It is important for the coach and coachee to monitor progress closely, and to positively reinforce new desired behaviors by acknowledging and celebrating the attainment of small subgoals. It is often important to find ways to structure the environment to support the desired change. For example, if an individual is trying to develop a more inclusive leadership style in team meetings, it might be useful for the person to change the seating arrangements and to have some kind of physical cue in the room that would remind the coachee to listen and let others talk.

In the *action stage* and the *maintenance stage*, the general principle is to increase self-directed change. Here the coachee can be working on more stretching goals and devising strategies to maintain the change.

In the *relapse stage* the general principle is to normalize and move the coachee back into action as soon as possible. Here the coachee can reframe relapse as a normal part of change process, and minimize shame and embarrassment. Look for past successes and build on those, and try something new.

Relapse prevention is an important part of coaching. It is often helpful to inform coachees that they may relapse despite their best attempts at change. This information is best given once coachees have experienced some early success, and when they are feeling good about their progress. To give detailed information about relapse too early in the coaching process is to give coachees an excuse not to change. Addressing the issue of the normality of possible relapse gives the coachees permission to be frank about their progress, and this is particularly important when coaching perfectionist high achievers. Such clients may feel that they have failed if they don't make the changes quickly and exactly according to plan, and the associated shame may lead to disengagement from the coaching process.

Once the coach has addressed the issue of possible relapse, it is necessary to plan to prevent relapse. This can be done through rehearsing how to deal with problem situations, helping the coachee develop coping strategies, or even working out how to avoid situations that might trigger the problem behaviors.

It is clear that the informed goal-focused coach will be drawing on a wide range of evidence-based theories while coaching. These theories and the client's responses help the coach develop an understanding of the psychosocial mechanics of the issues, and thus inform the development of a conceptual model. Such case conceptualization is an essential part of goal-focused coaching.

CASE CONCEPTUALIZATION AND GOALS

Regardless of the coach's theoretical perspective, case conceptualization lies at the heart of evidence-based coaching. A case conceptualization is an overall view or map of the case, which describes and operationalizes the factors that create and maintain the individual's difficulty, and also the factors that may contribute to a solution. The case conceptualization is a working hypothesis that links the presenting issues or potential solutions to the underlying psychological mechanisms (thoughts, feelings, and behaviors) and may also detail the environmental, social, or systemic factors at play.

A case conceptualization is developed collaboratively with the client and is an active and ongoing process that is open to modification. Case conceptualizations are frequently sketched on a whiteboard or paper, and the process of developing a framework from which to understand the presenting issues brings clarity and is often therapeutic in itself.

There are two fine balancing points for the coach in developing case conceptualizations. First, there is a balance to maintain between (1)

drawing on expert sociopsychological knowledge and through this knowledge overly influencing the client's understanding, and (2) acting as a facilitator who helps the client create a personalized and relevant case conceptualization.

Second, there is a balance between (1) developing an understanding of the factors that create or maintain any problematic issues and using this understanding as a platform from which to construct solutions, and (2) avoiding getting drawn too deeply into problem analysis and creating analysis paralysis.

In short, a good case conceptualization highlights the important aspects of the client's situation in a way that is understandable to the coach and client, links the issues to the client's stage of change, makes the issues amenable to change, aids choice and implementation of intervention, and helps the client and coach understand the development of new issues and other aspects of the coaching relationship.

CASE STUDIES

The Case of Bob

Overview of Potential Issues

Bob presents with the initial expressed goal of becoming a better leader, getting the business running perfectly, and leaving on a high note. As with many coaching clients, Bob is in a period of transition. His business has grown rapidly and his leadership style has been somewhat successful up to this point. However, his pacesetting and charismatic approach style may not serve him well in dealing with the new challenges, and he will need to develop greater flexibility. On a personal level, he also is beginning the process of disengagement from his working life. Like many leaders in his position he seeks to leave a lasting legacy, and this may be associated with a need to make meaning of his work life. Further, his sense of self will be challenged by the required shifts in leadership style. Finally, his relationship with and his role within his family may change as his moves into a new phase of his life. This case study discussion focuses on his leadership style rather than family issues.

