Shadow Coaching Organizational Transformation: Individual, Team, and Organizational Dynamics of Change

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This article explores how executive and team Shadow Coaching® supported clients in transforming an organization to deal with two overlapping events: a global pandemic and 2010 Olympics and Paralympic Games. The author discusses a number of ways the shadow coaching intervention supported her client, client’s teams, and the organization to shift from doing “business as usual” to restructuring and leading in an emergency response situation.

BACKGROUND
The Public Health Agency of Canada’s primary goal is to strengthen Canada’s capacity to protect and improve the health of Canadians and to help reduce pressures on the health-care system. Coaching within this Agency was originally focused on growing leadership, strengthening teams, and increasing collaboration and inter-team engagement, as well as strengthening working relationships with Provincial Government counterparts. Change was strategically implemented as necessary to meet the terms of their mandate. The role of the Agency is to

- promote health;
- prevent and control chronic diseases and injuries;
- prevent and control infectious diseases;
- prepare for and respond to public health emergencies; and
- strengthen public health capacity in a manner consistent with a shared understanding of the determinants of health and of the common factors that maintain health or lead to disease and injury. (Public Health Agency of Canada, 2010)

I began working with the Agency in Spring 2009. “Business as usual” shifted to a more reactive, emergency response environment that dealt with two separate and distinct events: the H1N1 Global Pandemic and the 2010 Olympics and Paralympic Winter Games. Rather than be able to strategically design and implement change to increase leadership effectiveness and impact, change had to happen quickly and effectively to ensure the well-being of Canadian citizens in two overlapping, high risk situations.
Shadow Coaching in this context enabled me to coach in real time and work with their Jungian Shadow at multiple levels. The Shadow Coaching® methodology attends to the individual, social, relational, and environmental aspects of my clients’ “worlds.” Change initiatives often highlight people’s hidden talents and leadership capabilities as well as their shadows, including fears, insecurities and cultural tethers.

Change initiatives are impacted by individual, team, and organizational behaviour. People often shine in their own right when working on their own. A team with the same high-performing individuals won’t necessarily result in a successful team. A distinct chemistry reveals itself in a team dynamic that can either be a positive group chemistry (generative, innovative, and dynamic) or a toxic environment. Neither reveals itself until the teams begin to work together nor will it while coaching individuals one-on-one.

Shadow Coaching delves into the underlying and often hidden drivers of human behaviour. I observe how individuals construct interpretations about their ways of being and their place in their environment which are then reflected through their language and actions. I observe their behavioural drivers, their shadows, and help my clients observe and acknowledge what is revealed. By entering their environment and coaching them through the chaos of their days in real time (especially within an emergency response situation), I help them translate newfound awareness into practice. I teach them to become reflective practitioners. Together, we continually co-design the coaching intervention in order to shift their learning. My clients live in a continuously changing environment. In effect, they have to (what I refer to as) “dance in real time.”

I have a finite amount of available time to coach clients in the midst of complex and chaotic environments. Our session might be only a few moments where I coach them on one thought or one situation that had just unfolded. Through such coaching, it now resonates. They remember it, integrate it, and because of it, change how they choose to operate in the future. A question I continue to ask myself as we run through the day is, “What do I have to shine a light on that will clear their mental clutter and illuminate the truth of the moment so they can move forward?” How can they articulate what change will mean to them (in a positive light) so staff can engage and support the change?

We work on how to develop their own approach to implementing transformational change. They come to understand the complexities and uniqueness of how they can best interact with other individuals, within a group or team, within the organization, and within the overall environment or community they impact.

Rather than be able to strategically design and implement change to increase leadership effectiveness and impact, change had to happen quickly and effectively to ensure the well-being of Canadian citizens in two overlapping, high risk situations.

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1 In Jungian psychology (Jung, 1971), the shadow or shadow aspect is a part of the unconscious mind consisting of repressed weaknesses, shortcomings, and instincts. It is one of the three most recognizable archetypes.
I help clients identify the key individuals who will advocate and lead the change within the team. I work with each leader individually and coach them on creating strong, collaborative, professional relationships or partnerships, and to use clear methods of communication. They start morphing their leadership style, leading more from inquiry than “command and obey.” They begin to create an environment that promotes generative dialogue and engenders trust.

