



Self Directed Coaching

JR is a successful senior manager in a fast growing organization. Over the past five years her organization grew fourfold. Finding staff that possess both technical and soft skills has been challenging to say the least. Adding new staff brings along the need to assimilate them into the organizational culture and seek to leverage their full, fresh potential. With her growing organization, while her title has not changed, her role is changing in ways she did not expect. As a perfectionist she tends to over manage. In her latest 360 survey her staff indicated a desire for more empowerment and support. This greatly surprised to her. During her annual performance review her boss told her she must learn to coach her staff if she is to grow in the organization. She recalled that Jack Welsh, the former GE chair, was quoted as saying "**in the future people who are not coaches will not be promoted.**"¹

On the personal side she feels a bit overloaded, if not overwhelmed. With three children at home and a husband who travels on business more than he is home she is stretched to say the least. Her boss recommended that she would meet his executive coach and offered to pay for coaching services if she asks for it. "Thanks, but no thanks," she told her boss. She could see how coaching impacted his management style and communications skills, but she has many questions before adding more activities to her busy life. She is not sure whether she needs help with her management style, time management or her parenting skills. Recently, one of her friends told her that maybe she needs a new job or maybe a total career change. She could meet with the Coach her boss recommended, but can she trust him with her true feelings about her work environment and her overloaded life? How much time will this take? What happens if she is getting nothing out of it?

About this paper

In recent years coaching has become a very popular term. In personal and corporate settings coaching has had mixed results. This may have brought about some risks due to misunderstanding or unrealistic expectations. The role of a Coach is often ambiguous and outcomes are seldom documented. Managers are often encouraged to be better coaches without giving them the tools or models to follow.

Most leaders do not coach because they do not have the time or have never been coached. This paper is written to help leaders seeking to improve their coaching skills as well as those searching for an effective coaching relationship. In addition, its structure answers key questions about **Self Directed Coaching**, a methodology our clients have found helpful in our coaching practice.

1. What Is Coaching?

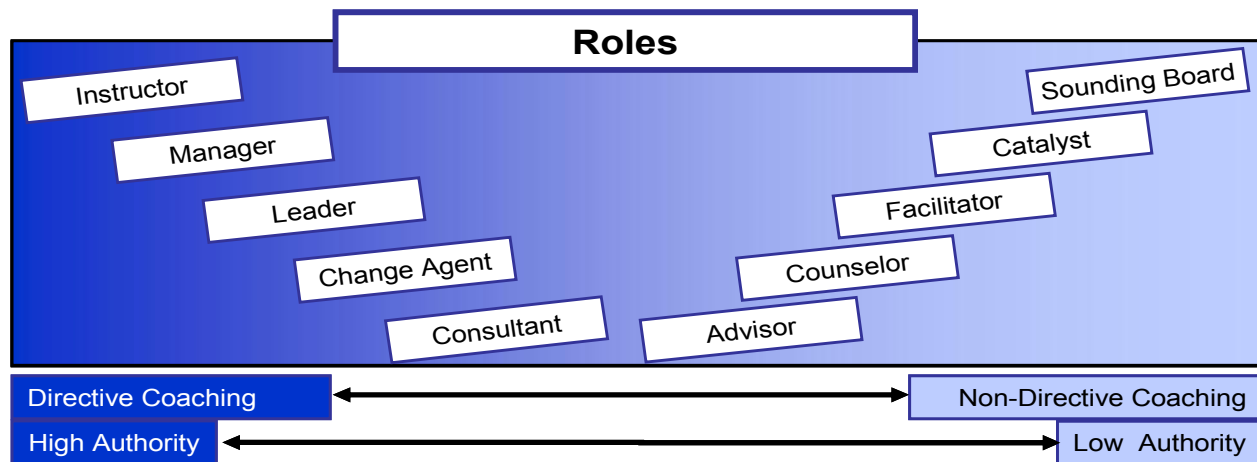
Coaching is a **trusting, purpose driven, highly personal relationship** between a **Coach** and another person we will call "**Client**". Stimulated by the coach, coaching is unlocking the Client's hidden potential and using the unique talents that already exists within. The purpose of a coaching relationship is primarily for the benefit of the Client but **could have** secondary benefits for the Client's organization or community.

Note:

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[Baha & Margaret
Habashy](#)



You are a coach. You do not need a title to be a coach. By the influence you have, you coach. The above diagram seeks to illustrate the many roles coaches play or better still, some of the many roles that embody coaching relationships and can include coaching activities. With this in view, regardless of titles, **effective coaching** is primarily founded in defining the need of the Client supported by an appropriate Coach to achieve Client specific outcomes on the part of the Client.

