

# A Holistic Approach to Coaching

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## Summary

While there are numerous ways that coaches can help managers become more effective, there are at least three key capacities that are important for overall effectiveness—competence as a leader, a sense of well-being, and methods for maintaining productivity over the long term.

This paper highlights three models—a leadership model, a holistic health model, and a time and productivity model—that coaches can use as assessment tools or lens to ascertain what is currently working well for a manager and what is missing or needs to be strengthened. When used together, the models become part of a powerful toolbox for coaches who want to help executives lead and to do so in ways that produce greater impact and personal satisfaction.

## Introduction

In beginning to coach a manager or executive, a helpful guiding question is: How can I help this manager be most effective? While there are numerous ways that coaches can help managers become more effective, there are at least three key capacities that are important for overall effectiveness—competence as a leader, a sense of well-being, and methods for maintaining productivity over the long term.

In working with managers on these points of focus, there are three models, all relatively simple, that coaches can use as assessment tools or lens to ascertain what is currently working well for the manager and what is missing or needs to be strengthened.

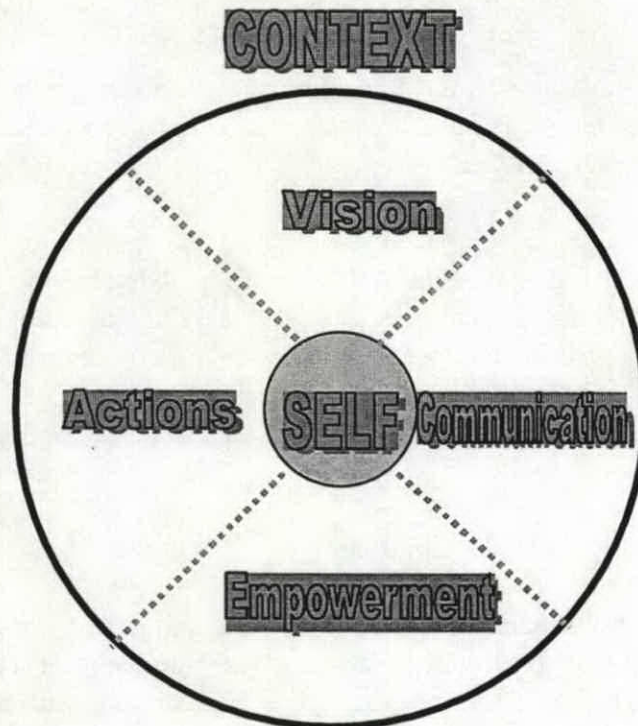
This paper highlights the three models: (a) A leadership model; (b) A holistic health model; and (c) A time and productivity model and provides guidelines about how to use them in coaching a manager or executive.

## Leadership Competence

The first model is a leadership model developed by the Center for Creative Leadership (CCL) in Greensboro, N.C. The model includes six components (see Figure 1):

1. An understanding of the organizational context within which one is working;
2. A vision of what the leader wants to accomplish;
3. Ability to communicate the vision;

4. Ability to empower oneself and others to carry out the vision;
5. Taking actions that support the vision; and
6. Taking care of the self. Coaches can use the model both to educate managers about the components of leadership and as a lens to assess where an individual manager thinks his or her skills are strong and where they could be strengthened. Following is a discussion of each of the six components of the model.



**Figure 1.** Leadership Model

### The Context

The model presumes that all organizational work takes place within a particular context, highly influenced by such things as organizational culture, the market place, corporate mission and strategy, and informal norms and mores.

Thus, questions that a coach can ask a manager are: (a) Does the manager understand the current context within which he or she is operating? (b) Does he or she know what it takes to be effective in that environment? (These questions are particularly salient for managers who have recently joined a new organization or for the many managers who find that their organizations are changing key ways of doing business); and (c) Are they on board with the new way of doing business or are they still clinging to the old?



