

# Enrolling Executives In The Coaching Process

Larry Kahn, Ed.D.  
President, LH KAHN

## Summary

Enrolling Executives in the Coaching Process is a practitioner's brief presentation that, based on two sets of experiences, focuses on the multiple methods for assisting interested executives to enroll in the coaching process. The first derives from the author's experience with working with individual executives in Fortune 500 companies, and the second is based on the author's experience in introducing the coaching process to executives enrolled in Wharton's Executive Education Programs. The presentation concludes with a listing of six issues and means of addressing those issues in order to both enroll executives and gain their commitment to the coaching process.

## Introduction

Most organizations have talented, skilled, and experienced executives whose level of productivity or career advancement can be enhanced by appropriate development activities. For many organizations, managers provide considerable challenge in preparation for managing tomorrow's organization from positions higher than these managers currently hold. Challenges often encountered include the following: the fast track manager, who has been moved rapidly through the system without enough time in position to learn the lessons of experience; the U.S.-based manager, who has insufficient international experience to gain a global perspective; and the talented technician, who has been promoted based on individual contribution and has yet to master the skills of managing complex organizations.

Involving these executives in a process of Executive Coaching can be challenging. In order to *enroll* these executives, several approaches have proven successful depending on whether the coaching is presented as an activity for one executive only or as part of a larger group development program. Based on two sets of experiences, this presentation focuses on the multiple methods for assisting interested executives to enroll in the coaching process. The first derives from the author's experience with working with individual executives in Fortune 500 companies and the second is based on the author's experience in introducing the coaching process to executives enrolled in Wharton's Executive Education Programs.

## Enrolling an Individual Executive During an Initial Meeting

In my consultant practice, I use a process called Coaching for Executive Success. The program involves six-phases:

- Phase I        Initial meeting
- Phase II       Data gathering
- Phase III      Issue identification
- Phase IV      Coaching
- Phase V       Planning and implementation
- Phase VI      Post coaching discussion

In Phase I, it is important that the Coaching for Executive Process be understood and actively supported among the people involved. An initial meeting is conducted with an LH KAHN coach, organization line and human resources managers, and the executive. Through experience, the author has found that two methods are useful in enrolling the executive into the coaching process. The first method is akin to a reality check. It is important that the executive know why he or she has been invited to be coached. Here the input of line and human resource managers is critical. In a pre-meeting, they are prepared to tell the executive the real reasons for their involvement in the coaching process. If the executive is in need of broadening or improving a set of behavioral responses or international/global experiences, the representative of the organization (most often the supervisor) is obliged to inform the executive.

The second method is based on nearly thirty years of providing advice to executives. As with any development activity, the executive is more willing to engage the process when he or she knows of a personal benefit. Through experience, the author has identified five themes that seem to emerge from executives involved in coaching. They are:

- Life or work balance
- Cross-cultural communication
- Professional growth
- Diversity
- Leadership or management issues such as strategy, influencing upwards or rewards

These themes are used to acknowledge to the executive at the start that he or she is encouraged to engage the process by focusing on issues that are important to him or her, personally, as well as to the organization. By discussing that there is a breadth of several legitimate issues to be addressed, the executive often finds a hook that will insure that the process of coaching is meaningful (and potentially less threatening) to him or her.

The initial meeting most often ends with a description of the coaching process and a focus on the six phases listed in the previous paragraph. The executives seem to lower whatever resistance that might be present when they learn that there is a structure that contains some flexibility for them to tailor the process in a way that makes sense to them.

Additionally, the executive is made aware of what happens at the end of the process. Following Phase V (implementation of the development plan), a Post Coaching Discussion is held with the coach, organization line and human resource managers, and the executive. An important part of this discussion is ensuring that ownership of the process lies with the

executive with support from his or her operational manager and the human resource manager. When there is a high degree of commitment to the process, the results tend not to fade away over time. Often, the executive views this discussion as support for continued development and is willing to enroll in the coaching process.

#### Enrolling a Group of Executives

Often, as a consultant, this author is invited to be involved in a structured executive development program. When coaching is part of the design, the executives are prepared as far in advance of the coaching session(s) as the design allows. This session is designed both to enroll the executives and to reduce the level of discomfort or resistance then present. For this example, a description is offered of what is commonly presented to the executives who attend any one of a number of executive development programs sponsored by the Wharton School of the University of Pennsylvania.

Data are gathered on behalf of the executive through two avenues. The first is a 360-degree process and the second is a health questionnaire designed to study the relationships between stress on the job and various health issues. The 360-degree feedback is collected by way of either a published questionnaire or a list of questions contained in a letter that is returned via fax to the coaching staff at Wharton.

A sample of the open-ended questions contained in the letter follows:

- What do you find to be enlivening and creative about your current life?
- In what ways have you recently acted courageously and compassionately?
- In what ways have you recently used your power and authority for the benefit of others?
- What constructive steps are you taking to lead a balanced life?
- Give a recent example of a time you performed beyond the call of duty at work?
- What do you do well?
- Are there any other perceptions you want to bring to your coach's attention?

At a glance, the reader might note that the sample of questions in the preceding paragraph is different from the items contained in many standardized, published 360-degree questionnaires. The answers, also, are different and the level of commitment seems to be greater among the executives who receive feedback from these questions.

The executives are invited to attend a preparation meeting prior to their coaching sessions. During this meeting, we explain the purpose of coaching:

- Time to step back and reflect on career and personal life.
- Chance to receive honest feedback from boss, peers, and direct reports.
- Chance to work with an impartial coach.
- Opportunity to learn more about how you are perceived as a leader.
- Opportunity to learn more about blind spots.

- Chance to examine recurring patterns.
- Time to get ideas about how to build on your leadership strengths.

This explanation is followed by connecting coaching with leadership, a self-perception exercise, an explanation of the 360° data (what it represents and does not represent), and ways to maximize the coaching session.

It is suggested to the executives that they spend some quiet time in reflection as preparation for the coaching session. Suggestions include answering the questions contained in the faxed letters as a self-assessment and considering the following questions:

- What are two major themes in your work life at present?
- What are two major themes in your personal life at present?
- What are two leadership issues on which you are currently working?
- What are two issues that are likely to make you defensive?
- What is a project or area of your life about which you are currently excited?
- What is a life dream that you want to fulfill?
- What are some of the ways you tend to cope with problems or conflict?
- Is there an organizational issue on which you would like a fresh perspective?
- Is there a work-life balance issue you wish to discuss?

Also, when a coach is working with a group of executives as opposed to one executive in the coaching process, the initial meeting is critical to enrolling these executives.

### Conclusion

Seven issues seem to be evident in enrolling executives and gaining their commitment to the coaching process. The means of addressing these issues are summarized in the following section:

1. Executives see coaching for themselves, personally, as new and sometimes uncomfortable. They will tend to challenge the process. Return their serve by challenging them to rise to the occasion.
2. When coaching an individual executive, use the organization's line manager and human resource manager to share with the executive the actual reasons that an executive coach has been invited to work with him or her.
3. In order to enroll and commit, executives need to see the benefits from engaging the process. Be sure to engage the executive in a discussion that focuses on "what's in it for them."
4. Be aware of concern, discomfort, lack of commitment, or resistance and speak to it directly.

5. Assist the executive to take ownership of the process.
6. Whenever possible, gather data in addition to those contained in published 360-degree feedback questionnaires.
7. After the initial, explanatory meeting, assist the executive in preparing for all subsequent meetings.