What does the coaching intervention have to look like to develop executives and managers to become better leaders in the midst of critical situations? The goal is to develop the leadership capacity of those who are leading the change initiative and who will continue to play a leadership role in the organization. We narrow the gap between the leaders’ understanding of what effective leadership is in an environment of crisis, and explore how to build strong networks internally and externally to support them.

The Shadow Coaching relationship lives in the world of “What the client doesn’t know, is paying attention to, or is uncomfortable with, and isn’t sure how to integrate what their discovery into their way of being.” Working with their shadow personalities along with their talents and strengths helps them continually improve. I go beyond the client’s awareness into what the client doesn’t see, such as skills, behavioural patterns, filters or lenses, shadow personalities, and cultural tethers. We combine the latest methodologies of leadership with experiential learning to bridge gaps between

- what leaders are currently doing and effective, sustainable leadership practices;
- various styles of leadership and what is applicable and relevant for them in the context of their present environments and situations; and
- the differences in leadership styles when leading an organization or a team within the organization.

I ask my clients to set aside their assumptions; think in the moment and let go of the need to get everything right; plan and control the process, especially during an emergency response situation; and create space to be reflective rather than reactive in their choices. In that way, we can reproduce what works and let go of what no longer fits within any situation.

We look at best leadership style within the current environment, as well as pay attention to the roadblocks that have to be removed and shadows that have to be identified. These are assumptions, drivers, and behavioural programming that no longer serve them, such as fears, attachments, expectations, limiting beliefs, and resistance. For example, do they understand tension and not let it create a roadblock to change in order to manage the initiative successfully?
We narrow the gap between the leaders’ understanding of what effective leadership is in an environment of crisis, and explore how to build strong networks internally and externally to support them.

Are my clients trying to fit a major organisational change into an old organisational structure, e.g., not falling back on cookie-cutter solutions? Are they so afraid of making a mistake that they rely on what happened from past experience rather than creating something relevant to this situation? Some of the indicators are whether they are thinking and speaking in the past tense, and if they can articulate what success will look like.

**SHADOW COACHING INDIVIDUALS, INDIVIDUAL CLIENTS WITHIN THEIR TEAMS, TEAMS AS A SINGLE ENTITY, AND MULTIPLES OF TEAMS**

**Overview**

The paradox is that change is constant. To successfully lead a critical change initiative, leaders have to consider how people respond to change, what creates pushback, present habits that need to shift, and mind-sets and behaviours that manifest themselves at the individual, team, inter-team and organizational levels.

Once I’ve worked with senior leaders (as described below), I then work with them within a team context. In critical situations I do both concurrently as time is of the essence. Team dynamics have a chemistry all their own.

To respond to this and engender trust at all levels in the Emergency Operation Centre (EOC) within the Agency, I worked with my client and her team to create a Leadership Code. Once the team was rotated out of the Centre to prevent burnout, we worked to co-create a Code of Conduct by which the team could live and to which it could be held accountable. This way, when conflict arose they could hold themselves accountable to behave with integrity, leadership and collaboration, no matter what the situation.

The next stage of my work was with multiples of teams. Working with my clients and their teams, we were able to create centres of excellence. Working with multiples of teams was challenging. Even though team dynamics improved, and relationships and partnerships within the team strengthened, greater complexity still presented a challenge: sharing a sense of purpose and direction while setting aside team egos to serve the overall direction of what the Agency had to accomplish.

Communication flow had to be clear and consistent. Assumptions and perceptions about roles, level of responsibility, and identification of person on point for specific arenas in a hierarchical environment couldn’t interfere with working collaboratively.

The shadow coaching intervention included working with clients on how to craft multiple “environments” to support them in moving forward. When I Shadow Coach clients one-on-one and observe them throughout a series of chaotic days and in multiple contexts,
We look at best leadership style within the current environment, as well as pay attention to the roadblocks that have to be removed and shadows that have to be identified.

I get a better sense of who they are. At that point I can formulate a coaching plan that addresses the interpretations they construct about themselves, assumptions they might be operating under, and roadblocks they might be erecting as a barrier to their success. Environment is defined as 1) the aggregate of surrounding things, conditions, or influences; and 2) the social and cultural forces that shape the life of a person or a population. We look at and define a variety of environments and fine tune them specifically to my clients and what they are currently living and experiencing. Here are some of these environments:

- **Relationship Environment**: an environment of healthy, supportive, and creative relationships, people who are in our lives on a regular basis who energize and engage us, within and outside the work environment.

