Who is the Client, Really? Going Beyond “A Multidimensional Approach to Organizational Effectiveness”

By Sue Drinnan, M.Sc. (neurosc), Certified Executive Coach (RRU) and Harry Hutson

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Who is the Client, Really?
Going Beyond “A Multidimensional Approach to 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

The law firm coaching case study by Sandra Hill and Joel Rothaizer is a poignant example of the evolution and potential misunderstanding of the coach’s role in an organizational setting. Their case is rich in detail, cogently analyzed, and impressively forthright in raising understanding of what is required of a coach in a corporate situation.

We see four themes pertinent to business contexts:

1. The potentially limited application of “second generation” life coaching in the corporate world (as opposed to the practice of “first generation” coaches more broadly schooled in organizational effectiveness).
2. The powerful role organizational culture plays in the lives of its members (essential to avoid the “Fundamental Attribution Error,” which holds individuals responsible for their behavior while denying the impact of organizational context in enabling certain behaviors).
3. The cognitive shift required by coaches and consultants towards systemic thinking (where the client is seen as both the person being coached and the sponsoring organization, and where multiple elements in the client system can be understood as interacting to produce their own weather patterns).
4. The importance of a multidimensional approach to enhance organizational effectiveness (with training, consulting, and coaching perceived as natural allies).

These themes, among others, are central to a discussion of the coaching profession as it moves forward in business settings, affecting training, certification, practice and reputation.

Let’s begin with where Hill and Rothaizer ended. What we attempt to do in our review of this remarkable case is, first, reframe the language of generational coaching and implied judgment of relative worth, jointly, and then speak in our separate voices. We will conclude with a shared view of the future.

Success has had more to do with awareness and ability to respond in the moment than with the nature of the engagement.
FIRST AND SECOND GENERATION COACHING

We (Harry and Sue) represent both the old guard and the new, both generations as it were. We have performed worthy service, and yes, we have made our share of mistakes. In retrospect, we’ve been too coach-like at times, too consultant-like at times, and sometimes we’ve muddled the modes. What strikes us is that the difference between winning and losing is both subtle and, in hindsight, obvious: success has had more to do with awareness and ability to respond in the moment than with the nature of the engagement—whether the client is a person or a company, or whether the presenting problem is an individual career or an organizational transformation. For us, therefore, the old/new generational distinction merely confounds the issue.

As can be clearly seen in the table below, neither of these generalized modes, exaggerated as we’ve made them, is more right, useful or valuable than the other. They are chocolate and miso soup. Each has a contribution to make, and both work in business environments. Life coaching has its place in the halls of power, and an organizational effectiveness approach can work even with persons out of work—systems thinking tools, for example, can be very useful in finding a job!

Field-centered coaching pays special attention to broad forces in the workplace that influence individual behavior, such as incentives (bananas), extinguishers (cold water), processes (ladders), and culture (monkeys).

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Here’s the heart of the matter: whether we’re coaching or consulting, a core operating principle is to be aware of when to be field-centered, and when to be client-centered.

When we are client-centered, we are focused on asking questions that open awareness to beliefs, motivations and feelings that function as drivers. Since the client “owns” this unique set of drivers, a coach or consultant must keep a beginner’s mind and avoid leaping to conclusions. Our working assumption is that behavioral change can occur and indeed may follow naturally, when there is an increase in self awareness.

When we’re field-centered we work differently. The “field” is an array of different forms of information, and our goal is to observe it, map it, analyze it, and work
with it. For example, readiness for change is an important consideration, whether it applies to a person or a company, as it concerns the resisting and motivating factors in the system—those forces that keep things as they are and those that pull in new directions. There will always be something in the system that is intractable and not yet ready to be worked on, and so we begin elsewhere, making strategic progress into areas more likely to change.

**THE POWERFUL ROLE OF AN ORGANIZATIONAL CULTURE**

Field-centered coaching pays special attention to broad forces in the workplace that influence individual behavior, such as incentives (bananas), extinguishers (cold water), processes (ladders), and culture (monkeys). The following example is based on a classic experiment.

**Monkey See, Monkey Do**

Six monkeys are in a room with a ladder leading to a dangling banana. The first monkey scrambles up the ladder, and the other five are instantly squirted with cold water. The banana is replaced, and a different monkey climbs up and causes the others to be sprayed—which they do not like one bit. So when the next monkey tries to climb up, they attack him, leaving the banana untouched.

The first of the six monkeys is replaced with a new, naive monkey who is immediately attacked when he tries to climb the ladder. Another of the monkeys is replaced with a new, naive monkey who, without ever having experienced the cold water, quickly learns to attack any monkey going for the banana. Eventually, once all the original monkeys have been replaced, none of them will have experienced the discomfort of having been sprayed, but all of the new monkeys will attack reliably and predictably.

Why is this Monkey See, Monkey Do example of an organizational system important to coaches? Coaching naive monkeys without consideration of the sources of their protective attacking habit is to commit the Fundamental Attribution Error. Our job as coaches is to be on the alert for monkey behavior even when we’re doing one-on-one work with our clients.