Coaching is not a one size fits all proposition. Defining the Coach role and processes involved in this role is a critical part of the coaching relationship. The above diagram can help **focus the Coach's roles** thus avoiding some misunderstanding or disappointments. Further, once the key coaching roles are selected the Coach should list the top adjectives or character attributes that best describe this role or what he or she is expected to **BE**.

Referring to the above diagram we can see another way to define coaching. It may be helpful to define coaching as a range between **directive and non-directed relationship** with a range of high to low levels of authority.

- **Directive Coaching:** At one end of the scale this is easily understood as we picture an instructive Coach of your favorite sports team. Here the Coach relies heavily on his or her knowledge, competency, and experience to **direct the Client's activities** in fulfilling agreed upon objectives. In this role the Coach is invested with a high degree of authority to demand adherence to specific instructions. To some degree, some levels of directive coaching apply to managers and leaders who seek to coach their staff, and to a lesser degree to counselors and consultants who seek to serve their clients.
- **Non-directive Coaching:** On the other end of the scale Non-Directive Coaching seeks to enable the Client to rely on his or her own knowledge, skills, and experience to fulfill agreed upon objectives. Here success does not rely on the coach's knowledge or authority but the ability to bring the best outcome based on the Clients' resources. Describing the role of such a coach, Author and coaching expert Myles Downey writes "*The primary function of the Coach is to understand. Not to solve, heal, make better or be wise. ... The magic is that it is in that moment of understanding that the player (Client) understands for himself, becomes more aware and is then in a position to make better decisions and choices than he would have done anyway. This is how coaching is profoundly simple and simply profound.*"²
- Non-directed coaching is not passive. With skillful questions that lead to understanding, the Coach will bring out hidden creativity and insight on the part of the Client. It would be good to note that to be effective, Self-Directed Coaching should be stripped of most authority, but is not totally restricted from giving advice when needed and providing the needed accountability that is critical to coaching success. Non-directed coaching is the hallmark of most successful managers and leaders who seek to empower and develop their teams.

This paper will focus on the Self-Directed Coaching™ methodology we use with our clients.

2. What Is The Coaching Process?

As a **purpose driven relationship** coaching must be disciplined. **SET** (**S**tart, **E**xecution, and **T**ransfer) illustrated in the attached diagram highlights the elements that contribute to coaching success:

Start: The development of initial assessment, purpose, understanding, and agreement is critical. It is important that the coaching agreement have clear terms of reference purpose, and scope. As soon as possible appropriate confidentiality, meeting frequency and format, success management parameters, fees, and disengagement criteria should be made clear. Here it is helpful to agree on the key tools or resources that will enhance the coaching process.

Execution: This is the stage where the rubber hits the road. This reiterative process is at the heart of coaching relationship. It is a series of purpose driven conversations or sessions using the model “**I G R O W**”. **GROW** is the most widely adapted coaching model.

Intro: A review of progress and challenges is a most valuable introduction to a coaching session. With caring, accountability and support the Client is encouraged to persevere in reaching agreed upon objectives.

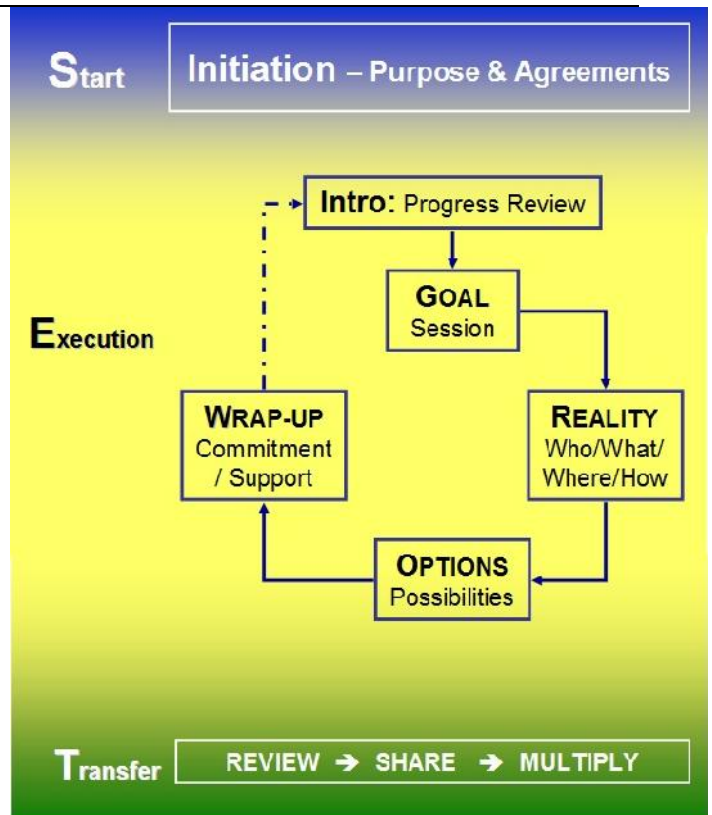
Goal: It is the responsibility of the Client to articulate clear goals for the coaching session. Focusing on goals that are **SMART** (**S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime dependent) is critical to successful coaching conversations.

