

## [introduction to Organizational Coaching](#)

### *Basic Reflexions and a Case Study in Systemic Organizational Coaching*

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This article is part of a series on the subject of organizational coaching. It is inspired by years of experience using a systemic approach within numerous companies including coaching very large groups composed of numerous teams originating from the same organizational system. The object here is to present several essential facets concerning the very specific art of organizational coaching.

A relatively simple example of work with a reasonably large group will serve as introduction to present the context of organizational coaching and make a first inventory of what we consider some fundamental principles of the field. The example is a real and almost accidental case study. As this experience is exposed below, a few answers will be suggested to the following questions:

- What is organizational coaching?
- How is organizational coaching different from executive coaching, team coaching or executive team coaching?
- What are the indications and counter-indications of organizational coaching?
- How is organizational coaching different from other types of organizational development processes, and what defines it coaching?

So as to offer other useful elements for those who accompany large systems such as corporations, we will cover a number of practical issues such as:

- What are some specific operating principles of organizational coaching?
- What are some common mistakes or traps to avoid when coaching large systems and organizations?

To illustrate and explain our approach of organizational coaching, this case study is first summarily presented, and then gradually unfolded as we progress. It took place over fifteen years ago in a major company in the European hospitality industry. At the time this experience took place, most of the higher layers of the organization had already been extensively introduced to what is today referred as team coaching processes. At the time, however, organizational coaching was not even conceptualized. Consequently, if the experience described below took place spontaneously, it presents numerous characteristics of a process we could call today an accidental form of organizational coaching.

#### **The limits of procedures in coaching**

As a preamble, it is useful to guard against hasty interpretations of the objectives of this presentation. Indeed, if the above objectives can elicit obvious interest from all professionals in the coaching and organizational development fields, they also present reasons for caution. Experience reveals that all attempts to define coaching processes too precisely could rapidly have a limiting effect. Over-defining the art of coaching within a restrictive set of procedures could ultimately amount to elaborating non-productive constraints.

Let us remember that by definition, a coaching relationship rests on an emerging process that is co-developed with the client while the relationship unfolds. Coaching rests on a philosophy by which the coach is constantly adjusting his or her pace to accompany the client, while the latter strides on to reach performance results. Consequently, a true coach is attentive to the progress of the client and to all the client's needs, constantly questioning the coaching process to best suit the client's work issues and objectives.

- Caution: Should one attempt to over-define and over-regulate the art of coaching, the real risk is to destroy the fundamentally emerging nature of the process. To stay effective, a coach displays just in time adaptability to the client's quest which should be perceived as essentially unpredictable.

It follows that with each particular client, the art of coaching is a fundamentally open, adaptive and evolving approach. Consequently, all attempts to define coaching processes too precisely by establishing an inventory of definitions, operating procedures and predictable formulas for success could rapidly lead to a dead end. Indeed, any methodical approach would become too constraining for the process, the client and the coach. It would limit the essentially emerging, creative, often surprising and sometimes magical dimension of a successful coaching process.

As a consequence, our present objective to define fundamental principles of organizational coaching and to follow with a presentation of basic operating principles could well be a paradoxical endeavor. Let us insist that the goal of this text is not to define organizational coaching as a formal approach. Our objective in this chapter and the rest of this book is to share reflections that rest on numerous professional experiences so as to distill a few structuring conclusions. We hope these will be perceived as temporary summaries offered as food for thought while we progress exploring the field.

To conclude on these words of caution, we will summarize that there are maybe no definite principles for organizational coaching, as yet. If they do exist today, they strongly depend on the context of the concerned players, of the specific contract between a coach and client organization, and on the operating principles that are elaborated in the field or in situ to respond to emerging client needs.

Consequently, depending on the organization, the people, the objectives, the situations, the unfolding processes, the relationships and the inspiration of the moment, all the principles and techniques presented below should merit immediate questioning. In short, this book aims to present contradictory and sometimes paradoxical reflections that aim to provoke thought, questioning and debate. Having formulated these essential words of caution, we can now proceed to present some temporary foundations and operating principles which may apply to organizational coaching.

### **What is organizational coaching?**

If executive and career coaching essentially accompanies professional individuals, and if team coaching essentially concerns a leader and all his or her immediate reports, then organizational coaching addresses the immediate next level of complexity which concerns a larger structured ensemble of teams.

