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*Stir, Don't Shake:  
A Reflection on the Interview with  
Julio Olalla*

By Susan J. Bethanis

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# Stir, Don't Shake

## A Reflection on the Interview with Julio Olalla

SUSAN J. BETHANIS

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Three weeks ago, I sat with a coaching client who was “lost.” Normally, J.J., a vice president for a high-tech company, is the consummate high-potential leader: a glass-half full kind of guy, a cheerleader for his team, extremely loyal to his boss and his boss’s boss, tireless in his work ethic, and a constant problem-solver. On this particular day, however, the inordinate amount of organizational turmoil he was facing had finally gotten him down. He and his colleagues were running out of good things to say about their company, which had been through a series of devastating internal and external changes, including a reduction in force, bad public relations, and constant reorganizations. J.J. was disappointed in the company’s leadership and in himself for feeling so bad; still, he thought he should “hang in there.”

In the four coaching sessions prior to this one, we had done a lot of problem-solving about his team. In those sessions, I noticed he was focused much more on others than himself, and I sensed that he was not ready to talk about his feelings or his spirit. So we talked about practical matters: how to spin bad news to good news with his team, what information he could share with them that wouldn’t get him in trouble, and how he could spend more time with his wife and kids.

But on this day, I could tell J.J. was close to breaking down. He didn’t cry, but I could tell he wanted to. When he said he was “lost,” I was ready. I sat with him, fully present, while he exhibited and talked about his sadness, weariness, fear and anxiety. I did not interrupt him to problem-solve; instead, I told him I cared about him and was concerned. I normalized things for him by telling him it is perfectly natural to have these types of feelings. And I told him he didn’t have to keep playing hero. I created a sanctuary in that conference room to let him be fully present in his feelings as long as our time permitted.

Towards the end of the session, knowing that he had to put his armor back on for three to four more hours of meetings that day,

I helped bring him to a grounded place with one powerful idea: impermanence. We talked about how each moment, thought, action and feeling are not permanent, that whether positive or negative, they shift and change continually. And we talked about how if they are impermanent, then we do not need to be so attached to them. He knew about impermanence and attachment from studying Buddhism, but he said he'd never really given it much thought before. "Now I will," he said.

A week later, we met again, and the first thing he said to me was "You know, I think about impermanence all the time now; it's really helping me get through meetings, feelings, everything." I was pleased to hear this, and happy for him. "J.J., you're not getting too attached to impermanence, are you?" I asked. He started to defend himself before he realized I was kidding, and then smiled broadly. We spent most of the rest of the session talking about his relief for not being so stuck. He still has to slay dragons everyday, but he was doing it with a clarity he hadn't had before.

#### THE CASE FOR COACHING

In his interview with Bill Bergquist, Julio Ollala says "coaching is here today out of a dramatic breakdown of our times." He refers to several major world crises: climate change, loss of biodiversity, peak oil and energy, healthcare, and education. To that I would add there is a crisis in connection and meaning. The modern organization is one of constant turmoil, churning from the inside and the outside. People's attention is fragmented into many multi-tasking pieces. Technological advances allow us to connect with people at any place and time, shrinking distances and enabling globalization, allowing for more and more connections but with a corresponding diminishment in the quality of those connections. Unfortunately, J.J.'s sense of overwhelm is more the norm than the exception in the fast-paced Silicon Valley world where I work. Some of the highly successful leaders I work with are indeed, "lost." And it is in these moments of "lostness," or crises of spirit and meaning, that we, as coaches, need to be the most present, the most caring, and the most loving.

Good coaching conversations are an antidote to split attention and churn; they go beyond solving problems to allowing for the deep connections we need for our humanness. By providing both a physical space and a designated time for uninterrupted, focused dialogue, a scheduled coaching session in itself creates the boundaries that people need in order to compartmentalize and free themselves of distractions. The time carved out for one-on-one conversation and the presence of a human being who is fully focused on another provides the sanctuary that Julio talks about as so necessary for transformation. Here is a place where interruptions are not allowed, and someone is giving another the gift

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of care, curiosity and full attention. Just having someone listen to your plight and understand you, sometimes, is enough to get you unstuck. At the very least, good coaching helps you sit with and fully experience the suffering that Julio claims is necessary for deep learning. And by giving the chance to practice being in deep conversation, coaching can serve as a model for other deep connections at work and at home.