### Vision

Under the category of vision, a guiding question is, "What is your vision about what you would like to accomplish in this organization?" The vision can be personal or corporate; the key is to have a set of standards or goals that people are reaching for. As one executive said after 30 years with his organization, "I have only had one goal in my entire career—to take this business that was doing one million in annual sales when I first joined them, to one billion dollars in annual sales—and I have pursued that goal in every ethical way I could."

- It may be a vision like Nordstrom's—to develop the best customer service in the industry, or Wal-Mart—to provide goods at the lowest possible prices. The purpose of the vision is to clarify corporate values and focus, for example, best possible service, lowest price, greatest expertise, fastest service, and so forth, thus providing focus and direction for efforts throughout the organization.

### Communication

The other elements of the model flow from the first two—if the manager has a vision for the organization and understands the organizational context, is he or she communicating these things in a clear and timely way? Here there are several things to consider:

- Are they communicating their vision clearly?
- Do employees understand how to operationalize it?
- Are they communicating frequently enough?
- Are they using methods of communication that employees prefer? For example, in some organizations, managers are criticized for communicating too frequently by E-mail and not enough face-to-face. In others, E-mail is preferred.
- Do employees feel they can ask questions and receive answers in a timely way?

### Empowerment

Here are the questions are:

- Does the manager know how to empower others?
- Are his or her employees ready to be empowered – for example, are they sufficiently knowledgeable or skilled so that they can do what is asked if given the authority?
- Are mechanisms in place so that employees can ask questions and receive answers as they are carrying out their responsibilities?
- Do the underlying business structures support an empowered work force or, alternately, are the structures so bureaucratic and cumbersome that it is impossible to react in a nimble and coordinated way?



### Actions

Under the category of actions, David Campbell (1993) says, Leadership is actions (planning, creating, training, etc.) that focus resources (people, time, money, contacts, etc.) to create opportunities (higher profits, better performance, social justice, greater health, etc.). It is not enough to have inspiring visions, an empowered workforce, good communication. We must do something with the vision, the empowered workforce, the communication. (p. 7)

Here, the questions are:

- Do the manager's actions support the mission or vision? Are they the correct actions given what is currently known?
- Are they timely?
- Are they consonant with the message that is being communicated?

### The Self

Importantly, the self is at the center of the leadership model, responsible for initiating and integrating all the above processes and bringing them into a coherent whole. CCL notes that it is important to be grounded, or anchored, as a leader in order to act responsibly regardless of the political winds that are blowing in the organization or society at large.

Here the questions are:

- Is the manager taking care of himself or herself?
- Does he or she recognize the importance of doing so as a way of staying anchored and maintaining his or her well-being?
- Does he or she view his or her own well-being as a contributor to his or her effectiveness?

### Health and Well-being

Deepak Chopra, Stephen Covey, and Robert Quinn have written much in the past several years about the importance of adult health and well-being. At the same time corporations have recognized the high cost of prolonged stress on employees, and many have taken practical steps such as providing on-site gyms, training courses on health-related topics, and actual health facilities. Yet with all the information and resources available, it is widely recognized that many executives work long hours under stressful conditions with little or no attention paid to their own health and well-being. This is another area where coaches can add value to an executive or manager and quite possibly help them improve aspects of their performance in the process. Attention often can be profitably focused on four aspects of health and well-being: the physical, the emotional, the mental, and the spiritual.

Asking a manager to rate him or herself on these aspects of health (scale of 1 = poor to 10 = excellent) often can become the basis for a conversation about these issues. Many

managers intuitively recognize the importance of these aspects of health but may not consciously focus on them or recognize them as potential contributors to their overall effectiveness. A discussion of the manager's ratings may indicate areas where he or she would like to spend additional effort.

Covey (1995) argues that these areas are related, and improvements in one area can lead to improvements in others, for example, a manager who makes improvements in his or her physical health may feel better mentally and emotionally. Following is a list of signs of well-being in the four areas.