In a similar fashion, if individual or life coaching concerns personal and private issues and family coaching addresses collective issues presented by all the members of a same nuclear family, organizational coaching could concern the issues of an enlarged family, the inhabitants of an apartment building, or of a larger community.

Organizational coaching directly concerns one specific level of complexity: that of a large formal system composed of structured sub-systems, each of which are in turn composed of individuals. When organizations are defined as a team of teams, or as a meta-team, they are potential clients for organizational coaching.

Consequently, organizational coaching can simultaneously concern forty to several hundred persons simultaneously if they are all originating from the same formal collective system, representing several layers of responsibility, organized in structured teams.

Organizational coaching can take place when all these employees are united in an appropriate environment to undertake collective work centered on their collective goals or ambitions as a system. In this temporary coaching setting, the collective entity is accompanied as it undertakes work on its short, medium or long-term issues as an undivided whole.

- Caution: In general, a coaching approach is fundamentally different from other existing accompanied organizational work. It is not the equivalent of a convention, of enlarged team building, of group therapy work, of large informative meetings, of collective motivational events, of speeches delivered by public speakers, etc.

Organizational coaching unites a very large formal system composed of coherent sub-systems around measurable operational objectives. It is generally focused on such subjects as collectively defining the organization's evolution, facing a particular crisis situation, undertaking a fundamental transition, restructuring the whole system, achieving extraordinary results, designing and implementing new operational processes, facing an exceptional challenge, etc.

### **Organizational coaching context**

To achieve this type of objective, organizational coaching is a fundamentally emerging process. This implies that the process is not predetermined, but is designed as the work unfolds and as the group progresses towards reaching its goals. Very specifically, this means that during an organizational coaching process over two days, there is no predefined program or agenda. Consequently, each organizational coaching event usually produces extraordinary and unexpected results, both in terms of process and in terms of measurable outcome. These are specific to each organizational coaching process and to the concerned organization.

This is how an organizational coaching process creates a space for the collective client to deploy energy, to discover potentials, to design processes, to ask the right questions, to find the correct solutions, to elaborate performing action plans. In effect, to achieve the above, an organizational coaching process is identical with individual coaching, except that much as one would witness when playing a symphony, the work concerns the orchestration of a very large group.

To be effective, a successful organizational coaching event is ultimately focused on conceiving and implementing detailed action plans complete with measurable goals and follow up procedures to ensure success. These help translate new collective perspectives into practical decisions and timely results. Consequently, organizational coaching is a resolutely operational process.

- Caution: If individual coaching is focused on individual results and if team coaching is focused on team achievement, then organizational coaching is also focused on organizational challenges. These concern the system as an entity or as a whole.

The object of a coaching event that regroups all a company's top key players and all their pertinent teams is to treat the whole system as a single unitary entity. For the organizational coach or team of coaches, this approach positions the whole organization as the single real client.

Consequently, depending on the stated objectives, even if the whole organization is not present during a given organizational coaching event, this event can affect the whole system through the active involvement of a very large pertinent group. In a formal way, the present employees and teams are mandated by the organization to achieve an objective that concerns the whole system. The people and teams ensure the achievement of goals that concern the organization as a whole.

## A case study

Consider the case of a company active in the European hospitality industry whose network includes nearly six hundred small hotels. The twenty-five regional managers who managed that company's network requested the presence of a coach during a two-day operational meeting they wished to organize. The agenda of their meeting was centered on a number of their common issues and focused on taking a number of decisions that would ensure better transversal collaboration to achieve an increase in financial results.

Even if they formally belonged to the same organizational level and had similar operating issues, these twenty-five directors seldom had a chance to work all together. As a whole, they formally belonged to different national and international divisions and reported to a number of different members of the executive team.

Beyond a team-coaching request, the company-wide nature of the group and the level of ambition they wanted to achieve positioned their need clearly within an organizational coaching context.

### Establishing the contract for the coaching event

In this case study, it is useful to share some of the communication that occurred during the negotiation preceding the event.