There are several steps for effective process management in executive coaching. Many coaches use a methodology that involves an initial briefing with the person in the organization who will be the "sponsor" and point of reference within the organization. The purpose of this meeting is to assess the organizational context and determine what the organization sees as being the criteria for success. Following this meeting the coach may assess the executive using interview, self-assessment, or 360-degree feedback. This information may then be fed back to the organization and the coachee and a development plan formulated.

Feedback systems will need to be set up so that the coachee will be able to judge his progress during the coaching engagement. The coaching can then begin, and there should be regular reviews of progress and feedback from within the organization. This type of systemic embedding and organizational alignment is a critical foundation for successful executive coaching. A discussion of these issues can be found in Chapter 11 and so will not be discussed here.

Positioning Coaching: The Early Stages

This case is primarily developmental coaching, although some skills coaching would be involved. In the initial meeting with Bob (a meeting held before the coaching process starts) I would take time to discuss the nature of coaching, and I would be careful to position coaching as being different from consulting. This is important, as Bob's focus is on business results, and he may be approaching coaching looking for quick-fix business advice, rather than personal and professional development. These early stages are vital in the formation of a collaborative working alliance, and I would need to get a good sense of Bob's personality style and his needs very early on so that we could discuss his goals in a manner that will be engaging and attractive to him.

The first real coaching session would focus on defining the issues and creating self-concordant and engaging goals, and detailing confidentiality and process management issues. In addition we would establish a time frame for the coaching engagement with sessions held fortnightly over approximately a six- to nine-month period.

Frequently coachees feel a need to tell their stories and give the coach a lot of detail about their lives to that point in time. While this can be useful in cathartic terms, and some clients find that a life review helps them place the coaching in context, my preference in goal-focused coaching is to keep this stage quite short and stay focused on goals and solution construction, rather than delving into the past. I have found that if something is important, then it will come to the surface.

At this early stage of the coaching relationship I would be listening to identify Bob's readiness for change. Although he might well be in the preparation stage in terms of his willingness to start coaching per se, I would expect him to be in contemplation or even precontemplation in relation to the specific behaviors that he really needs to address.

Thus I would be happy to work with quite vaguely expressed higher-order goals in the first instance, and to use these to establish a working relationship. Bob's initial expressed goal for coaching is about being a better leader and getting the business running perfectly and leaving on a high note. We would explore to see if these were the real issues. What does "perfect" mean to him? How would other people see "perfect"? For myself as the coach, this would be the beginning of a case conceptualization process.

In this part of the coaching relationship I would be acting in a psychoeducational role, giving the coachee necessary information and conceptual frameworks (Chapman, Best, & Van Casteren, 2003) and there is a fine balance to be found be-

tween the role of expert knowledge giver and facilitator of Bob's personal self-discovery process. An essential part of the coaching process would be to help Bob become more aware of his thinking patterns, and of the relationship between thinking styles and emotional responses.

Bob has many of the characteristics of an alpha male with a strong narcissistic style. He wants to be seen in a positive light, and is likely to become highly defensive and even aggressive if inappropriately challenged. His preference would be for hard facts and measurable data, and he would give credence to coaching interventions based on research that also had been endorsed or shown to be effective by well-known business leaders (Ludeman & Erlandson, 2004). In terms of enhancing his interpersonal style, for example, it might be useful to discuss how day-to-day conversations have an important impact on the quality of the leader-subordinate relationship, and how these in turn have a very real impact on work performance (Howell & Hall-Merenda, 1999).