#### Signs of Physical Well-being

- Regular exercise
- Healthy diet
- Adequate sleep (generally 7-8 hours per night)
- Good health
- Regular check ups
- A feeling of energy, vitality, alertness
- Avoidance of excessive alcohol, tobacco, food
- Freedom from prolonged stress

#### Signs of Emotional Well-being

- Using emotions to inform one's behaviors (e.g., when feeling angry, recognizing the emotion, checking to see what is causing the anger and possibly using that information to inform subsequent behaviors, choices, or actions).
- Feeling emotions in proportion to events—not becoming overly emotional on the one hand nor unable to feel emotions on the other.
- Ability to feel connected to others
- Ability to form and sustain friendships
- Ability to commit oneself to a course of action and carry out commitment
- Ability to make and keep promises
- Ability to avoid pettiness
- Ability to help others, for example, mentor, coach, teach, advise, and so forth.
- Ability to care about others
- Emotional insight into what makes one happy, sad, angry
- Lack of preoccupation with worry, anxiety
- Ability to be generous in thought or deed



Signs of Mental Well-being

- Feeling mentally stimulated by the work or mission
- Being able to concentrate, screen out distractions
- Ability to sustain work efforts over a requisite period of time
- Ability to resolve problems without excessive worry
- Ability to take an organized approach
- A desire to learn
- Ability to focus on big picture without getting bogged down in unnecessary detail

Signs of Spiritual Well-being

- Ability to laugh at oneself
- Taking time to reflect on one's direction and purpose as a way of gaining perspective
- A sense of gratefulness
- Appreciation for what one has versus worrying over what one doesn't have
- Appreciation for a force or power that is greater than oneself and that provides meaning to what one does
- Ability to trust other people and processes
- A sense of integrity, truthfulness
- Freedom from cynicism

In coaching a manager about issues of well-being, Wingard (1998) cautions coaches not to collude with the "client's perfectionism by striving for 'balance' as a static state rather than ability to thrive in the midst of disequilibrium" (p. 258). A more helpful strategy may be simply to bring these aspects of health into focus and let clients know that you are able to provide help and support on these issues as well as those more directly related to the business.

Productivity Over the Long Term

Covey (1995) says that time management programs of the past have helped managers list, plan, prioritize, and perform tasks more efficiently, and that these programs have made a significant positive difference in people's lives. But, he says, for most people, while they have perhaps become more effective and efficient, there remains a gap between what's deeply important to them and how they actually spend their time. In an effort to close this gap, Covey recommends that people list the roles they are currently playing in their lives or wish to play. He states that people should limit their roles to seven (plus or minus two). If they are playing more than that, Covey says they run the risk of merely touching all the bases in life but not having significant impact in any area.

Coaches can use Covey's suggestions to ask managers to list the roles they are currently playing or wish to play. Covey also suggests that each person designate one role as that of self-developer. He states that it is difficult to continually work or give to others without taking time on a regular basis to replenish oneself. Replenishment for Covey may come from devoting time to one of the areas discussed previously—the physical, the emotional (Covey calls social), the mental, or the spiritual.

Covey then encourages people to do weekly, not daily, planning and to plan their schedules with their roles in mind. He acknowledges that in this fast paced world in which we live—what Peter Vail has referred to as permanent white water—we will not necessarily accomplish everything we set out to. Because of this, Covey encourages people to ask themselves—What is the most important thing I should do this week in my role as manager? What is the most important thing I should do this week in my role as self-developer?—and to continue to ask these questions with each of the roles listed. This way, he says, while we may not accomplish everything, we will be accomplishing those things which are most important. He believes that time spent doing the most important things in one's respective roles, week in and week out, will lead to significant accomplishments by year's end.

Covey goes on to say that people often let urgent matters crowd out the important—the urgent being the ringing phone, the knock at the door, the accumulating e-mail, those things that demand attention but may not be important or meaningful in terms of what we have set out to accomplish. He urges people to spend more time planning and contemplating the actions we should take, those that are the most important and meaningful, rather than just reacting to the stimuli in front of us.

### Conclusion

Leadership, well-being, and productivity are intricately linked. The three models above demonstrate the linkages and, when used together, become part of a powerful toolbox for coaches working with busy managers and executives. The models are intended to help executives lead, rather than merely manage, and to do so in ways that produce greater personal impact and satisfaction.



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