Immediately following a first call by one of the regional managers to agree to the coach's presence, set general goals and a tentative date for the event, the coach received another call from the company's Executive HR. He was quite concerned by the turn of events. He shared his questions:

- What is the meaning of a meeting that would include a number of regional managers who formally belong to different notional divisions, who do not report to the same executive?
- What is the risk for the organization if no executive is present in this meeting?
- How can the executive team be sure that the meeting work and conclusions are in keeping with the organization's policies and strategy?
- Etc.

This call from the executive HR was quite revealing. Note that the coach knew the organization quite well, having previously accompanied the executive team and a number of divisions in numerous more local national team-coaching events. The coach reminded the Executive HR that if this new even appeared original and maybe even out of line, it was in keeping with the organization's stated goal of developing initiative and empowerment at all levels.

If indeed, the regional directors judge that it is useful for them to establish better transversal cooperation to increase their operational effectiveness and financial results, the initiative seems to be quite positive. It seems that the objective to develop better operational alignment and collaboration across national boundaries and through internal divisions on lower levels in the organization could not be such a bad idea. It seems that the executive team should find a number interesting reasons to support such an initiative.

Note: The strategic function of organizational coaching is to accompany organizational operational development and measurable results, oftentimes in spite of executive team resistance to change. Coaching larger segments of the organization often creates an productive energy surge that the executive team cannot entirely own nor control.

To be sure, the initiative can also surprise the country managers who could perceive the process as one that could ultimately question their control. It could even worry the whole executive team if all the regional directors would conspire to question its authority. Also, if the regional managers gain in competency and credibility, they may have an influence on the equilibrium of power within the executive team. They may obtain more direct attention and support from the CEO.

Considering the maturity of the regional manager population and the evolution of the whole organization towards positive and responsible results-oriented culture, however, these concerns did not seem to rest on valid facts. Following a discussion between the coach and the Executive HR and an ensuing discussion within the executive team, a number of decisions were made:

- The principle of a two-day coaching event for benefit the twenty-five regional directors was accepted.
- The twenty-five directors were asked to furnish a detailed list of all the objectives they wanted to achieve and of the agenda items they wished to cover.
- The group of regional managers was asked to forward to all the members of the executive team a list of the decisions they made and of the corresponding action plans immediately following the two-day meeting, for information and validation.

Considering the clarity of vision of the company's CEO, there is a good chance that he had been quite instrumental in the final executive team decision.

### Comments on contracting

This introduction to the two days can suggest a few comments on the criteria that can characterize successful organizational coaching events.

- First, as this case study can illustrate, an organizational coaching event can be initiated and implemented by any level within a given organization, and not necessarily by its executive team. This does imply, however that the objectives of the event are in keeping with the concerned organization's vision and mission.

In our case, the fact that this action was initiated by a whole operational intermediate management level is both rare and an extremely positive indicator. Very few organizations can produce a transversal population so completely and spontaneously committed to taking collective action to become more performing. There is little doubt that this population is more motivated than if it were to implement the same process, but under executive team initiative and control.

- Second, an organizational coaching process must be validated and followed up by the executive team if not directly by the CEO. It would be difficult to imagine that such an operation could have a lasting positive effect on the whole organization if the executive team was to be kept out of the decision loop.

In our case study, it is probable that the initial almost defensive reaction verbalized by the executive HR was an expression of what the operational executive team members felt. To be sure, it is highly probable that the operational executives took the regional manager's initiative to cooperate across international boundaries as a frontal assault on their territorial prerogatives. Only after discussion and a probable final decision by the CEO did they agree to give the original idea a chance. Consequently, the initiative provoked both resistance and reflection in the executive team before it had even started.

### **The session agreement**

A few days prior to the meeting, the coach had received a copy of the agenda. Without any more preliminary meeting or any other preparation, the coach arrived on the expected date to accompany the twenty-five regional managers for the programmed two-day meeting.

Work started immediately at the expected time. The group had a relatively simple meeting architecture: The participants had decided to work all together, convening in a large group. Indeed, if they wanted to develop collective coherence, sub-group work had to be ruled out. Everyone was quite aware that running a meeting with twenty-five participants was quite a challenge, so all were very concentrated to make the event a success.

From the start of the meeting, the coach chose to seat himself within the group, among the other participants. The group had designated a facilitator, a pacer, and a decision-driver focused on constantly eliciting and recording group decisions. The group of regional managers immediately focused on unfolding their pre-established agenda, item by item.