- **Network Environment**: an extension of the Relationship Environment. This is a connected group of support systems inside and outside the organization. These people, brainstorming groups, or mastermind groups provide an exchange of information and build bridges to others who can support clients and enhance their work and personal life. Who do they need to know (who they don’t currently know) to support them in their work? These are people within internal or external networks who have the information, expertise, and experience my clients might not have.

- **Physical Environment**: effective, uncluttered office space, meeting space, or collaborative space to enable generative dialogue and dynamic group/team work.

- **Financial Environment**: resources and budget that support a change initiative and ongoing work.

- **Technology Environment**: social networks that support communication and conversation. Connectivity to support clients in many of their other environments and expand their influence. The technology environment is everything that supports them and their network beyond their immediate physical environment or geographic location.

- **Health Environment**: taking care of self within a complex change initiative. This includes eating properly, reducing stimulants such as sugar or caffeine; protecting space to think; taking time to process what they have to respond to from an intangible (subtle, not yet discerned) perspective; and regenerating energy from healthy sources.

[continued on next page]
• Memetic Environment: determining how clients process information, working with or against their fears and insecurities, enabling their talents to come to the forefront, and recognizing filters and roadblocks that might stand in their way, such as cultural tethers and outdated personal “programming.” Their memetic environment is also how they share perspectives and through what meme or filter.

Figure 1. Progression - Individual

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Shadow Coaching individuals

Awareness. We began with the understanding that change must happen—immediately.

Perception. We examined how clear the mandate was for change and whether or not everyone had clarity about what they were changing from, what they were changing to, and the rationale behind both.

Paradigm shift. I discussed key distinctions with my clients: Did they have an open or sceptical attitude towards change? How did my clients (individuals, individuals within a team, and teams) see things, do things, and expect things to happen? We identified the dynamics that would drive both so I could help my clients leverage their open attitude and process their scepticism towards change. This included identifying ways for them to replace scepticism with openness and a collaborative spirit.

We discussed and processed how they were making the necessary shifts throughout the change process. They continually reinvented what needed to be tweaked, while promoting a learning/growing/

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2A meme is an idea, behaviour, or style that spreads from person to person within a culture.
evolving environment at the same time. Clients saw the benefit of creating new paradigms rather than changing old ones. We defined and implemented new paradigms to create a healthy environment and organization with positive values.

**Integrated learning.** Speed of learning and integration of that newfound knowledge or skill are as important (if not more so) than how much one knows, especially in a change intervention. We don’t reorient around change. How quickly do they learn new concepts and integrate that knowledge, or do they use it at all? How quickly do they learn and apply that learning? Through the shadow coaching relationship, we look at ways of contextualising change and creating new paradigms to glide through it.

Working with the individual leaders, we explored emerging shadows (such as their fears, insecurities, and assumptions) that might potentially create roadblocks to leading a successful initiative. We discussed *internal locus of control* and *external locus of control* to determine what was within or beyond their control. Working with the client to identify areas of external locus of control, then setting those issues aside for the time being, helped them focus on what they needed to change in order to successfully align with the organization’s focus. We explored what shadows emerged because of past experiences and what shadows had no factual basis. Once we identified these shadows, we worked on each as they were revealed until they no longer had a firm hold on the client and impacted his/her choices. Awareness of behavioural triggers, shadows, and habits that no longer served them opened up the space to address the change comprehensively.

We identified what was happening in the organization that would remain a constant and what aspects would have to change. When someone assumes everything has to change, it is often overwhelming. We used the constants we identified to create a stable foundation upon which the change could be built. We then looked at the timeline for when the change had to be implemented and the drivers behind the change or the answer to the question, “Change to meet what immediate needs or crises?”

Some of the questions that needed to be answered were these: What are the situations that are driving the change? How quickly do the organization and its leadership have to change what they’re doing in order to respond immediately and effectively? There are personal and professional “implications upon implications upon implications” to these leaders and their teams of having to work 24/7. In the case of these two overlapping and in some ways interrelated events, change was externally motivated. What could the long-term benefits of these changes be? How could business practices for an emergency framework be integrated into everyday business? What long-term change would benefit the organization when they’re not responding to a crisis situation?
When someone assumes everything has to change, it is often overwhelming. We used the constants we identified to create a stable foundation upon which the change could be built.