I'd also spend some time discussing the role of values by exploring the links between transformational leadership styles (Bass, 2002) and the degree of self-concordant goals set by team member engagement (Bono & Judge, 2003). In explaining the concept of self-concordant, I'd talk about raising the "what's in it for me" factor for his employees and the effectiveness of aligning organizational goals with employees' core needs and values (Oishi et al., 1998). The emphasis in the coaching conversation with Bob would have to be on the utility of enhancing workplace relationships in terms of increased performance rather than humanistic factors.

Although there is clearly evidence of some destructive narcissistic behavioral patterns in Bob's relationships with others, my preference would be to leave addressing these directly until the later sessions unless Bob raised those issues earlier himself. However, I would be asking Bob questions designed to raise his awareness of the real issues. For example, "What makes for a truly great leader—business results alone, people skills alone, or both people skills *and* business results?" "What would be different if you had even better leadership skills?" "How do you know what people really think of your leadership style?"

Because of his narcissistic style it might be useful to position the coaching as helping him further develop his reputation as being an outstanding leader, rather than being a remedial or confrontational process. An important personal developmental insight for Bob would be to see that he needs to change the way he relates to this team and be seen to genuinely care about developing other people, and that it would be only through this that he will be able to get the cohesion his organization needs to deal with the merger and be best positioned for future growth.

From this conversation we may well arrive at the conclusion that a great leader is one who can see the merger through while increasing business profits, increasing delegation, developing key members of the team, maintaining control of the process, and also looking good to others. Thus, in the early stages of the coaching relationship the overall goal might be expressed along the lines of *"To develop strategies to take Bob's leadership skills to the next level, consolidate the business, and build a solid foundation for future growth, and the success of this would be*

evidenced by increased business performance and a leadership style that brought out the best in his management team."

In terms of goal hierarchies and horizontal and vertical congruence, Bob holds the higher-order goal "to be a better leader," and this may be perceived to be in conflict with the lower-order goals of "seeing the merger through," "increasing business profits," "increasing delegation," "developing key members of the team," "maintaining control of the process," and "looking good to others." Clearly it would take some time and coaching skill to align these goals both horizontally and vertically and find ways that Bob could (for example) increase delegation while not feeling out of control. Figure 6.4 gives an overview of the relationships between these goals and the alignment process.

The Transition Process

It might be useful to give Bob a frame of reference of the transition process. I would sketch out Bridges' model and get Bob to talk about which stage he was at, and together we could mind map the issues on a whiteboard. I would also use Schlossberg's (1981) model to ask questions that would raise Bob's awareness of the characteristics of the transition itself, the characteristics of the pretransition and posttransition environments, and the characteristics of the individual going through the transition. This is a case conceptualization process and would be the beginning of the construction of a shared mental model of the issues.

It is important that the first session finishes with a sense of collaborative engagement and that Bob leaves with a homework action plan that will help him develop his understanding of the real issues and move them forward.

In Bob's case his action steps following the first session could be to explore ways he could get the information he needs. Useful homework might be for him to keep a record of his interactions with others, rating each interaction on a 1 to 10 scale for rapport, his use of questions, emotional content, and how well he paid attention to the other person. In addition, it would be important for him to begin a formal 360-degree feedback process, although frequently coachees at this level have had several 360-degree feedback reports in the past, but have failed to make significant changes.

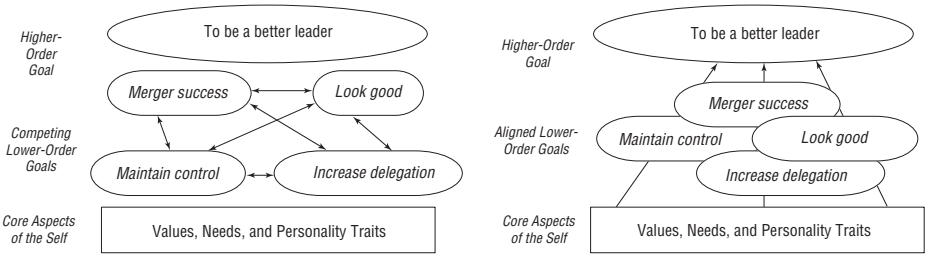

Figure 6.4
Goal Alignment and Higher-Order Goals

Doing the Work of Change

Once the foundations have been established, there is a trusting collaborative relationship, and the 360-degree or other feedback data is in, the real work of change starts. Here we move from contemplation to preparation. Although higher-order "better leadership" goals are useful in the initial stages of coaching, there will come a point where the real issues will need to be addressed in a forthright and direct fashion.