Reality: Here the Coach guides the Client to paint a **true picture** of the reality he or she faces. Using open-ended questions such as: **What’s** the real problem with...? **Who** else is involved in...? **What** happens if..? **How** do you feel about...? **Where** would you...? The Client’s creativity is ignited and out of his/her own internal resources comes understanding that would not have otherwise been experienced.

Options: As the Client uncovers the reality of issues, people, feelings, opportunities, and obstacles many options for solution and opportunities will emerge. With skillful understanding the most appropriate options will become clearly ready for commitments and actions.

Wrap up: As the Client defines his or her action plans and commits to timely execution the Coach will play an encouraging and supportive role. Even in self-directed coaching, where authority may not present, the Coach must exercise and the Client must accept the coach’s **supportive accountability**. This is essential.

Transfer: At certain points in the coaching relationship it is helpful for both Coach and Client to review and highlight outcomes and lessons learned. Sharing success, whenever possible or appropriate, affirms the Client’s commitment to ongoing improvement. Skills transfer is a powerful way to enforce the lessons learned. “**If you want to be a master of an art coach it**”. It is highly recommended that the Client find teachable people that he/she can help by emulating the model and the skills observed in the coaching relationship. This has a **multiplying benefit** for all concerned.



3. Questions?

Questions are more powerful than answers. "Questions have the power to change lives. They can jump-start creativity, change our perspective, and empower us to believe in ourselves, push us to think things through or call us to action."³ Asking and candidly answering the right questions is the life blood of a coaching session. This is where the skill of a Coach is most revealed and the Client's readiness to change is most demonstrated.

Questions encourage the Client to think. They help the Client to move to a clearer state of awareness and uncover hidden solutions. In addition, questions help the Client understand the realities and the responsibilities associated with them. Questions are also a powerful tool when the need is to focus, articulate assumptions, and qualify risks as well as to move to actions that achieve desired outcomes.

Especially in Self-Directed Coaching the Coach must rely heavily on open-ended questions that start with **how, what, why, who, and/or when**. The following is a sampling of the many types of questions a Coach may employ:

- **Revealing questions** encourage creativity and imagination. They call the Client to think differently. Revealing questions seek to challenge limitations, beliefs, and established priorities.
 - How did you feel about ...?
 - What other pictures can you see when you think of?
 - What values do you hold dear if ...?
 - Who else can you consider for ... ?
- **Ownership questions** encourage the Client to take responsibility, be more proactive or define "SMART" goals and action steps.
 - What part are you playing in ...?
 - What do you want to do about ...?
 - What have you done that contribute to?
 - How can you change ...?
- **Direct questions** seek for focus, action and/or accountability. When wisely used these questions can help ensure that the session time is well spent for the benefit of the Client.
 - How will you communicate ...?
 - When will you act on ...?
 - How can we be sure that you will ...?
 - What progress did you make on a scale of ...?

4. What about Confidentiality?

Confidentiality is linked to trust in the coaching relationship. The purpose of a coaching relationship is primarily for the benefit of the Client. This is especially important when a manager or leader is coaching staff. To develop trust the manager has to work extra hard in putting aside organizational and personal priorities in favor of the Client's (employee) best interest. It must be clearly understood that the coach will maintain as much confidentiality as possible within certain limits. These include legal and ethical boundaries as well as any risks of the client likelihood of doing harm to themselves, others, or anything that compromises the coach's legal responsibilities.