**Shadow Coaching individual clients within their teams**

I needed to consider how my clients learning and behavioural shifts fit within a team context and what shadows emerged within the team. How could they incorporate the “environments” they’ve created into a team context? We redefined their environments to apply within a team structure so they would benefit everyone on the team. We explored

- the dynamics of combining individual networks to broaden audience, and expand communication capabilities and increased levels of collaboration;
- the workplace financial environment. There are implications of increased budget if combined with other teams or reduced budget if shared;
- the key relationships. The coaching relationship changed as we shifted from working one-on-one to within a team structure. Relationships are multi-faceted, from inter-dependent, inter-developmental, to (in the best case scenario) the joy of working with individuals simply because energy and appreciation are very high;
- coaching through conflict. Shadow Coaching in real time created the opportunity to deal with conflict before relationships (internal and external to the team) started deteriorating and therefore, it might have impacted team cohesiveness; and
- reliance on others. Collaboration created a tipping point for acceptance and engagement within the organization as a whole.

Working with my client in a team context, we identified group shadows, insecurities, and assumptions that were impediments to moving forward. We identified what worked well within the team and with other teams, internal and external to the Agency. We looked at the ebb and flow of change, measuring success and reinventing change to meet emergent needs. As I was working concurrently with my clients on an individual basis and within their teams, we worked on the shadows that revealed themselves within a team environment and what collective behavioural drivers would have to change.
Using the Leadership Code, the team was able to give constructive feedback. The team continuously reinvented how it worked together by developing and strengthening collaborative partnerships to get the job done well. These collaborative relationships enabled the team to monitor the status quo and identify what had to change immediately to prevent team and inter-team breakdown in effectiveness and communication.

Change for the most part is a people-driven process. Change must be embedded at all levels. Personality issues must be identified and dealt with continuously through the process of implementation in order for an initiative to be successful.

Awareness of the impact change has on people is vital to its successful implementation. It is often assumed the bulk of the responsibility and stressors lie with senior leadership. It’s not necessarily the case. Stressors and responsibility vary according to level but are present and key factors to the success of any change initiative.

**Shadow Coaching teams as a single entity**

Working with teams as a single entity changed focus for the coaching intervention. New questions emerged within this dynamic which had to be addressed:

- What shadows emerged within a team? What were their collective fears?
- Was the team on intention? Were they setting goals and creating action to achieve them?
- What was working? What wasn’t working?
- What did the team absolutely have to do and absolutely not do? (Choice for the sake of what results?)
• How could this team work better with other teams?
• What did coaching have to focus on in order to reveal excellence (even in a subtle form) or help them remove a roadblock to which they weren’t paying attention?

Figure 3. Progression – Teams as a single entity

Shadow Coaching multiples of teams
Shifts in and within inter-team relationships had to occur when many teams had to orchestrate the “dance” of change. Some of the areas I had to focus on when working with many teams in real time included these:

• Provide team coaching on co-creating a process and framework that would help them through the transformative change process.
• Help teams become centres of excellence and continue to work together well after the change initiative had been implemented.
• Identify key indicators for measuring success.
• Coach teams on how they could measure success and ongoing success as individuals, individual teams, and groups of teams.
• Document lessons learned and best business practices to use in future similar situations.
• Identify the differences and impact to the organisation between an orchestrated transformational change initiative and using the “Dance of Change” tool (see below) on a regular basis (in other words, continuously reinventing work depending on circumstances).
• Explore the concept of “reinvention” and starting from scratch, as opposed to “change” what is already in place. (Explore the distinctions between positive energy and potential overwhelm, and how and when they emerge.)

How do multiples of teams get beyond silos or their individual team mandates to work together towards a common result? How do they co-create something strong and sustainable so it’s as seamless a change as possible? What shadows or roadblocks emerge within an inter-team context? There were issues of competitiveness, levels of authority or power. There were teams whose work had direct impact on survival rates while other teams worked in the background to support those on the front lines. Aligned teams were the foundation for a successful change initiative. If everything was regarded as critical and urgent, nothing was treated as critical and urgent. Pressures and priorities had to be identified, even in an emergency response situation.