One leverage point might be to highlight discrepancies between his espoused interest in the well-being of others and the perception that he is self-serving and volatile. This will probably not be comfortable for Bob, and I would expect him to be quite defensive and to rationalize and justify his past behavior. It is not unknown for such clients to have temper outbursts or show strong emotions in the coaching session. Rather than being coaching derailers, such displays can be pivotal moments in the coaching relationship, providing powerful learning opportunities for the coachee.

Once the key issues have been identified, behavioral changes need to be designed and action plans developed and monitored. In addition to highlighting Bob's personal resources and his ability to make the required changes, a useful solution-focused approach would be the "letter from the future," a future visioning technique in which the coachees talk, from a future perspective, about how they attained their goals. To guide Bob in this process, I would ask Bob questions, such as, "What objective behaviors do other people need to see from you?" "What mind-set do you need to adopt?" "What needs to change in the organizational systems [organizational structure, e-mails, way that meetings are run, etc.] in order to support you in making these changes?" "What needs to change in the organization's cultural norms and subjective values?"

In addition to this strategic overview, more detailed skills coaching would be useful preparation here, with the coach modeling and then, in turn, Bob rehearsing active listening skills and emotional control techniques. He would receive detailed feedback, so that he leaves the coaching session with a sense of confidence that he can perform the new behaviors when needed.

In terms of between-session action steps, rather than attempt to make large changes to all of Bob's relationships at once, I would encourage him to identify two or three key people in his team to focus on. In selecting those we would look for leverage, identifying those with whom a change in relationship would have impact on other people around them.

The current merger would be an ideal place for Bob to start practicing his new behaviors in his interactions with others. The kinds of external behavioral change we would focus on would include listening to others' opinions without interrupting, remaining calm under pressure, accepting and acting on criticism, following up on promises and previous conversations, and demonstrating a flexibility in leadership style.

The kind of internal change we might use would include a some type of high performance mind-set training program, which would include an attentional training process in which Bob would take a few minutes during the day to sit quietly,

listen to his thoughts and feelings, and practice a simple form of mindfulness meditation. This will provide him with tools to enable him to recognize his mood changes and increase his ability to remain centered and calm under pressure.

In order to keep the momentum up, he would need to complete a daily logbook or some other kind of record, coupled with fortnightly coaching sessions, and occasional e-mail contact. In terms of the stages of change, he would be moving from preparation into action stages, and failing to closely monitor and reinforce the behaviors can result in relapse.

Dealing with Relapse

Relapse in an almost inevitable part of any change process. In Bob's case, because we are dealing with traitlike issues, relapse is to be expected. The challenge here would be to keep Bob engaged and focused on the goal. Bob is likely to find relapse quite threatening and is likely to become defensive and even aggressive, would probably blame others, and may even blame the coach for not being effective. This will be a vital point in the coaching engagement. In order to avoid derailment, a purposeful explicit shift to short-term learning goals may be useful here. Rather than Bob trying to be "perfect," I would encourage him to become more reflective, analyzing his interactions with others for insights and making written notes on his key learnings. Relapses now become learning opportunities rather than a failure point, although there is a fine line between framing these as learning opportunities and letting Bob off the hook for unacceptable behavior.

With Bob there may well be a series of successive relapses with each being quite emotive, and over time he might become increasingly disillusioned with the possibility of ever making real change. If this happened it might indicate a need for a shift to a more therapeutic modality such as a referral to a qualified mental health professional.