When external coaches are engaged, **the (Coachee) is the client** even if the Coach was recruited by the Client's boss and/or the fees are paid by the Client's organization. **This is a very critical success factor.** In such cases the coaching engagement is based on the belief that valuable secondary or indirect benefits will be realized by the Client's boss and/or the Client's organization. To maintain confidentiality and trust, the Client has the responsibility to communicate the coaching agreement terms and to report appropriate ongoing progress to those in charge of his/her corporate objectives.

5. How Is Coaching Effectiveness and Success Measured?

We value what we measure and we measure what we value. Since both Coach and Client are responsible for achieving effectiveness and success, they share the measurement responsibility. Effectiveness measurement can be based on progress in fulfilling the coaching purpose, objective, and goals. The Coach and Client can also rely on a qualitative perception by assessing how they feel about the effectiveness of each coaching session. The following tools may be helpful in seeking a balance between objectivity and subjectivity:

1. **Health Check: (See tools in A2).** As a needs assessment tool. This simple, qualitative twelve statement survey seeks to assess how the Client feels about four key areas. Evaluated during the initiation session this can be monitored at a high level at the beginning of each session using the Progress Dashboards **A4 a and b**.
2. **Objectives Statements:** Articulated by the Client these statements are the focal point of the coaching process and a key part of the needs assessment process.
3. **Progress Dashboard: (See tools in A4a and b).** These tools can be tailored in response to the Client's needs.
4. **Session Evaluation:** At the end of every session both Coach and Client will respond to the statement **"This session was very effective"** on a scale of **5 = Totally Agree <> 1= Totally Disagree**. The average of the two scores is a good effectiveness indicator. (See Progress Dashboard)

Note: Candid session evaluation is a very effective tool in defining if the coaching relationship should continue or be terminated. When set up as part of the coaching agreement, this can play a significant part in cultivating a candid coaching relationship. **As an example**, the coaching agreement can state that if the average session satisfaction score is below 3 in two successive sessions both Coach and Client **MUST** discuss needed change or termination. If the average score is below 3 in three successive sessions coaching **MUST** be terminated without any blame for either party.

6. Should There Be A Coaching Agreement?

Yes. As with any high value relationship there are risks. A simple and clear coaching agreement seeks to mitigate misunderstandings and sets realistic expectations. The coaching agreement is part of the initiation exercises and should highlight:

- A. Purpose / Objectives:** Highlight the purpose and top objectives that will be realized from this relationship. It is preferable to use short-term objectives that can be realized in one to three months.
- B. Roles Based:** List the top roles the Coach is expected to focus on (see Point 1)
- C. Time Limited:** Indicate the estimated duration of this relationship. This should be linked to the objective time horizon. Preference should be given to short term agreements to be renewed with new objectives if needed. The agreement also should state the frequency and duration and of each coaching session. Indicate if phone or video phone can be used to reduce travel and logistical costs.
- D. Progress Monitoring:** Indicate how progress will be monitored and success will be measured as well as disengagement terms. This is to encourage accountability and appropriate use of resources.
- E. Price Based:** High value coaching has a high price. Rightly or wrongly, we often value services based on their related costs and what we pay for them. **Even when no fees are exchanged**, such as situations when managers coach staff or in the case of not-for profit coaching service and ministries, Clients need to be aware of the price in order to realize the full potential of the coaching benefits. **It is the responsibility of the Coach to frequently remind the Client of the cost and price** to avoid the misuse of resources.

7. How Can You Tell If You Need a Coach?

Athletes world wide know the value of good coaching. The same applies to the game of life. It is safe to say that if you are in the game you need a coach and or you should be a coach. Growing leaders are often coachable and committed to coaching others. Jack Welsh the former GE Chairman said that if you do not know how to coach you can not be promoted. Most leaders fail to coach because they have not been coached.

Some coaching relationships can come in the form of authors of good books as well as unintentional and unstructured encounters. Having said that, in times of change, growth or stressful challenges, nothing can replace the benefits of effective and structured personal coaching. This is the domain of this paper.

The International Federation of Coaching 2008 survey lists the top 10 reasons for which coaches were engaged:

- | | |
|--|--------------------------------------|
| 1. Self-esteem/self-confidence | 6. Work performance |
| 2. Work/life balance | 7. Interpersonal skills development |
| 3. Career or business opportunities | 8. Communications skills development |
| 4. Business management challenges | 9. Wellness |
| 5. Relationships, personal or business | 10. Team effectiveness |

While the above list may tweak the interest, in **self directed coaching** we believe that the client should have more specific indicators to focus his or her coaching needs. To help you, the last page of this paper provides some key questions to ponder. There you will also find a link to a complimentary needs assessment survey. Your scores along clear coaching objectives can be a starting point self-assessment for your coaching needs as well as discussions points with a prospective coach.