Another case for coaching is to provide a bridge across the mechanistic and reductionist properties of modern times to which both Julio and Bill refer. In pre-modern times, one person would be a philosopher, a scientist, an inventor, a thinker and a merchant. But most jobs these days are too specialized for their practitioners to gain much breadth of knowledge on the job, and leaders are too busy to read many books. If my corporate clients do read, it is likely to be mostly blogs and magazines about their industry, management, or current events. They are not likely to delve deeply into philosophy, psychology, anthropology, history, physics, biology or sociology. Thus, the coach who keeps abreast of many subjects can serve as a cross-disciplinary teacher, a connector of people and ideas. That is my intent with conducting this summer a first-ever study of its kind, looking into leadership issues in the cleantech industry. After having worked extensively in high-tech and biotech, I hope that I can connect and transfer wisdom and knowledge across sectors and help cleantech leaders avoid making the same mistakes as their predecessors in other industries. But more than that, I aspire to model learning and be a conveyor of wisdom from the ages, as Julio so obviously is.

### **HOW TO COACH FOR TRANSFORMATION**

I think this was a great conversation between Julio and Bill—full of deep ideas, associational connections, and big names in philosophy. But what, exactly, are we to do with all of this? Telling the story of J.J. is an attempt at grounding theory in reality (albeit *my* reality). I have always been one to translate ideas into actions, actions into patterns, and patterns into strategies. In my roles as teacher, speaker, and executive coach, I try to make confounding ideas as accessible as possible. I have an educational background in studying and applying hermeneutics, phenomenology, interpretive anthropology, social constructivism, Neurolinguistics, Bohmian Dialogue, and Buddhist (Theraveda) meditation. My doctoral dissertation was an interview-based study applying post-modern thinkers such as Heidegger, Gadamer, and Ricoeur to organizational change. While I consistently refer to the essence of these particular theorists and broader theoretical constructs, I rarely speak in the actual language or jargon of these theories (which is a bit ironic, considering that what these thinkers have in common is the idea that *language* creates reality).

So, I will leave the heavy-lifting language to Bill and Julio, as well as to my good friend, James Flaherty (see, for example, 1995). I have the utmost respect for these three colleagues, and when I am in their presence, I *always* learn something new....which, I, in turn, want to apply to something else right away. Prone to action and manifestation, I don't have nearly the patience that they do to philosophize. What I would like to explore is this: How do we make the important ideas described in Bill's and Julio's interview more accessible for executive coaches and their clients?

Twelve years ago, I developed a model called "In-the-Moment" (ITM) Coaching that captured much of the essence of the theories I listed above. It also has its antecedents in some of the theories that Bill and Julio chatted about. The ITM Coaching™ model is easy to remember and sticks with coaches and leaders. It has three components: *Rapport*, *Assess*, and *Reframe* (RAR). It is designed to work in interrupt-driven cultures—which are most organizational cultures—and can be done in a quick moment in the hallway between co-workers as well as in a pre-scheduled session with a leadership coach. The model is exemplified in my book, *Leadership Chronicles of a Corporate Sage*, which presents a dialogue between a coach and her client. Each chapter comprises a coaching session, and provides the reader a birds-eye view as to what coaching conversations look, feel and sound like.

The three aspects of the model and some of the antecedents are explained below.

- Build *Rapport*.
- *Assess* the person/situation to understand the issue/picture.
- *Reframe* to help person solve the problem.

### **Rapport**

The first phase of the model is about creating a safe sanctuary for disclosure, revelation and transformation through behavioral and relational rapport. I have taken some very practical ideas from Neurolinguistics as ways to get into behavioral rapport, including matching the coachee's body language, voice qualities, and words. Make a little small talk; find some common ground or pay a compliment to show you're paying attention. Be in synch with the client: lean forward when he does, use hand gestures if he does, and match facial expressions. Do not mirror the client exactly, and not all the time, but enough to convey your interest and care. If the client is upset and speaking quickly in a high-pitched voice, match the tenor of his voice, and then bring it down a level to calm him. Practice active listening by paraphrasing and observing what you are hearing. Match the client's goals, interests, experiences, knowledge, level of urgency, and emotional state through your behaviors. This is not manipulation, you are not secretly

trying to get the client to do something that he does not want to do; the idea is to match the client enough that he feels listened to and understood. In my experience, the most important gift you can give a client is to simply “get them”; and establishing behavioral rapport is the first step.

The next step is to establish relational rapport. This is about being fully present with your client or coachee. Being present means you have cleared the distractions in the external space *and* in your head so you can focus like a laser beam on your client. For a coach, presence is also a reflexive activity. Reflexivity is a phenomenological term, and in its simplest definition means “reflecting in the moment,” without drawing conclusions. It can be difficult, if not impossible, to focus on your client and reflect in exactly the same moment; eventually, however, with experience, you will be able to toggle back and forth between hearing what the client is saying and reflecting on its varied meanings, without projecting too much of your own “stuff” through your filters.

