

Expanding the Value of Coaching **- by Howard Morgan, Phil Harkins and Marshall Goldsmith**

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Joe Smith is the President and Chief Executive Officer of Clarkson Products. Clarkson Products is a key division of Clarkson Enterprises and employs over 40,000 people. Clarkson Enterprises is a "Fortune 100" company that employs over 100,000 people and is a leader in its industry.

I had the opportunity to work with Joe as an executive coach for over a year. Although I am not sure how much Joe learned from me during this period, I learned a lot from him and from his team! I hope that the great work done by Joe and his team gives you a few ideas that you can use, either as a coach or as a person being coached.

This real life case study shows how an executive can expand a simple coaching assignment to benefit his team and the entire company. I hope the article also reinforces my observation that the most important factor in executive coaching is not the coach. It is the executive being coached and his or her co-workers.

Getting Started

My coaching process is somewhat unusual. My mission is to help successful leaders achieve positive change in behavior: for themselves, their people and their teams. I work with my clients and their managers to determine:

- 1) who are my client's key stakeholders
- and 2) what are the key behaviors that my client wants to change.

The company pays me only after my client has achieved a positive change in key behaviors as determined by key stakeholders.

The project began when I met with Bruce Jones, the CEO of Clarkson, and Mary Washington, the EVP of Human Resources. Bruce was clearly a "fan" of Joe's. He let me know that Joe was a fantastic leader who had produced consistent results. He felt that Clarkson would benefit if Joe played a greater role in reaching out across the company and building relationships with his colleagues in other divisions. Mary agreed that Joe was a key resource for the company and that the entire company could benefit from his increased involvement. Clarkson, like many of my clients, is trying to increase synergy across divisions and build more teamwork across the company.

When I first met Joe, I was impressed with his enthusiasm and love for his job. He was clearly in a place where he wanted to be. Joe was very proud of what Clarkson Products produced and proud of the people who worked with him. I have worked with over 70 major CEOs. I have met a lot of committed leaders. Joe is one of the most committed leaders I have ever met.

Joe liked the design of our coaching process. He developed a list of key stakeholders and called Bruce to validate his list. He decided to work with me.

Collecting Information

I conducted one-on-one confidential interviews with each of Joe's pre-selected stakeholders. Both colleagues and direct reports agreed that Joe was brilliant, dedicated, hard working, high in integrity, great at achieving results, well organized and an amazing leader of people.

Joe's peers felt that the company could benefit if he did a better job of reaching out and forming partnerships with them. Some believed that Joe and his team were so focused on achieving results for the Products division that they hadn't placed enough emphasis on building synergy and teamwork across the entire Clarkson business.

Joe's direct reports agreed that Joe, his team and the company would benefit if the Products team did a better job of reaching out across the company. They also wanted Joe to focus on making sure that everyone felt included. Some mentioned that Joe was so focused on achieving his mission that he could (unintentionally) leave out people or ideas that were not on his "radar screen".

All of the interview data was collected by topic, so that no individual could be identified. After reviewing the summary report of the interviews with Joe, he agreed that he wanted to work on "reaching out across the company and building partnerships with colleagues" as a personal goal. He also expanded the goal to include his entire team.

Joe also decided to work on "ensuring involvement and inclusion" with his direct reports. Joe checked in with Bruce and both agreed that these were worthwhile goals.

Involving Team Members

Our research on behavior change is clear. If leaders get feedback, follow-up and involve their co-workers in the change process, they get better. If they don't follow-up and involve their co-workers, they usually are not seen as improving.

As part of the coaching process, Joe had one-on-one discussions with each of his colleagues and direct reports about what he had learned in his initial feedback. He thanked them for their input, expressed gratitude for their involvement and positive comments, openly discussed what he wanted to change and asked them for their ideas on how he could do a great job.

After the initial discussions with his direct reports, Joe made a minor modification in one of his goals. He decided that his direct reports wanted him to do a great job of "inclusion and validation". The Products Division was going through very turbulent times. Several of Joe's team members wanted to make sure that he was "checking in" with them and validating that they were headed in the right direction during these changing times.

While I always recommend that my coaching clients follow-up with their key stakeholders to get ongoing ideas for improvement, Joe came up with a much better idea. He got his entire team involved! Not only did Joe pick key colleagues to connect with on a regular basis, so did everyone on this team. This expanded the benefit "reaching out" far beyond anything that Joe could do by himself. In fact Joe's team established a matrix with ongoing process checks to ensure that everyone was "sticking with the plan". All members of Joe's team talked about whom they were contacting and what they were learning on a regular basis. They shared information with each other to help improve cross-functional teamwork, synergy and cooperation.

In the area of ensuring inclusion and validation with direct reports, Joe developed an amazing discipline. He would consistently ask, "Are there any more ideas that we need to include?" and "Are there any more people that we need to include?" at the end of each major topic change or meeting. This gave everyone a chance to reflect and made sure that everyone had the opportunity to make a contribution.