8. What to Look For In a Coach?

Coaching is a trusting, purpose driven, personal relationship. Point 1 of this paper “What Is Coaching?” highlights that what to look for in a Coach greatly depends on the role you expect the Coach to play and your desire for a directive or self directed coaching. In **Self Directed Coaching**, competency plays a much smaller role, while trust and personal chemistry play the most important part in selecting a coaching relationship.

To bring more objectivity to selecting a Coach we suggest the following process:

1. **Identify your need** by completing Point 6 above, “How Can You Tell If You Need a Coach?”
2. Examine the roles diagram associated with Point 1 of this paper “What Is Coaching?” and **select the top three roles you expect** your Coach to play.
3. With the results of the above three points in hand:
 - A. **Seek referrals** from friends, associates, consultants, associations etc.
 - B. Meet with prospective coaches for an **introductory assessment session**. This should be a very candid two way assessment of fit. You are responsible to clearly communicate your expectations. Be careful to observe the chemistry, trust, character and desired coaching style. At the same time a good Coach is equally responsible to ensure that you are a good fit for his/her practice. For this reason this session is often offered at reduced fees.
 - C. If you and the Coach have an adequate level of comfort, **review the terms and conditions** of the coaching relationship including :

a. Confidentiality	b. How progress and success will be measured
c. Coaching process	d. Disengagement expectations and terms
e. Tools that may be used	f. Budget, fees, and payment expectations
	g. Next steps including frequency of meetings, place etc.

9. What about Coaching Tools?

Coaches employ different tools and resources to support their focus and the type of coaching they best deliver. More importantly, tools must fit the purpose of coaching relationship. Since this purpose is primarily for the benefit of the Client, tools should not represent a burden that would discourage the coaching relationship. We believe that tools are most effective when administered by the Client and can be used independently by the Client, long after the end of the coaching relationship.

Over the years we have used a variety of tools. Some of the simplest we have placed as a resource you can find at <http://www.nomoreoverload.com/CoachTemplate.html>. These tools can be easily tailored to many coaching needs or used in an independent self-coaching effort.

10. Other Resources:

There are many outstanding authors on the subject. Their books offer helpful methodologies, tools, and templates. Here are a few we recently used:

- Downey, Myles. **Effective Coaching: Lessons from the Coaches' Coach**. South Melbourne, Australia: Cengage Learning, 2003.
- Stoltzfus, Tony. **Coaching Questions: A Coach's Guide to Powerful Asking Skills**. Virginia Beach, VA: Tony Stoltzfus, 2008.
- Stoltzfus, Tony. **Leadership Coaching: The Disciplines, Skills and Heart of a Christian Coach**. Virginia Beach, VA: Tony Stoltzfus, 2005.
- Ted W. Engstrom, **The Lost Art Of Mentoring**: Newburgh, IN, Trinity Press, 2000
- Whitmore, John. **Coaching for Performance: GROWing People, Performance and Purpose**. London: Nicholas Brealey Publishing, 2004.
- Jane Creswell, **Christ-Centered Coaching**: St. Louis, MI, Chalice Press
- Laura Whitworth. **Co-Active Coaching: New Skills for Coaching People Toward Success in Work and Life**: Davis-Black Publishing 1998

11. The Power of a Model:

Whether you want to excel as a Coach or as an outstanding player Client the best resource is a good model to observe study or emulate. The world is full of great leaders, coaches and Clients. Finding the right model can be your best resource on your coaching journey.

May be we can help.

Our passion is for coaching leaders who then coach others to improved effectiveness by overcoming overload

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Go to <http://www.integrity-plus.com/wp/services/assessment/how-are-you>

¹ Tony Stoltzfus, *Leadership Coaching: The Disciplines, Skills and Heart of a Christian Coach* (Virginia Beach, VA: Tony Stoltzfus, 2005), vii.

² Myles Downey, *Effective Coaching: Lessons from the Coaches' Coach* (South Melbourne, Australia: Cengage Learning, 2003), 59.

³ Tony Stoltzfus, *Coaching Questions: A Coach's Guide to Powerful Asking Skills* (Virginia Beach, VA: Tony Stoltzfus, 2008), 7.