Within the dynamics of multiples of teams, how did the teams interrelate? Did senior leadership communicate with clarity, vision, and direction? Actions had to be taken over the summer and early fall months of 2009 to anticipate the impact of the H1N1 Pandemic on the Games. The capacity of the EOC had to be expanded with facilities put in place to deal with two major events simultaneously. Specific strategies had to be designed to mitigate the risk of a resurgence of the pandemic during the Games. As well, it was estimated that 15-20% of Agency staff would be unable to work due to H1N1 and seasonal flu. Shadow coaching within this short
The team continuously reinvented how it worked together by developing and strengthening collaborative partnerships to get the job done well.

timeline meant providing continuous laser coaching (shining a light) on emerging shadows that were revealed and on roadblocks in organizational dynamics. Working with individual clients and their teams, we had to identify and co-create the changes and shifts that had to take place in a very short timeline. At the same time we had to consider ways of maintaining an emotionally healthy environment in the midst of two overlapping crisis situations.

We considered how the change had to be communicated to staff and the implications of dictating change, as there was little time to co-create what would be put in place. We worked on the implications of diving into change with little or no time to design it from start to finish. There would be the potential pushback and fears staff would be operating under, and the lessons learned and best business practices that might be integrated into everyday business that had proven successful. We worked on the shift from business as usual tempo to high intensity, emergency response and the shift back to a more even tempo when both events had passed. The first order of the day was commitment, buy-in, and how to make that happen immediately. There was an immediate need for change. The design and implementation had to occur simultaneously and understand the direction and form the change would take without the opportunity to design them beforehand. Within that, I had to determine my clients’ capacity for change and thinking quickly on their feet in this intense and turbulent environment. The coaching intervention covered the following:

- Determine who would work well in an emergency response environment and who wouldn’t, as those who would struggle in the EOC would continue to work on their everyday business.
- Discuss various scenarios to determine potential impact on individuals and their teams, staff, and families as the Centre’s staff would be working twelve-hour shifts and would be told to cancel all leave.

Once the change began, my clients moved from business as usual to the EOC. The coaching framework we would work within and our mandate shifted to what emerged while in this contained, intense environment. The coaching now shifted to

- address shadows (fears, insecurities, feelings of instability, etc.) which emerged, both individually and within team dynamics;
- deliver constant, effective, and timely communication and leadership through the change process to staff to drive direction, share directives and emerging statistics. Communication had to be crafted to both inform and energize staff;
- continuously document and discuss lessons learned and best practices. These were shared internally by
those on the front lines at the EOC, as well as by and with other global organizations that could share their standard operating procedures; and

• communicate externally to other key federal departments, provincial counterparts, global health organizations, and leaders of emergency response centres in other countries. Communicate to media and to Canadian citizens.

The Centre continuously reinvented how they did their work and what they focused on. Concurrently, leadership continued to gather data from physicians, health centres, and other global emergency response centres. This included coaching them on how they retrieved, analysed, and integrated the new information and emerging best practices; and kept abreast of incoming data that would impact their work. Some of the key areas of focus were

• gathering data from physicians and other global emergency response centers and the turnaround time for passing it on and for what purpose;

• rotating people in and out of working groups and other assurances to prevent burnout in a 24/7 emergency response environment;

• continuously contextualizing change and reinventing their leadership style to meet situationally driven change; and

• maintaining an emotionally healthy and engaged staff throughout.

In addition to coaching at the various levels (individual, individual within teams, team as a unit, and inter-team), I was available twice a week for 15-minute laser coaching sessions (as needed) so staff could process issues and situations.

The opportunity to work consecutively with leaders and their teams changed to working concurrently with various divisions to deal with tight timelines and critical situations. Relevant questions included these:

• What was within their control?

• What was outside their control?

• What and who were the enablers?

• What and who were the detractors?

The timeline of these events (Public Health Agency of Canada, 2010) was very tight and determined the intensity and scheduling frequency of the coaching intervention. (see next page)

Focus of the work was both internal and external. The work I did with individuals, individuals within teams, teams as
an entity, and multiples of teams had two foci: internal to the organization and external influences. From an *internal* perspective, we looked at what the organisation had immediate control of in creating their framework and strategic direction: How did they choose the right people for specific situations? How could they continue to work with high achieveers without burning them out? I coached them using the “Dance of Change” tool to develop processes and frameworks, as well as to promote an ongoing learning and growth environment. The second area of focus was on *external* influences such as economic climate; urgencies outside the organisation; situational and geographic pressures; and attracting the best talent for how the organisation would operate during and after the change initiative.

