Elevators and Trap Doors of Organizational Effectiveness

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Reflections on “A Multidimensional Approach to Organizational Effectiveness” by Sandra Hill and “Comments: A Multidimensional Approach to Organizational Effectiveness” by Joel Rothaizer

Sandra Hill’s fundamental premise that to be effective practitioners we must consider and operate with a more systemic point of view has a strong resonance for me – and likely for anyone with substantial experience with executives and their organizations. Her additional premise that what she labels “second generation coaching” (I might label this “fundamentalist coaching,” meaning that coaching in and of itself is inherently a worthwhile and sufficient intervention) also provokes a similar set of issues for me as a professional practitioner. Both of these issues contain intertwined sets of concerns if we consider how both of these affect our ability to be high quality intervention agents in the interest of organizational effectiveness.

Whether our businesses are defined in the context of coaching, consulting, facilitation, training or some hybrid of these or other disciplines, I think there are fundamentals of effective practice across all of these. We could call these ‘elevators’ or fast ways to reach meaningful destinations. Likewise, if we are not careful and mindful of some of the practice traps common to these professions, we can fall through typical ‘trap doors’ that could sabotage or take us away from our work.

Following are a few of my favorite trap doors worth avoiding and elevators worth getting on. I share these in the interest of providing further illumination about what went wrong in Sandra’s case study, and more importantly, to light a path for you towards the practice elevators and away from the trap doors.

FIVE COMMON ‘TRAP DOORS’

Relative to the case study that Sandra Hill laid out for us, let us look at some of the ‘trap doors’ that will subvert our effectiveness and ability to deliver value to our clients. As we all know, very often the best lessons are learned through the mistakes and disasters that we create and/or find ourselves participating in throughout our lives and careers. The most valuable learning occurs when we analyze our thought processes and what we were focusing on as we entered, pursued and completed a particular project or engagement. To create the most value for our clients and ourselves requires that we avoid becoming trapped in our own blindness, limited views of the world, biases, beliefs and perspectives.

To create the most value for our clients and ourselves requires that we avoid becoming trapped in our own blindness, limited views of the world, biases, beliefs and perspectives.
Otherwise we risk falling through the ‘trap doors’ and finding ourselves dazed, disoriented and missing the opportunities we were looking for.

Some of these trap doors are so common and insidious that it would be valuable to name them in the interest of making sure we avoid them as we build the kinds of engagements that move our clients, our clients’ organizations, and ourselves forward in meaningful and valuable ways. Here are a few of the trap doors I see practitioners falling through way too often.

**Trap Door #1: Failure to establish clear, measurable results or objectives that have significant value to the client being coached – and the system they work in**

Measurable does not mean only hard, fast, numerical, objective measures. Subjective evaluation can be extremely valuable. In fact, many of the most important results we tend to work on are subjective, such as improved leadership, communication, or team-building skills.

Having an evaluation metric and process allows for a common focus among the client being coached, their organization, and us as the coaches, with input from all parties concerned with the outcome. This produces better alignment among all the interested parties, and leads to checking in with the system for feedback, significantly reducing or even eliminating the risk of being ‘blind-sided’ the way Joel was.

**Trap Door #2: Lack of a coherent, well-structured development process or system that can achieve meaningful results**

Too many of the questionable coaches I have seen and heard rely on an approach that I call “somehow figuring it out” – which I hold to be totally inadequate for a true top professional. This comes from what Sandra Hill calls ‘second generation coaching,’ which puts an inordinate emphasis on process over results. I hold that both process and results are important, and in many ways they have a highly symbiotic relationship – each needs the other to be of maximum benefit.

It is in this over-valuing of process where the practice of coaching itself is presented as ‘the system.’ To me this is somewhere between laughable and deeply concerning. Coaching, like consulting, training, facilitation, etc. is just a delivery vehicle. It is a way to help clients and organizations be, think, and do what is necessary and valuable. In and of themselves, separated from the value and results being sought, these delivery vehicles lack a focus and framework for producing a substantial, nuanced, systemic impact. In many ways, that is how Joel found himself stuck defending one of the tenets of coaching – confidentiality – without being able to tie that into a system or process for producing the results he was there for.

Calling coaching or consulting sufficient in and of itself without regard for the results expected and what is needed to achieve those results reminds me of the story of the man whose only tool was a hammer. To the man with only a hammer, everything looks like a nail. No matter how good someone is with a hammer, building most things requires far more tools.
In today's more complex, fast-paced, constantly changing organizational world, a serious practitioner needs more than just a hammer, even if it is one as good as coaching.

**Trap Door #3: Focusing on activities, behavior and managing ‘things to do’ – rather than developing deeper awareness of self and others, understanding the principles and perspectives that drive behavior, and determining what is really most important and valuable to do before diving deep into a to-do list**

As the great basketball coach John Wooden used to say: “Never mistake activity for achievement.” Coaching often feels good, the way having someone listen deeply to you and care about what you are going through would feel good. Likewise, taking action and doing something often changes someone’s state of mind. However, it is entirely possible to have nothing meaningful, valuable or useful happen in the activity of coaching.