Termination and Maintenance

Toward the end of the agreed six-to-nine-month time frame, I would start discussing the termination process, and part of this would be to invite Bob to contact me whenever he needed to and to normalize this kind of intermittent support.

Setting the stage for successful maintenance requires that Bob will have made the changes at both an observable behavioral level and also at a deeper, more personal level. Within the six-to-nine-month period we would rerun the 360-degree feedback process, and these results would indicate whether perceived behavioral change had taken place.

Maintenance of change requires that Bob identify potential derailers and develop specific strategies for dealing with these on an ongoing basis. For Bob the potential derailers would include excessive stress and complacency. Bob will need to keep vigilant, and I would suggest that he keep a regular log of how he is feeling and coping with stress. He will need to build his resilience by monitoring his thinking and watch out for unhelpful and highly judgmental thought patterns; the attentional training exercises would be important here.

If Bob continues with his developmental journey, over time his sometimes

painful learning through coaching will become simply another part of his broader life story—the process through which he grew as a leader. This kind of sense-making grounded in a realistic self-efficacy will form the foundation for a new sense of self and ongoing development.

The Case of Bonita

Overview of Potential Issues

Bonita presents with the initial expressed goal of developing her leadership skills, dealing with conflict, and improving her work-life balance; in short, she seeks to develop a broader and more flexible range of leadership styles. Like Bob, Bonita is in a period of transition. She is in the relatively early stages of her leadership career, and there are some fundamental emotional and behavioral changes to be made if she is to realize her full potential.

To date her natural preference for an affiliative, participative leadership style has served her well. However, in her new position she will have to manage a greater number of stakeholders and a broader range of personalities than before. She will need to become more assertive and less avoidant. As some of her key needs are for harmony, cohesion, and approval, developing flexibility in leadership style may be personally challenging for her. She has considerable strengths to build on. In addition to being genuinely interested in the coaching process, she has already demonstrated that she can proactively manage potential conflict and she has strong family support.

On a personal level, she faces the challenge of balancing her desire to be more involved with her family and children with her career aspirations. Bonita is lucky in that her extended family are able and willing to be involved with looking after her children. For Bonita, it may be hard for her to accept that she does not have to be the perfect mother. Some of the dominant themes from her family of origin were about sacrificing oneself in the service of others, in that her father worked two jobs so that she could attend a good school. Consequently, she felt under pressure to perform well and to make her parents proud. At the same time, as a child she may well have resented these pressures, and her desire to spend more time with her children may be in part informed by her own childhood experience.

Bonita is in a early stage of leadership development. She is unlikely to have participated in a 360-degree feedback process, and I would consider it very important that we gather feedback and meet with her immediate supervisor Ken to get his support and buy-in for the coaching process and to set up a system so that Bonita can have frank and open discussions with Ken about her leadership style. Ideally, one would like Ken to be acting as a manager/mentor in helping Bonita make these changes. The relationship between Bonita and Ken is collegial, but because Ken has tendency to be paternalistic, judgmental, and quick-tempered and favors a pacesetting style of leadership, it will be important to ensure that expectations of the meeting are clear and that the meeting runs smoothly. I would want this meeting to consist of an open discussion about the issues that Bonita is going to focus on, input in objective behavioral terms from Ken as to what would

constitute "success," and an agreement to meet again about halfway into the coaching engagement to jointly review progress.

Positioning Coaching: The Early Stages

Bonita's case is predominantly developmental coaching, with a substantial skills component. In the initial meeting with Bonita, before the actual coaching process commences, I would outline the nature of coaching and spend time arriving at a shared agreement about how the coaching will proceed. Because the coaching game plan involves getting feedback and discussions with Bonita's manager, I would be careful to stress confidentiality issues, and to position myself as *her* coach, rather than an agent of the organization. However, because Bonita is an enthusiastic participant and is people-orientated, I would not expect any objections from her to holding meetings with Ken or in getting 360-degree feedback. Once we have held the meeting with Ken and gotten the feedback, we would start the coaching process.

