Leaders. As the stress level goes up, the leader’s ability to access IQ and EQ goes down. As a result, the ability to make good decisions goes down as well. Therefore, coaching leaders to deal better with stress is critical in today’s workplace.

Q: What are some things to consider when selecting a coach?

A: There are two types of coaches. One type is an internal coach, someone from within the organization. If you choose an internal coach, be aware that sometimes confidentiality can be a concern. The leader might not be comfortable sharing some of the things he/she is experiencing in the job or having trouble with. He/she might also feel that an internal coach will not have the expertise needed to coach him/her. If a senior executive is coached by someone in HR, the executive may not feel that the HR person has the background, experience, or knowledge to provide the kind of coaching that is needed. This is particularly true as you go higher in the organization.

With the second type, an external coach, confidentiality might not be such an issue. Also, you can choose an external coach who has worked at the same role level as the leader or at a higher level to avoid the issue of not having enough experience to be a good coach. Some external coaches will have more experience than the leader being coached. You might avoid interpersonal relationship problems because the external coach won’t have the working history and knowledge of an internal coach. Some disadvantages of an external coach are that the coach might not gain specific knowledge about the organization in general or about the leader’s team. The external coach might not get to know all the players that are going to influence the

Q: How does an organization determine which leaders need to be coached?

A: In most cases, it’s not difficult to identify leaders who need to be coached. Most often, people tend to think of an underperformer as needing coaching. It is important to remember that the underperformer may already be performing at their maximum. If you’re going to coach a leader, you have to know that the underperformer has the potential to do better. If the coaching won’t help the leader perform better, you’re wasting time and money.

Coaching leaders before a promotion will help get them ready for the new role level at which they will work. Also, coaching after a promotion helps leaders work more effectively at the new level and with their new team. High performers and high potentials are always good candidates for coaching. Some type of coaching should always be in process for the high potentials so they are growing, developing and moving through the organization as quickly as possible.

As I mentioned before, organizations have become stressful places to work, especially for
success of the coaching project. These are important things to keep in mind during the coaching process.

Selecting a coach can be difficult. When you select a coach, it’s critical that there be a good match between coach and coachee. They have to get along. When I am asked to conduct executive coaching with someone, I want to know about the individual. I want to meet and talk to the person to see if we will be able to establish rapport. The leader must feel that I have the credibility to help him/her accomplish whatever he/she wants. I need to feel that the leader is motivated to make the change that is necessary to be able to move to the next level.

Other things that you look for include the coach’s qualifications and background. What are their areas of expertise? Do they have coaching certifications and/or references? Do they have the experience that is required to coach a particular leader? What kind of track record does the coach have and will that background work in a particular environment, with a particular leader?

Q: How do you begin the coaching process?

A: This is a common question. Generally, you begin by assessing the leader you will be coaching to get a baseline or starting point on which to build. There are hundreds of assessments from which to choose. Typically, when coaching a leader, I use some type of Emotional Intelligence instrument, such as the EQ-i®, which is valuable for gaining information about how a leader interacts and works with people and manages emotions. I also use a personality assessment, such as the Myers-Briggs Type Indicator® (MBTI®), to understand the leader better and how he/she might behave in different situations.

I like to use a 360-degree assessment for leadership and/or Emotional Intelligence, based on how difficult I think it’s going to be for the leader to accept the feedback I’m going to provide and how it compares to his/her own perception of current performance. A 360 assessment can provide reality testing for the leader. Some type of leadership assessment can be used to see how well the leader is actually leading in the organization and the styles he/she uses for leading.

I conduct in-depth interviews with the leader so I can explore how he/she operates, the kinds of situations he/she is being exposed to, the relationship to the boss, peers and direct reports. This also allows me to explore with leaders how well they think they fit within the organization. I also incorporate observations—attending meetings with the leader, following the leader to watch interactions with peers and direct reports. This gives me a better understanding of their needs in each particular case.
Q: Which coaching methods do you recommend?