One of my all time favorite thinkers, the late, great Peter Drucker, put this issue in context with his brilliant statement: “There is nothing less effective than to make more efficient what should not be done at all.” Without consideration for the deeper drivers of decision-making combined with clarity of focus, alignment of the team’s intention, and purpose for the actions, most activity will result in a minimum of meaningful impact.

This is akin to an old home heating furnace that is working as hard as it can to do its job of heating, but because of the built up residue in the system, the inherent inefficiency of an aged mechanism, and the lack of being tuned to its maximum effectiveness it may be operating at 50% or less of its potential capability.

Similarly, this is why we see such intelligent, committed, well-intentioned, hard-working individuals and organizations producing a fraction of what you would expect from that much talent and activity.

Consider shooting an arrow as an analogy for what is needed to hit really meaningful targets:

- The pointed arrowhead represents a clear focus on the intended target or outcome.
- The shaft of the arrow represents the alignment of the client and organization behind the intended outcomes.
- The nock or feathers of the arrow represent the coherent system or set of principles that will guide the engagement to its intended destination.
- The bow which launches the arrow represents the clear commitment of all parties behind launching the engagement and reaching the intended target.

If the elements represented by your arrow and bow are ‘just thrown together’ it is easy to see how many ways the process can be off-kilter, inefficient, and bound to miss the target everyone wants to hit.

**Trap Door #4: Failure to understand the systemic issues that drive circumstances you are going to be dealing with**

This ties directly back to Sandra Hill’s primary issue in her article: if you cannot understand and deal with the system within which your client lives and works,
then the probability of success, being of value, and producing a meaningful impact are severely reduced. We need to know about and have some understanding of ‘the system’ within which our clients operate. This includes aspects of their world such as the culture of their organization, the quality of organizational leadership, the individual’s effectiveness as a leader and team member, the nature and quality of the relationships that affect the client and that the client affects, the changes going on in their marketplace, the political climate in their group and company, and so on. Understanding of the forces that can propel or hinder the developmental process are a must, or you can find yourself being marginalized or scapegoated when your projects are not going well.

Imagine knowing very little about these areas of importance to an executive and their organization. How can anyone work with an executive in an isolated way within a complex system and expect to have meaningful and sustainable results? How could anyone not expect to be ‘blind-sided’ by unforeseen forces building in intensity (like Joel was with the senior partners) when they have little idea what goes on outside their client’s office door? This is a formula for disaster – the only questions are: “When will it happen?” and “How will it happen?”

Trap Door #5: Being ‘bought off’ from or compromised in considering, saying, and doing what you believe is best by the seductive hope for or expectation of more business

One of the fastest ways to lose your moral compass and good judgment is by focusing on what future work could be coming to you if you make the folks with the checkbook happy with you. This is our own little internal conflict of interest, as our interest in securing a bigger bucket of new business could make us less willing to work through impediments to clarity, or focus on issues that could prove messy if they could create conflicts that would turn a buyer away from favoring us.

Too many people follow the old adage: “Doing the business is easy. Getting the business is where the hard work is.” While we all probably prefer the larger, longer-term, don’t-have-to-be-sold-again types of engagements, letting ourselves be lulled into being quiet or complacent, either because we hope for more business or are in one of these types of larger engagements, is highly problematic.

Temptation is an insidious form of compromise. To me compromise is one of the ultimate expressions of lowest common denominator thinking.

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THREE ‘ELEVATORS’ WORTH GETTING ON

Given the trap doors discussed above, I suggest that the following are ways to avoid or even seal the trap doors, and in fact could become ‘elevators’ to a higher level of effectiveness, impact and success with clients and their organizations. Clearly, this is far from a comprehensive list, yet these offer some key approaches that have proven extremely valuable over the years.

Elevator #1: Who you are is more important than what you do

Distinguishing what we do as coaches, consultants, trainers, facilitators, etc. is secondary to how we address the question of who we are as professionals. I don’t presume to have the right answer, but I do have a framework that has been highly effective for my coaching students, many successful colleagues, and me.

In the broadest terms I see myself as a partner in the success of my clients. That is more about who I am than what I do. It reflects a way of being, even more than a set of actions. Consider your closest partners – whether your spousal partner, your business partners, your friends, your clients, or other people you hold close and in high regard. Being a partner more likely reflects your common values, sense of purpose, identity and mission, far more than it reflects what you have to do with each other. It is the values, purpose, identity, and shared mission that make the relationship rich, rewarding, challenging (in the best sense of the word), and deeply meaningful.

Being a coach, consultant, or other form of service provider in no way negates the ability to deliver value to others. However, consider the significant difference between how you hold what you feel compelled to do with a meaningful partner and what you feel compelled to do with a client. The metric for a real partner has little to do with what you do, and everything to do with whether what is done is aligned with, considerate of, and serves to produce fulfillment of our common purpose, identity, values and mission. The focus is not primarily on whether I did the actions on my checklist, but whether we reached that state of being fulfilled in the ways we care about most. However, the metric for someone we just deliver services to requires a great deal more attention to the activities that constitute our agreements, and the outcomes we are seeking to accomplish. The focus is far more on the checklist of activities and results than anything else.