### Table 1. H1N1 and Olympic and Paralympic Winter Games critical timelines

<table>
<thead>
<tr>
<th>Date</th>
<th>H1N1 Critical Timeline</th>
<th>2010 Olympic and Paralympic Winter Games Critical Timeline &amp; Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 18, 2009</td>
<td>Detection of severe respiratory infections in Mexico</td>
<td></td>
</tr>
<tr>
<td>April 20, 2009</td>
<td>Public Health Agency notifies provincial/territorial health authorities of two confirmed cases of new H1N1 influenza in the USA</td>
<td></td>
</tr>
<tr>
<td>April 22, 2009</td>
<td>Activation of the Health Portfolio Emergency Operations Centre to level 2 (partial activation)</td>
<td></td>
</tr>
<tr>
<td>April 23, 2009</td>
<td>Activation of the Health Portfolio Emergency Operations Centre to level 3 (partial activation)</td>
<td></td>
</tr>
<tr>
<td>April 26, 2009</td>
<td>First confirmed case of H1N1 in Canada. Activation of the Health Portfolio Emergency Operations Centre to level 4 (full 24/7 activation)</td>
<td></td>
</tr>
<tr>
<td>April 29, 2009</td>
<td>WHO raises level of pandemic influenza alert to phase 5</td>
<td></td>
</tr>
<tr>
<td>June 11, 2009</td>
<td>World Health Organization declares a global pandemic: phase 6</td>
<td></td>
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<tr>
<td>August 6, 2009</td>
<td>Health Minister announces Canada’s order of 50.4 million doses of H1N1 vaccine</td>
<td></td>
</tr>
<tr>
<td>August 29, 2009</td>
<td>First wave of H1N1 pandemic officially ends in Canada</td>
<td></td>
</tr>
<tr>
<td>August 30, 2009</td>
<td>Second wave of H1N1 pandemic officially begins in Canada. Guidelines for vaccination sequencing, availability of vaccine, inoculation centres, tracking systems, communication across the country</td>
<td></td>
</tr>
<tr>
<td>November 10, 2009</td>
<td>Largest number of hospitalized cases of H1N1 during second wave.</td>
<td>Readiness Activities for the 2010 Olympic and Paralympic Winter Games. Involvement and collaboration with local, provincial, and other federal government departments and agencies. Readiness for any potential health risks from natural events, disease outbreaks and disasters, to accidents or criminal and terrorist threats. Preparedness to provide rapid response and consequence management of health events to ensure a secure environment during the Games</td>
</tr>
<tr>
<td>February 12 - 28, 2010</td>
<td>Decreasing number of hospitalized cases. Emergency Operations Centre demobilizes H1N1 response</td>
<td>2010 Olympic and Paralympic Winter Games</td>
</tr>
</tbody>
</table>
WHAT’S TRUE? WHAT'S NEEDED?
WHAT’S AVAILABLE?

The tool I shared with my clients served as a reality check to continuously reinvent change and respond to immediate pressures. My clients had this diagram on the walls of their offices in the Centre; we used it throughout the Shadow Coaching intervention and continue to use in their day-to-day work. For each point on the graphic, numerous questions are asked. I coach them on the answers and how they answer.

**What’s true?**

We looked at what was true then about the situation, their changed mandate, their focus, and the emerging tension between an emergency response centre and Agency business as usual. Within “What’s true?” we asked the following questions:

- What is working? What isn’t working?
- What are you moving away from? What are you moving towards?
- Where was there pushback? Was there conflict? If so, is the conflict creating a roadblock to movement? What are the implications of that?
- What are the easy changes to make and what would be more difficult to change? (Identifying each would make it easier to make choices as to what had to be done first.)
The tool I shared with my clients served as a reality check to continuously reinvent change and respond to immediate pressures.

- What are the pressures and priorities right now? Are they one and the same, or not?
- What shadows are revealing themselves? (This would inform us as to what would need to be done to address these shadows.)
- What are the realistic implications to the organization and those it served?
- Who are the enablers and who are the detractors?
- Who has to be rotated out to prevent burnout and who could fill the gap?
- How is the Centre dealing with the current pressures without compromising the quality of everyday work? (The mandate of the organization didn’t change even in the midst of the crisis.)