**COGNITIVE SHIFT TOWARDS SYSTEMIC THINKING**

The million-year-old ability to pick up on cultural behavior norms without rational contemplation—monkey behavior—is alive and well in modern organizations. When we discern the relationships of people in a system, who influences whom, who hangs out together, who competes, who fights, who departs, and so on, we’re being systemic in our thinking. When we work to determine the readiness of a group, culture or manager, we’re attending to a field that has bearing on possible options we have and moves we can make. When we ask for stories to be told (personal stories or “company myths”), we’re looking for clues to tacit, collective beliefs that explain behavior. So with executive leadership coaching, life coaching or any other form of one-on-one work, it’s vital to consider values and viewpoints (logical or not, as seen from our own perspective) that may have made sense in the past.
THE IMPORTANCE OF A MULTI-DIMENSIONAL APPROACH TO ORGANIZATIONAL EFFECTIVENESS

It's unlikely that a reader of this article would suggest that a single approach would be sufficient to address organizational effectiveness. The idea that you are a coach only if you DO NOT educate, lead, guide, consult, or advise, is an idea whose time will never come. Narrowness in coaching philosophy and methodology yields narrow results, diminished revenue and undistinguished reputation.

On these points we agree—now for brief comments in our separate voices.

DIFFERING PERSPECTIVES

Sue Drinnan

I want to say more about the importance of the work culture setting and then touch on the delicate topic of coach appropriateness and training.

Business workplace “neighborhoods” often have a very rich culture of quiet beliefs, identities, values and priorities, implicitly expressed through leaders’ choices and behavior. Like a healthy growing organism, some work neighborhoods are positive, productive and self-sustaining. Other work cultures are not. If a neighborhood cultural response is part of the problem that the coaching client is facing, then the coach needs to consider what part of the problem is coachable and what is out of scope. For example, a personal gripping fear of what others might think, primitive management skills, perfectionism, and a blame/shame relationship style need to be addressed quite differently than an unwritten company policy that rewards temper tantrums, or a system that honors flash rather than fairness and is intolerant of risk or ambiguity. Given the law firm’s coping pattern, it makes sense to believe that “if results are not quick and to my liking, then it is all garbage and I’ve heard enough,” sounds fair and reasonable. When a system reliably enables this same response to disappointment, coaching the individual alone won’t put much of a dent in the problem.

We need to wrestle with what our profession can do to help us in grey zones where special skill, knowledge or experience will enhance the power of our coaching.

A work culture setting that models the “command-demand-and-can’t-stand” leadership style legitimizes impatience that precludes empathy, curiosity, nurturing and belonging. When these relationship elements are not valued, and the work population buys into the name-blame-shame belief system, there may be stasis—for the time being. But one day and inevitably, conditions change, a new person doesn’t follow or tolerate the dance steps, and a crisis appears seemingly out of nowhere.

When Roberto was asked to play nice with his new team but couldn’t swing the change in demeanor (maybe he didn’t see the WIIFM, or didn’t have the skills to do it), Joel was “held responsible for not doing his job.” For certain, they had different expectations of what exactly his job entailed!

When someone fails to meet expectations, the response to failure is as important as misperception of what was expected. A crisis needs disappointment plus a damaging response. An example of a damaging response is when the managing partner felt betrayed by Joel. To avenge his embarrassment, or to distance himself from perceived failure, he stomped on Joel and Sandra without hearing their views. Did the partner hope such dramatic action would restore his sense of being
in control? While a guillotine instantly takes care of a person's dandruff problem, a coping habit that deals in swift, harsh treatment, in ignorance of a bigger picture, seeds nasty problems for later arrival.

To coach in a subtle and uncomfortable workplace culture that is invisible to the owners of the culture, calls upon sophisticated consulting skills. Even coaches as experienced and accomplished as Hill and Rothaizer were blindsided. When Joel learned that the managers breached their promise (to contact him immediately if they had any concerns regarding Roberto's progress), Joel needed to move out of his forgiving coach role and into the role of an experienced mediator. Did the partners consider that they were asking Joel to somehow mind-read their thoughts on Roberto's progress? The firm's culture legitimized punishing those not in the fold and justified the managers' denial of responsibility. There would seem to be little capacity for empathy and no patience with subtlety. Joel and Sandra were excited and optimistic in their hope for cultural change in the law firm. These are highly valuable virtues in a coach. So what can a coach do to guard against being overly optimistic?

How much checking do we do when working in an organization? As coaches, we want to be hopeful, to see the positive and to trust. We are trained for it, and for the most part it serves us extremely well. Yet failure is always a possibility, no matter how confident we may feel. Every one of us has the potential to be the wrong coach for a job.

Why does talk about the contextual inappropriateness of an approach—or a coach—feel heretical in our profession? No one wants to be deemed inappropriate, not ever. So how could we help coaches decide for themselves what real life experience, certification or training will be needed to address an organizational coaching contract opportunity? Whose job in the relationship is it to decide? How can we help coaches get the training they need to address client organizational needs more easily? What is working well in our present system that we must make sure to keep?