A: There are several different ways that you can coach someone. Often the most effective is face-to-face coaching. You can watch the leader, read body language, communicate more effectively, share feedback reports, answer questions and continue to build rapport. This can become expensive when you add in travel and time, but face-to-face is probably still the most effective option for coaching.

Coaching can be done through video conferencing. Today’s technology and video conferencing allow you to interact on screen; you can see each other, talk to each other and share reports on the screen. Coaching by phone has been used for years and is another alternative that allows you to reduce the expenses associated with coaching. It’s not as effective as the first two options, but is a cost-effective option to add to the mix.

You can incorporate all of these methods into a blended approach, using some face-to-face coaching augmented with video conferencing, phone calls and emails. Often a blended approach, designed around the leader’s time and budget constraints, will be the most viable option.

Q: How do you know if you’re successful? What kinds of metrics do you use in coaching projects to track results?

A: Coaching metrics are very important to the overall success of leader coaching. Establish coaching goals and objectives based on desired outcomes. Using the SMART (Specific, Measurable, Achievable, Realistic, Time-oriented) technique, the metrics can be behavioral and you can tell the individual leader which specific actions you want to see. One measure of success is when other people in the organization provide unsolicited feedback about perceived changes in the leader’s performance. It is critical to have milestones along the way so a leader can tell if he/she is making progress or if you need to back up and try different techniques to help the leader move forward.

Q: From a coach’s perspective, what are some things the coach should be aware of?

A: Coaches need to be aware of potential pitfalls in the coaching process. These will change to some degree, but they can all occur and could cause an unsuccessful coaching engagement if not guarded against. Here are some of those pitfalls and thoughts and recommendations that can help coaches be more effective:

1. **The coach/coachee mismatch.** If you don’t get the match successful the first time, you’re probably not going to have a positive outcome. Make sure you put the right coach with the right leader.

2. **Not having accountability.** The leader must be accountable for participating in the coaching and accomplishing the objectives. Otherwise, it won’t work. If there is no accountability, the leader will miss meetings, not complete the homework assignments and, eventually, won’t do anything.

3. **Not having goals.** Without goals, you don’t know where you’re going, you don’t have a way to hold the leader accountable or measure the progress.

4. **Lack of motivation on the part of the coachee.** If the leader is not motivated to change behavior, to become more successful or to pick up the skills you’re trying to teach, then the coaching engagement won’t be successful. You can watch motivation fluctuate up and down during the coaching process, and if you see it dip, you have to know how to get it back on track again.

5. **Not addressing the individual’s stress level.** Leaders undergoing coaching will have some degree of stress. It might be relatively low, but in many cases, you are coaching them because something has gone wrong, and their stress level has gone up as a result. It could also be that the leaders want to improve performance so much that the stress level has gone up. Addressing the stress allows you to...
communicate more effectively and help the leader make more effective decisions. The outcome will be more successful as a result.

6. **Not using a systems approach.** By systems approach, what I mean is that the leader is part of a system in the organization. He/she has a boss, direct reports, and in many cases, peers. All of that is part of the human system that is embedded in the organizational system, which includes role levels and interaction with people outside the team, such as customers. All of this is part of a system. In order to be successful with coaching, you have to collect and address information from the other system components to help you work with the leader.

7. **Not knowing your limitations.** You’re a coach, not a therapist. If a leader needs therapy, you need to refer the person to EAP. You must know what you’re capable of doing and what is not appropriate in your role as the coach.

8. **Confidentiality.** There will be things shared in the coaching relationship that you can’t share outside that relationship. This needs to be clear up front when you accept the coaching engagement. It must be clear with the individual leader what information can be shared and what will not be shared.

9. **Not knowing when to stop coaching.** Sometimes a coach continues a relationship with a client beyond the point of being helpful. You need to know when you’ve done all you can do and when it’s time for the leader to move on or for a different coach to work with the leader.

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**Meet the Expert**

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