Once the staff was split into two groups, those who would work in the EOC and those who would continue with business as usual in the Agency, we had to deal with the tension that started to occur between the two groups. The assumption made by the group that was dealing with everyday business was that they were less important and sub-standard staffers. They believed those who were chosen to work in the EOC were considered high performers. This not only severely lowered their morale but created a tension between the two groups. As a result, they operated in silos with very little collaboration.

My clients had to learn how to schedule-in their emergencies. Even in a crisis situation there were emergencies which cropped up unexpectedly. Through my Shadow Coaching, I had to be able to provoke the leader’s awareness in ways that these challenges and opportunities could be addressed immediately. Shadow Coaching added a level of depth, intensity, and an imaging (similar to what an MRI provides) that involved context, content, and team dynamics. I combined observations and contextual information that I gathered, then shared it in such a way that the client could actually see or relive it. We looked at patterns of behaviour that no longer served my clients and the shifts they made and applied behavioural changes as new situations unfolded. Shining a light on emerging shadows lessened their power and enabled my clients to acknowledge them and respond without filtering responses through these shadows.

Using the premise that they couldn’t set aside everyday commitments and deliverables while dealing with critical situations, clients not only had to work smarter, they had to think differently. A key arena of a Shadow Coach is to be able to challenge clients around how they think in a non-judgmental way. Individuals and teams must continue with their day-to-day work while integrating change. Making decisions later was not an option. Therefore, in
My clients had to learn how to schedule-in their emergencies. Even in a crisis situation there were emergencies which cropped up unexpectedly.

many ways, they had to learn how to “schedule-in emergencies”—respond to the emergency without letting the rest of their work slip. This became possible once they learned to constantly reinvent and use all the tools, knowledge, expertise, and resources available to them. Once they learned how to do this, they were so energised by this new way of operating; they enjoyed their day, no matter how intense or critical the issues were. This attitude became contagious and, in turn, motivated and energized their colleagues.

Using the Dance of Change tool helped us have the reality check conversations so clients could continue to reinvent what they had to do and how they would do it, almost instantaneously. Every day the variable “What’s available?” changed, which impacted the “What’s true?” and “What’s needed?” For example, they had more or less money at their disposal, fewer or more people to do the work, more expertise and knowledge, which impacted how they made decisions and for what purpose. This tool kept them focused and centred, validated their work, and created momentum. I helped them see behavioural drivers that served them, or not. We identified talents as they emerged as well as situations and contexts within which they could use these talents repeatedly. Clients and their teams began to fly.

We considered how to measure success and at what intervals. We looked at the status quo (“what’s true”) on a regular basis, discussed successes, what was working, and what needed to stay in place. We also looked at what wasn’t successful and needed to be changed. The “what’s true?” involved measuring

- increased or decreased efficiency. When looking at root causes and drivers, were they people-based, systems-based, or resource-based?
- faster response, delivery, and turnaround times;
- increased collaboration at all levels; and
- recognition as a centre of excellence.

What’s Needed? This question involved using the answers from the “What’s True?” question and creating a focused strategy to move forward. The coaching conversation dealt with the various areas that had to be addressed such as staff, communication, and reinforcement:

Staff-related conversations included these questions:

- What has to shift in your leadership in order to keep the staff energized and “present” in this environment?
- What is the makeup of the teams? Who are the best people to do the job and what makes them the staffers of choice? (Answering this question would help my clients determine who could be rotated into the centre to replace exhausted and depleted staff.)
• What is needed to create a supportive environment to help you through these two overlapping critical events?

• What do you need to change within yourselves so your desire to be successful through the transformative process becomes viral?

• How can you identify resistance and nip it in the bud, before it breaks down the effectiveness of the team? What might you anticipate with regards to potential obstacles?

• Who are the advocates who would support you through this initiative?

• What tools, systems, processes, and frameworks need to be changed or tweaked to support the staff through this critical time period?

• How can you become a reflective practitioner or “barometer” to be able to keep your finger on the pulse of the organization and its people?

Communication-related issues generated some of these questions:

• How are you communicating to colleagues and staff? Are you assuming others know what you are thinking?

• How are you continuously sharing successes and best practices as they are revealed?