Here is where the elevator appears: If you are being a true partner, the opportunity for creating even greater value and accomplishment for your clients is much easier to manifest. Seeking mutual purpose, value and mission usually generates the kind of thinking that is systemic, far-reaching, and more consciously considerate of what it takes to reach these deeper levels of being. While the opposite can be true – that taking action together can lead to a deeper level of being and connection - it is a much more difficult, arduous and uncertain path. A primary focus on actions almost always falls short in considering the ramifications of the more subtle influences such as the environment, culture, relationships, and core decision-making influences.

Elevator #2: The three ‘C’s’ of highly effective executives and organizations

As a great believer in what I call ‘the 3 Cs of healthy people and organizations’ – clarity, candor and courage – I believe it our duty to be clear, candid and
courageous in addressing issues with our clients and their organizations. To do this well demands a well-rounded understanding of the person being coached and the system they live in. How else could we have the clarity to know what to look at, look for, or build upon?

Clarity means making sure that what we are talking about or working on has a level of precision and common understanding. Too often we are living in and with assumptions. What makes that doubly difficult is that all too often they are not shared assumptions, so everyone is in their own world or point of view, assuming everyone else is there too. When everyone is assuming everyone else understands their point of view, while everyone else is doing the same thing, it is easy to see why clarity can be such a powerful force for bridging gaps and building understanding and common focus.

Candor, or the willingness to speak to the issues that often go unspoken, also demands a broader perspective to understand the cause and effect that leads to not addressing certain topics or issues. Candor is not dumping everything on your mind out of your mouth, but rather the capability to be able to say whatever needs and would be most valuable to say at that moment. Being willing to express whatever it is that you or anyone else holds to be a meaningful contribution to shared understanding and outcomes is a critical component of candor.

Courage is the commitment to clarity and candor over the fear of not getting an engagement or losing a bigger future opportunity. Fear about being clear or being candid produces the multitude of private worlds that keeps people locked in their own view of the world, isolated and not understanding others. The courage to be able to speak about what is important, meaningful, or valuable requires – and is a testimonial to – a level of trust and respect that is vital to the successful functioning of any relationship, team, or organization.

Clarity, candor and courage allow us to maintain our bearings in the seas of turmoil that are the typical company cultures today. What do we really have to offer if we fail to hold to our ‘true north’ of speaking what needs to be said, seeing what others cannot or will not look at, understanding how people and situations got the way they are, and being willing to focus clients and organizations in the direction of being clearer, more candid, and courageous? Fundamentally, we must be able to both understand as well as affect the system, even if we are only working with one or a few clients.

**Elevator #3: Shared accountability supports trust and openness**

You know you have a good situation when you are in an organization where all of the key people are clear about the developmental outcomes they are seeking with a coaching, consulting or facilitation intervention. However, you know you are in a great situation when everyone is willing to be involved in and accountable for (to the degree they can be) the success of the intervention. This obviously speaks to a systemic engagement where everyone is on the same agenda, focused upon the important outcomes, recognizing the value of the intervention, and – most importantly – being accountable for the success of the engagement. If you encounter a situation where people are asking you to fix someone or something, and are not willing to participate and be accountable for how they can help, I suggest you either confront their disingenuousness or move on.
This is particularly a problem where the outcomes with a client are remediation of an issue, rather than advancing the development of a top performer's talents and capabilities. As a rule of thumb, it is three times more difficult for remediation engagements to accomplish one-half as much as a true developmental engagement for a top performer. A remediation engagement such as Joel had demands that the people most closely connected with the person or their performance issue contribute to the process in order to avoid the kind of situation Joel ended up in. When every key person takes responsibility for supporting progress and success, you will not find the kind of abdication of responsibility that happened around Roberto's coaching. You will also usually avoid the kind of surprises that hit Joel, when all the key players take a part in making sure everything is progressing.

Perhaps most importantly though is that when people have accountability, they usually are more open, attentive, communicative, and responsive. These characteristics, plus the mutual commitment to a meaningful outcome they are involved with, open the way for trust and respect to be more present. Trust and respect, as the most fundamental foundation stones of all relationships, produce a sense of community around the person and outcomes in ways that support better and faster success.

**CONCLUSIONS**

Hopefully, most of this just oozes common sense, which as we all know is just not that common. As you travel the halls of organizations and engage with clients in the interest of their executive and organizational effectiveness, stay on the lookout for the elevators that accelerate your progress and success. Not surprisingly, these very often are systemic fundamentals and opportunities. On the other hand, the trap doors that cause problems and disruption in your work are often just the opposite – ways in which to avoid systemic interventions and accountability. As Dee Hoch, the founder of VISA, remarked: “Simple, clear purpose and principles give rise to complex and intelligent behavior. Complex rules and regulations give rise to simple and stupid behaviors.” May your journey be simple, clear, purposeful, and exceptionally successful.

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