After about twenty minutes of intense work, the coach interrupted the group to elicit a clearer agreement. He needed to define more precisely what was expected of his presence. Was he to focus solely on process to help the group improve their interfacing within the meeting, should he intervene to question some of the operational content of the meeting, or again could he volunteer input in both these dimensions?

- Note: So as to involve the group in the coaching process itself, it is generally useful to clarify what type of coaching input the collective client may expect. These process agreements provide both the client and the coach an operational framework for their work together.

In this case, the general contract to ensure the coach's presence and to define the objectives for the two days was clearly established, but the details of the work process had not been ironed out to define exactly what type of input the coach could volunteer. Could he offer questions just on their work processes, only on their operational content, or in both these dimensions?

A large majority of the regional managers had previously experienced team coaching within their intact teams, both with their country managers and as managers with their own regional teams. They were already aware that the coach would limit his inputs to accompany their energy while they worked on their own process and focused on achieving their own objectives.

Without focusing on the coach, they were fully aware of their issues and prepared to profit from the two days to achieve their goals together. Considering their experience with coaching and their trust in the coach they had chosen, they offered a relatively open answer. One of the participants simply proposed the coach offer questions and perceptions on whatever he felt was useful, both on group interactive processes and on operational content. Without much more discussion, the group re-focused on the work as if it had never been interrupted.

### **Successful delegated work**

The ensuing meeting process took place without unexpected interruption. The group demonstrated extreme effectiveness that showed a high level of commitment and excellent mastery of meeting processes. They were collectively participative and creative, and each knew how to volunteer pertinent information at appropriate times to ensure collective progress. All the agenda items were covered and each was concluded with a series of practical decisions with volunteer pilots to ensure follow-up and measures to evaluate results.

On two occasions, the group considered breaking up into smaller project teams to facilitate participation and make progress in a more dynamic way. In spite of the obvious difficulty in working in a large group, that option was ruled out both times to favor the development of a common identity and collective commitment.

Respecting the group architecture and process, the coach volunteered occasional questions and perceptions both on the content of the discussions and on the group work and meeting process.

From time to time, the coach intervened to ask a question centered on the process of the meeting or on the participation. This was done either to help the group refocus or to suggest letting loose.

- "Several participants, including maybe myself, are demonstrating a lowering of energy. Is this because of how we are dealing with the subject,

or because we need a break?”

- “What do you usually do when two or three participants monopolize the discussion?”
- “I cannot understand how the discussion we are having is linked to the item we are covering on the agenda. Is this clear for all of you?”
- “What formulation could we give to this decision in order to get majority approval?”
- “How can we support the facilitator and pacer a little more, during this heated debate?”
- Etc.

The questions on the content were put to enlarge the debate, create new perspectives, challenge routine processes, provoke creativity, etc. All these were proposed within the limits of the defined agenda.

- How could you better communicate your best practices on a regular basis without having to physically meet?
- How can you present your projects to the executive team in a way that clearly underlines quality and financial improvements?
- How can you create an environment where your direct reports (hotel managers) will also take initiatives in the way you are doing now, on their level?
- How can you become a pool of resources so efficient that the executive team will call on you on a regular basis to participate in strategic research projects?
- What could you design and propose to inspire and implement better company internal and external communication?
- Etc.

Caution : Participation in the content of a meeting needs to be done with precaution to stay within a coach frame of reference.

- The coach volunteers ideas or options only in the form of open and creative questions.
- The coach doesn't answer questions that are put to him to elicit more information, but redirects them to other members of the meeting to reinforce energy flow.
- The coach never enters a debate to support or defend a point of view or an idea.
- Coach questions are both focused on enlarging reflection on strategic options and on creating very solid and practical action plans.

Among others, these organizational coach attitudes and behaviors are identical with those of an individual or team coach. A coach posture is basically the same, no matter the nature or the size of the client group.

Notwithstanding the examples above, the two-day meeting process was extremely efficient. This gave the coach the feeling that he was of little use. The group manifested a great capacity to progress, staying centered on its objectives and achieving its desired outcomes. Each subject was extensively covered, the agenda time frame was well respected, and numerous decisions and action plans were well formulated and recorded. To top it off the whole process unfolded with occasional jokes, good humor, friendliness and high spirit.