• How are you communicating the current reality to Canadians to minimize their fear and keep Canadians up-to-date as to what is available to them through the crisis?

• Is your communication clear and consistent? Is it fear-based? Are you communicating through your shadows? (If so, we addressed this immediately.)

Reinforcement-related concerns led to this question: Are staff’s efforts validated and measured against desired outcomes or do they have to assume they are on the right track unless they hear otherwise?

In an intense environment, timelines are short and tempers are shorter. My clients had to continue to have short, to-the-point conversations with their staff to let them know they were doing great work and the impact of their great work.

**What’s Available?** We discussed what was true and what was needed but choices were implicated by the resources, information, people (network and relationships), money, time, and open attitude that were available. As people, resources, information, and other factors were made available, that shifted the “What’s true?” and “What’s needed?” questions.
The more I understood how my clients and their teams reacted to specific situations, the easier it was to recognize and pinpoint the predominant dynamic that was present at any given moment. Some of the key areas of our work, both with individual clients and their teams were identifying perception versus reality, and assumptions versus facts. I don’t coach symptoms and situations based on client’s viewpoints; I partner with clients in their work environments to bring experienced and fresh perspectives that help identify problematic dynamics, work habits, and assumptions that impede their effectiveness.

The more leadership understands the predictable nature of how people react to the dynamics of specific situations, the easier it will be to recognize and pinpoint the dynamics and trends that can be leveraged at any given moment. Then they can act to change what is not working.

We have now come full circle to the questions “What’s true? What’s needed? What’s available?” What was needed in that timeframe (since needs would have changed through the initiative)? What was available to them now that might not have been available before? This would implicate the “What’s needed?” Shadows continued to emerge as we revisited the “What’s true?” question. We were able to delve into and process the roadblocks that repeatedly emerged due to issues of ego and visibility.

**SUMMARY**

**Measuring success**

There were benchmarks and indicators by which success for the change initiative could be measured. What was the overall impact on Canadians? Did the EOC help prevent fatalities and ensure the health and well-being of Canadian citizens? Could what was implemented continue to safeguard public health? There were many ways to measure an initiative and if implemented change facilitated effectiveness and positive impact. Some of the areas that were considered were

- increase in productivity and efficiency;
- increase in stakeholders’ positive feedback and trust;
- faster response;
- increased staff retention, even after an emergency response initiative;
- attracting the best talent and growing them to be future leaders;
- staff attracting external resources into the organization; and
- recognition of peers or peer organizations.
Outcome and reflections
From the perspective of the coaching intervention, it was a very successful. Positive, measured changes in leadership style, communication, and collaboration were integrated into all their work at the Agency and continue to be used. My clients were able to manage their energy while working through crises. Burnout was minimal. They led and grew their staff (in number and capabilities), even in the midst of an emergency response. The Leadership Code that we implemented was extremely successful. They continue to use it as a Code of Conduct, even after being transferred back to their substantive positions or to other directorates in the Agency. Respect for each other remains high, and talents and newly emergent skills continue to be honed and recognized.

From the perspective of the stakeholders and those impacted through these overlapping events, it was not nearly as successful. Even though they were able to mitigate risk, lessen the impact of the H1N1 pandemic on Canadians, and be prepared for any contingency during the Games, the public’s perception was that the situations were blown out of proportion. The Agency implemented procedures to minimize and lessen the number and severity of cases. The public saw a great deal of media attention urging all Canadians to be vaccinated, use other measures to combat transfer of the virus, and implement other protective measures. These programs and procedures were so successful and there was a lower mortality rate than was predicted. However, rather than congratulate the EOC for their great work, they were criticised.

Morale was low. Staff was deflated. We had to work on issues of emotional well-being and self-worth and how to deal with public perception versus reality. In measuring the success of the Centre, looking at perception and considering how relevant the Agency is to Canadians, we explored the use of social media. We designed consistent and clear communication which would be implemented, both in their daily work as well as in the event of another crisis situation. I continue to work with leadership in the Agency to determine what the lessons were learned from the experience. As a result of a review of process, leadership style, and implemented changes, my clients learned a great deal about crisis management, exercising leadership through overlapping critical situations, and what operating procedures could be put in place as a guide and framework for the future.
RESOURCE

School of Shadow Coaching®: www.schoolofshadowcoaching.com

REFERENCES


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