Often in the meetings of high-level executive teams (like Joe's), there is an "outer ring" of people who may attend meetings. These are people who may report to team members and may be providing information on key topics that are going to be discussed.

Not only did Joe reach out to make sure that his team members were included, he also reached out to ensure that everyone in the room was invited to participate.

Over the course of the year, I had follow-up discussions with Joe's direct reports. Not only did Joe pick an area for personal improvement, each one of his direct reports did as well. This way the process of change not only benefited Joe; it benefited everyone.

A couple of his direct reports showed great maturity by telling Joe, "When we started on this process, I was critical of you for not being inclusive. In the last few months, you have been doing everything that you can do to include people. You have asked me for my input on a regular basis. I have to admit something. You weren't the problem in the first place. Sometimes I just wasn't assertive enough to say what I was thinking. It was easier for me to blame you than to take responsibility myself."

A Year Later

At the end of the coaching assignment, I had the opportunity to interview each of Joe's 15 direct reports and his 10 colleagues from across the company. They were asked to rate his increased effectiveness on each item on a "-5" to "+5" scale (with "0" indicating "no change"). Not surprisingly, his improvement scores were outstanding. 40% of all numerical responses were a "+5" and over 85% were a "+3" or above. No individual had a negative score on any item. I have seen hundreds of reports like this. These scores were exceptionally positive.

In "reaching out across the company and building partnerships" both his direct reports and colleagues were extremely satisfied with his progress. They commented on his ongoing dedication to being a great team player. They noticed how he had "gone out of his way" in meetings, phone calls and e-mails to be a good partner.

In "ensuring that his team does a great job of reaching out and building partnerships", his scores were equally positive. Both groups commented on the ongoing process that he put in place with his team. In fact, some of his direct reports commented that their colleagues across the company had also started becoming better team players. (It is much easier to be helpful and supportive to someone else, if they are trying to be helpful and supportive to you!)

In "ensuring validation and inclusion" his direct report scores were not just positive; they were amazing! His fifteen direct reports had over 100 positive comments and nothing negative to say. They almost all talked about the value of his asking for input on an ongoing basis and including everyone who was involved in the decision.

Like many companies, Clarkson's business was dramatically impacted by September 11 and its aftermath. This was an extremely hard year for Joe, his team and his company. Many of his team members noted how easy it would have been for Joe to "lose it" and not reach out to others during this tough time. He had every "excuse" not to put in the time. They were amazed at his ability to involve, inspire and motivate people when times were so tough. Some of the written comments were more than positive, they were moving.

Learning Points for Coaching

The key variable in determining the success of coaching is not the coach; it is the person being coached and their co-workers.

Joe had greater challenges and problems than almost any of the people that I have coached. In spite of this, he achieved outstanding results in building relationships with his colleagues and being inclusive with his team. He didn't get better because I did anything special. In fact, I have put in much more time with people who have achieved much less. He reinforced an important lesson for me (as a coach) I only work with people who care!

As a person who is being coached, never put the responsibility for your change on the coach. It is your life. Like a personal trainer, the coach can help you get in shape. You are the one that has to do the work.

Not only was Joe a model of ongoing dedication and commitment, so was his team. Every team member had a positive, "can do" attitude toward improving teamwork across Clarkson. Joe's positive results were not just a reflection of his efforts; they were a reflection of his team's efforts.

True long-term change requires discipline over time and process management.

One of the great false assumptions in leadership development is, "if they understand, they will do". If this were true, everyone who understood the importance of going on a healthy diet and exercising would be in shape. Every executive that I meet is smart. In terms of behavior, they all understand what they should do. Joe did it!

Joe established an ongoing process and discipline and "stuck with it". He managed a process. He made sure the follow-up discussions were scheduled. He had the discipline to ask, "Are there any people or ideas that we need to include?" over and over again. Joe worked with Carrie, a great executive assistant, who helped keep him and his team on track.

By involving team members and key stakeholders, the value of the coaching process can be increased exponentially.

Not only did Joe get better, everyone around Joe got better! Joe's entire team was involved in the process. Everyone in his team reached out across the company to build partnerships and increase synergy. Everyone on Joe's team picked personal "areas for improvement" and focused on getting better. Many of the members of Joe's team began to implement the same process with their own teams. In some cases, people across the company began reaching out to Joe's team in a much more collaborative way.

Joe was given a simple challenge to change his own behavior. Through his effort at personal improvement, Joe ended up benefiting hundreds of people across Clarkson.

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Dr. Marshall Goldsmith was recently named winner of the Thinkers50 Leadership Award (sponsored by Harvard Business Review) as the world's most influential leadership thinker. Along with being recognized as the #1 leadership thinker, Marshall was listed as the #7 greatest business thinker in the world. What Got You Here Won't Get You There was the #2 bestseller on the INC Magazine / CEO Read list of business bestsellers for 2011. This is the fifth year in a row that What Got You Here Won't Get You There was in the top ten. MOJO was listed at #19. This is the second year in a row that it has been in the top twenty.