The coach is conscious both of the extremely advanced level of the group's maturity and of his own tendency to try and justify his presence. After he realized that the group could manage its own processes very professionally, the coach mostly focused on volunteering content-oriented questions and reactions, much as would have done any other creative participant.

### **The coaching space**

At the conclusion of the two-day process, during a more private conversation with three of the regional managers, the coach decided to share his doubts about bringing any really measurable added value to the group process and operational content. He underlines his perception of having witnessed a very performing group, and his feeling of having done very little to add a measurable difference. The three regional managers gave the coach a few precious responses.

- “We didn't necessarily choose you as a coach for what you do. We chose you for what you don't do.”

This remark is completely in keeping with the accepted posture of a professional coach, as it is implemented in individual and team coaching. A coach doesn't input content such as would an expert or a trainer. Nor does a coach drive, push or pull the client in any determined direction. The art of coaching simply consists in providing clients a space or an arena within which they can expand, deploy, grow and progress in the direction, in the manner and at the speed they decide. This space is in effect what the organizational coach had provided.

- “If you had not been so present during our work, we would not have been as focused and as effective.”

This comment underlines the importance of a coach's very attentive and silent presence. This focused presence witnesses client growth and adds value to the client work and development. It permits client progress in a radically different way than if the coach was absent and the client alone.

By paying attention to the client work, the coach validates its focus. By listening attentively, the coach models and supports the development of that skill within the group. By displaying positive energy, focused on results, the coach accentuates that solution focused energy within the client system. By being a warm and respectful witness of the client's interactions, the coach invites all the other participants to act likewise. In short, the quality of the coach's presence is in itself the added value brought to the client system to accompany it towards success.

- “If you had helped us in a more active way, we would not have discovered that we have this potential in us, and that we could probably do the same thing without you.”

This third comment underlines the real added value of coaching. When a coach just supplies open and safe learning environments within which client

systems can focus on their goals, these will discover, deploy and tame their own potential. The coach must refrain from helping, giving, explaining, or carrying the client in any way. Only then can the client rest on their own potentials and develop their own competencies, out of dependencies with the coach. This coaching space provides clients an open arena to take giant strides in directions which they previously ignored.

These last reflections can elicit a number of questions that directly concern organizational coaching.

- If it is the coaching space that permits client growth, what could be different architectural forms of that coaching space ?
- How can the coach posture and positioning have a positive or limiting influence on the client work and growth process?
- How can a coach use the coaching setting and environment to better permit extraordinary client work and progression?
- How can the coach and client modify the environment's architecture to permit better client work and achievements?

The answers to these questions are essential when accompanying complex systems with a coaching approach. Indeed, the larger the group in presence during an organizational coaching event, the more important becomes the effect of the architecture on the group's work and results. When working with groups of up to several hundred employees, one of the most important competencies for an organizational coach is to know how to orchestrate variations in the work's physical configuration:

- How much large group or plenary session? How much small group or breakout session? What criteria for determining who participates to each? How are these different groups to be moderated? How are the breakout group results shared? How are time slots allotted to each sequence, etc.

In keeping with organizational coaching frame of reference, original answers to these questions will be provided in another chapter dedicated to the architectures of organizational coaching.

En ce qui concerne cette action de coaching d'une équipe transversale comprenant tous leurs directeurs régionaux, les résultats furent un grand succès, dont les effets furent mesurables dans la durée. L'équipe des directeurs a continué à agir de concert à la manière d'une « équipe projet » transversale, responsable de la mise en œuvre et du suivi de toutes les stratégies décidées par la direction. Cette force opérationnelle qui traversait toutes les frontières internes de l'organisation, voire les frontières nationales des pays concernés, permis le déploiement d'une grande cohérence internationale de l'ensemble de l'organisation.

Soulignons toutefois que cette expérience eut lieu au sein d'une organisation qui avait déjà mis en œuvre de nombreuses actions de coaching d'équipe dont un certain nombre au sein même du comité de direction. L'action relatée ci-dessus s'inscrivait au sein d'une démarche de longue haleine qui peu à peu avait permis à l'ensemble des équipes de gagner en maturité et efficacité. Le chapitre suivant aborde ce point essentiel qui concerne l'implication et l'engagement nécessaire par un comité de direction afin de réussir un processus de coaching d'organisation.