This internal experience, with its external manifestation, is ultimately what it means to be present. And this presence allows for you as a coach to experience what is actually there, what is actually unfolding before you. This enables your client to fully experience what it is that he is experiencing. As Julio says, one interpretation of coaching “is that I will support you in unfolding in the way that you want to unfold. I will be part of the dance in which what wants to happen will happen...What if coaching is nothing but helping the human being align with him or herself so that what wants to happen will happen?” Establishing rapport is the first step in the dance.

### **Assess**

Julio equates the metaphor of assessment with interpretation and objectification, with stepping out of the experience of a situation in order to explain and label it. In contrast, we use the term more as a synonym for inquiry, and as a reminder to stay *in* dialogue, *in* the experience as long as possible before moving to advocacy. In the assessment phase of ITM Coaching, the coach asks questions from many different perspectives: emotional, cognitive, behavioral, and spiritual. The goal is to understand who the person is and how they are in the world—what they are being and becoming—and what actions they are taking versus the actions they really want to take. As with reflexivity, it is tricky, this simultaneous *being in* and *sharing of* experience. When coachees tell a story of something past or of future hopes, the act of language does take them out of the present experience. But we cannot think and learn without language, without being in relationship. This is the quintessential tenet of post-modern thinking (e.g., hermeneutics, social constructivism, critical thinking). Heidegger (1971) said, “Language is the house of Being. In its home, man

*The biggest mistake people make in coaching others is to not spend enough time in inquiry.*

dwells.” The client cannot experience his true self unless he is with someone else providing a mirror, and that mirror needs language to flourish. We can also draw from quantum physics (Bohm & Peat, 1987), new biology (Maturana & Varela, 1987), and interpretive anthropology (Geertz, 1983) to address the social nature of human beings. These disciplines have shown over and over that the experimenter affects the experiment (or experience); that objectivism doesn’t exist. Thus, we are living in a universe of constant flux and impermanence.

The biggest mistake people make in coaching others is to not spend enough time in inquiry. We are so accustomed to being in problem-solving mode, and often our burning desire to help our clients gets in the way of being open to the client’s stories and focusing on the meaning behind that story. Up to ninety percent of a coaching conversation should be in assessment: not of the problem, but of the person in context of a problem or situation. The coach needs to understand the structure of the client’s interpretation, the frame of reference that he is using. This is done by asking powerful, open-ended questions starting with “what,” “how,”...and “help me understand.” Closed-end questions that can be answered with a yes or a no are designed to confirm a thought you may have and could be too leading. While asking these questions, the coach needs to notice the most relevant problem that the client thinks needs solving. In addition, the coach must notice the patterns and possible limiting viewpoints behind that problem. What is the client’s experience of the problem? What is underlying the client’s complaint? What is the commitment the client wants to make? What is the competing commitment that is preventing him from following through? All of these questions will help deepen the learning for the client, and enable him pause, reflect, and transform his suffering into learning.

### **Reframe**

Once the coach has a frame about how the client is in the world (i.e., what he thinks and feels, what he says, and what he does), then, with the client, she can work to shift that frame. Coaching is about reflection and wisdom, yes, but the bottom line is that it is about helping the client/coachee get unstuck. That is why *assess* and *reframe* are so closely aligned and integrated. The coach needs to understand how her client is stuck, and understand where he is, before he can possibly shift to a new perspective, by way of what I call a “distinction.”

As I mentioned in the prologue, J.J. and I discussed the specific distinction of “impermanence.” This proved to be a real gem for him. While I was the one who provided the new language for J.J., it came out of an unfolding of the conversation, a natural progression, what I refer to in my dissertation (1993) as “stirring

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the waters to actuate a disclosure.” Translation: My job as a coach is to be in relationship with my client and to be at the right place at the right time in the “onion-peeling” process; learning is more of an unfolding process than it is a cause-and-effect change event. J.J.’s situation was a perfect example of this, in that if I had tried to impose a distinction of “impermanence” six coaching sessions earlier, it would not have resonated with him like it did. Sometimes coaches (with their clients) and managers (with their direct reports) over-assess, over-interpret, over-explain, and then go down the least effective route. Just remember: Stir, don’t shake.

### CONCLUSION

As Julio said, “Coaching can be interpreted as the recovery of the ability to have conversations.” As much as our mechanistic world requires, we as coaches have official assessments, goals, measurements, and contracts. But the essence of what we’re doing is having a conversation with another person, a powerful conversation that allows that person to be who he is, to understand more about who he is, and to disclose more of who he is, in a safe place. So the experience itself is gentle and tender, and ultimately satisfying. Coaching is more than about that one conversation, however. It serves as an exemplar for having other kinds of conversations like it. Just as you can’t really meditate without having practiced it, you can’t have deep, transforming conversations with all those in your life without having practiced them. In this way coaching serves as a model for connection. We teach our clients the same ITM Coaching model that we use with them, so that they can go on and practice it with others in their organization. In this way, we hope to generate the new, post-modern future.

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