The first coaching session would focus on the 360-degree feedback and the development of a broad vision and some specific goals. In contrast to Bob, where an early discussion of his problem behaviors may prevent a collaborative coaching relationship from being formed, I would address the problems associated with Bonita's avoidant style very early on in the coaching engagement. It is unlikely that the results of the feedback would be totally unexpected, but Bonita may not be aware of the extent to which her team members would see her as having difficulties in confronting unacceptable behavior.

In this session we would identify the broad goal of the coaching relationship, and I would be looking to find ways to align the organization's goals with Bonita's own needs and values and her stage of change. Bonita has a number of important strengths, and her core values of affiliation and people development would form a useful foundation for framing the objectives of the coaching program. In contrast to Bob's strong narcissistic traits, Bonita's focus is more on the well-being of others, the creation of group harmony, and gaining the approval of other people. Her style could be described as a mixture of the Avoidant/dependent and affiliative styles (Goleman, 2000). She has a tendency to avoid conflict, and she tends to deal with potential conflict by compromise, influencing and accommodating divergent positions rather than taking a stand or direct discussion of difficult issues.

While this can be an effective approach, as an emerging leader an important insight for her would be to learn that conflict is an inevitable part of leadership (Rapisarda, 2003). Her tendency to ignore individual differences in opinion rather than address issues directly leads, in the longer term, to increased dissatisfaction and lack of clarity for team members, and ultimately undermines her own position as leader. Although she is aware of her tendencies in this area, in order to give her a conceptual framework to understand conflict, I may suggest that she complete a conflict assessment measure such as the Thomas-Klimann Conflict Mode Instrument (Thomas & Klimann, 2003). Here I would be again acting in a psychoeducational role, attempting to balance the expert's and facilitator's roles.

Ideally, this discussion would lead Bonita to the realization that her tendency toward an avoidant leadership style is ultimately self-defeating. By not being assertive in proactively managing conflict, she is in fact reducing other people's well-being and not fulfilling her leadership obligations. So, in discussing a potential game plan for the coaching process, I would want to frame the goals as an opportunity to increase belonging and social cohesion. While I would emphasize the benefits of her leadership development for others, Bonita ultimately needs to be making these changes for herself, and a change in focus onto her own development will mark an important developmental shift for her.

Goal Alignment Process

Once we had established that the broad goal of developing effective ways to handle conflict through a more flexible leadership style was self-concordant, we would start to explore the different goals that will need to be aligned. A successful outcome would be for her to demonstrate to Ken that she can be assertive, become comfortable with conflict, further develop the relationship with the president of human resources and the CEO, and remain inclusive and democratic, while improving her team's performance and improving her quality of family life.

In terms of goal hierarchies and horizontal and vertical congruence, Bonita holds the higher-order goal "to develop a broader range of leadership styles," and aligning this with the lower-order goals may present a challenge. However, Bonita has a number of strengths that will help her in this. She already has demonstrated that she can act proactively to deal with potential conflict with Rita, and I would encourage her to talk about her personal strengths in handling this situation. I would also highlight that she already successfully deals with conflicting goals in relation to her family life.

As she may feel like she's not being the "perfect" mother, it might be useful for her to explore some of her beliefs about the nature of motherhood, and to examine whether her aspirations are realistic or idealistic. It would be important for her to arrive at a balanced view of the costs and benefits of being a professional working mother so that she feels comfortable about putting ongoing effort into her future development, and this would be an important part of the goal alignment process.

At some point the issue of her ethnicity would need to be discussed. It is probable that minority group membership has impacted her beliefs about conflict and her sense of belonging. In exploring these issues, it might be useful for her to view her development as, in part, role modeling for other African-American women.