We need to wrestle with what our profession can do to help us in grey zones where special skill, knowledge or experience will enhance the power of our coaching.

**Harry Hutson**

“You can see the ending of the fairy tale in the opening line.”

I want to focus on the question of contracting for coaching and offer an expanded definition. Contracting is more than joining, more than agreeing up front on expectations, and more than writing things down for signatures. Contracting is the prime opportunity we have as consultants and coaches to read the system as it unfolds in the opening moments of our awareness. Opening moments with a client are so revealing because, as new beginnings, they trigger a person or a system to display characteristic, historical behaviors.

At entry, communications are not random. The task is to listen to the story being told and follow its trajectory, without rushing to closure. “Everything is there.” For example, as soon as you begin to establish basic ground rules within
a system (fees, time, place, confidentiality, communications, etc.), you witness characteristic patterns, and any permutations of ideal conditions are significant indicators of preexisting themes and underlying dramas. The fact that Roberto did not want to be exposed as a person being coached—a major anomaly in standard practice—indicates his awareness of the risks associated with being vulnerable, or different, in the firm. Roberto read the culture correctly, as it turns out.

Equally, you can assess openness and readiness for coaching or consulting by how strongly you’re being asked to conform to set standards. The law firm had rigid expectations for performance, honed over a hundred years—they hired Roberto, after all, to provide them fame and fortune and to do so in conformance with their tacit norms. Although the managing partners expressed willingness to be open to diverse styles and make adjustments in their standard procedures in order for Roberto to have a chance to succeed, evidence from the coaches’ own work in a previous consulting engagement with the firm raised serious doubt about these espoused intentions.

In my view, the Hill-Rothaizer case is not about failed coaching—or consulting. It is an example of incomplete contracting and the resulting by-products. The coaches “knew more” at the outset than they allowed themselves to know that they knew. Our challenge is to take in as much as we can as early as we can without filtering or distorting information to suit our preferred mental models, feed our ambitions, or reduce our anxieties.

So here is the sequence of understanding that pertains to contracting. First, we acknowledge much is known at entry and prepare ourselves to be on full alert. Second, we search for patterns—behaviors that lead predictably to other behaviors. And third, we “puzzle through” what these patterns may mean. Our job then is to act with discernment—staying open and present to the unfolding story, making observations (“It strikes me that...”), and testing hunches.

Final point—note that this case concerns a professional services firm. Service professionals live and die by legal contracts where every word, every clause and paragraph, is honed to make things as clear as possible. But as coaches and consultants, we need to work on the other side of clarity, as required in contracts, and focus on the underlying content of an engagement. The lesson is to see the procedurals of our trade as starting points in discovering something specific about human nature we are employed to observe.

Our professional mandate as consultant or coach is to recognize and respect the truth of our experience and the reality of the situation, going beyond what is being expressed to enable and provide what is needed.

WHERE DO WE GO FROM HERE?

Let’s say you have an opportunity to take a lucrative, resume-building large-company contract that feels a bit over your head. You have handled other crazy things in the past, and you figure you can wing this one too. But if you overpromise, you don’t just sink yourself, you sully the reputation of the profession. What is the cost if it backfires? It is a dangerous sort of optimism to say, “I don’t really know what I’m getting myself into, but I’ll try it, think positive, see what happens, and earn the money.”
Of course, in reality, you take the best shot you have with what you know and let the system (person or organization) handle it. Although it’s important to avoid willed ignorance for the sake of getting paid, and heroic fantasies you may harbor about what you want to accomplish, if you do not stretch and risk then you will not grow. And there is the rub.

The idea of a homogenous profession of expert coaches and consultants, able to leap tall buildings in any city, has simply not come to pass. Keeping a beginner’s mind and being agile and open are base skills, but for some coaching assignments, the entry criteria include real life experience, organizational development education, and specific skill sets such as conflict resolution/mediation training.

In keeping with the case authors’ multidimensional perspective, we offer these points for consideration:

We conclude with a plea for friendship, for professional association, and for periodic supervision. How else to recover when we catch diseases that ail our clients—or better yet, avoid the ailing altogether?

Perhaps we need to consider certification for select niches, following the model of the professions of orthodontics, obstetrics, patent law and mechanical engineering, etc. Architects and civil engineers build buildings, but their expertise is distinct. We could consider sectors, industries, cultures, functions or even organizational layers as deserving of unique expertise.

It is always possible that some clients are lacking essential information pertaining to their performance or environment. In some instances, what may in fact be needed is education, hard data or a good swift reality check—in order to establish the true focus of coaching.

How can we enhance continuous learning for first and second (and third) generation coaches and consultants? How do we get critical feedback from peers? As a profession, it’s our job to prepare coaches and coach-consultants for the difficult tasks they will face in organizations, and help find the right fit for jobs that they—and the profession as a whole—most want.

It’s vital to keep our professional humility, openness and hope. Past practice may not predict future success. We must stay in an open and learning mode.

We conclude with a plea for friendship, for professional association, and for periodic supervision. How else to recover when we catch diseases that ail our clients—or better yet, avoid the ailing altogether?

So who is the client, really?

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