The Transition and Change Process

As with Bob, Bonita is in transition. In many respects she is in the endings phase, and is moving into the neutral zone in terms of Bridges' model. She is leaving behind an aspect of herself that has been with her since childhood, and that is the notion that she needs to be "good": in order to be accepted by others, she needs to make them feel comfortable, and she should not rock the boat or make trouble

for others. The aim of coaching will be to support her in this transition process and help her toward her goal of a more flexible leadership style. Central to Bonita's growth as a leader will be the development of a broader systemic view. She will need to learn to read the organizational context and to learn to tailor her style to match specific individuals.

In terms of the Transtheoretical Model of Change, Bonita is in preparation, and in line with this stage, I would be looking for small and specific action steps that will foster her commitment, enhance her self-efficacy, and raise her awareness of her own internal processes. For example, she might draw up a table listing the different people with whom she works. The point of this would be for her to start to take action in proactively managing conflict and disputes, by developing a more in-depth understanding of each of the people she works with. In doing this she is starting to develop a broader range of interpersonal styles and greater flexibility. In this table she could briefly list each person's key characteristics and rate on a scale the degree to which she feels comfortable about being assertive with that person. She could also detail how she typically behaves with each person, and if there is anything about each person that triggers avoidant behaviors for her. This is the beginning of a case conceptualization process, and this will raise her awareness of the underlying issues that trigger avoidance and that foster appropriate assertiveness.

Doing the Work of Change

Once she has identified some key points to focus on, it might be useful for her to purposefully notice when avoidance behaviors get triggered. I would also like her to notice when she is appropriately assertive, and what is different about those times.

In creating change, she will need to set a number of subgoals and focus on each in turn. For example, once we have identified the people with whom she has difficulty in being assertive, we might rehearse person-specific short assertiveness role-plays, and such skills-based approaches are often very helpful (Aspinwall & Taylor, 1997). It will be particularly important for her to develop conflict management skills, identifying problem situations that might trigger avoidance early in the process, before they become problematic. The mastery of these skills will be crucial in her personal development as a leader.

As for her manager Ken, Bonita may find it useful to rehearse the kind of decisive behaviors that he regards as being important in a leader, and to clearly demonstrate these in her meetings with him. However, behavioral change alone is not sufficient to create long-lasting change (Grant, 2001). Bonita will need to spend some time reflecting on her emotional reactions to these activities. Setting learning goals in addition to performance goals will be helpful in fostering self-reflection, and may make the goals less threatening. This kind of double-loop learning deepens and personalizes learning (Argyris, 2002).

Bonita will also need to make some changes in her home life. I would encourage her to take some time off from work to spend with her family. She may be able to take a day off from time to time, or even to schedule a regular half day. Again, I would expect this to be personally challenging, as the tension between work and

family commitments can be considered to be competing goals. One way that might be useful for her to align these goals would be to explore ways in which spending extra time with her family actually helps her workplace performance. For example, time spent with her family may refresh her and give her a new perspective on work problems. She may be able to do some work from home, and framing these activities as learning goals may be helpful.

Termination and Maintenance

I would not expect relapse to be a major problem for Bonita, unlike Bob. I would anticipate that she will to be able to make these changes relatively quickly. For Bonita, the key derailer will be complacency, prematurely thinking that she has mastered the requisite skills.

To guard against this possibility, I would suggest that she set up regular mentoring sessions with her CEO. She may also find it useful to actively mentor her team members, transferring her learning to them, and to consciously act as a role model for other African-American women.

Finally, I would encourage her to take the time to celebrate her successes, for her family, for her team, and most importantly, for herself. Long-term change will rest on her ability to integrate her leadership goals into her broader vision of herself. Her development as a leader in the workplace is as much about her own personal development as an individual as it is about team functionality.

CONCLUSION

Coaching is necessarily a goal-directed activity. The integrative goal-focused approach to executive coaching presented in this chapter is a multifaceted methodology for helping individuals and organizations create and sustain change.

By understanding the different types of goals and their relationship to the process of change, and through facilitating the goal alignment process, professional coaches can work more efficiently with their clients, helping them to achieve insight and behavioral change that enhances their workplace performance, their professional working lives, and, most importantly, their own personal well-being and sense of self.

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