

A Roadmap for Implementing a Coaching Approach In Organizations

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Abstract

Abstract: *The purpose of the study is to identify an evidence-based road map for implementing a coaching approach as a framework for operating and driving change in a service organization. An integrative approach to the literature review was used to explore the benefits of developing a coaching culture and organizational support needed to facilitate and sustain the desired change. The study concludes with an approach for implementing “coaching conversations” based on leading coaching success factors, the integration of emotional intelligence and the emerging understanding of neuro-science, specifically impact that positivity has on sustaining a healthy work environment.*

Keywords: Implementing a Coaching Culture, Coaching Conversations, Organizational Change, Emotional Intelligence, Leadership Development

Introduction

The overall purpose of this study is to identify an evidence-based framework for creating a coaching approach permeating all aspects of operating within organizations. The organization at the center of this study is a large multi-billion-dollar non-profit healthcare organization that is impacted by the continuous changes in the Health Care Industry. The current CEO wants to be intentional about creating a culture of leaders throughout the organization: Leaders who have the capacity to continue to grow a nimble and flexible organization that is able to respond efficiently to the changing demands of the industry; Leaders who would remain accountable to a “member-centric” mission as a core value; Leaders who are intentional about fostering an environment where all employees collaboratively and collectively contribute to advancing the ultimate experience for those they serve; And, leaders who would own and drive a healthy culture of respect and compassion for its most important asset, the employees of the organization. The researcher is also a member of the C-Suite in this organization, has been asked to work with and lead the leadership team in this initiative. Her previous research which culminated in a dissertation entitled *How Leaders Learn Through Massive Organizational Change* (2009) and current participation in the Columbia Coaching Certification Program provides great insights and informs the direction that will be taken in this case study and in the effort to support this part of the organizations journey. A search of dissertations and articles from the Columbia on-line library resource, on-line Google searches, and a review of other magazines such as Harvard Business review and Forbes Magazine were used to inform the approach recommended for implementing a coaching culture. As a result of the literature review, the researcher will offer a plan that positions the organization to develop the skills needed in their leadership and to permeate those skills throughout the organization leading to the realization of organizational excellence and overall service levels desired.

Review of Selected Literature

To guide the inquiry for identifying an evidence-based approach to implementing a “*Coaching Approach*”, the researcher draws on the coaching model presented in the Columbia Coaching Certification Program. This model is based on an expanded version of action research in the fields of organizational development and adult learning (Burke, 2002) and is grounded in the Science of Human Performance which considers human performance in a holistic state - the context, content, and conduct of the matter. (Maltbia, Marsick, & Ghosh, 2014) This framework is selected to support and guide the inquire, uniquely positioning the

organization as the client in this review. And, it provides a way to explore both what is happening at the organizational level as well as the interplay at the individual level. The paper is structured in alignment with this framework as seen in Table 1.

Table 1. Framework to Guide the Research

Phase I – Context What’s Up	Phase II – Content What Matters	Phase III - Conduct What’s Next
This phase focuses on examining the current state of the organization and how it operates. Challenges and concern; Hopes for the future; Capacity and motivation to grow. Here goals are clarified, aspirations identified and the motivations for making change articulated. It explores the underlying values and how it relates to current and desired state.	This phase considers the change and growth desired, as well as, what it takes to achieve the future state. Examines the various options that the organization can take and determines what can be supported realistically, what’s the best bang – in terms of costs and benefits - and determines what options best align with the current or desired organizational values.	This phase determines action to be taken, along with considering challenges, strategies and support for moving forward. Creates opportunities for on-going learning through real time reflection that allows for changes needed to support organization and individual change.

Phase I: Organizational State (Context)

This is an organization that has spent a decade being deliberate about creating effective structures and processes, enhancing communications with its’ members, and implementing technology that streamline the work for greater efficiency, all with a focus on providing the best service to its members. Yet there is still a deeper level of service to attain. Recently, the CEO became a ‘member’ to experience the systems and processes from the member’s perspective. She found that even more could be done to enhance easy access and quality service to the members. While recognizing the great work the team has done to meet the members’ needs, she recognized that the lens used to do so was with a perspective from within the organization looking out, not from a perspective of the member receiving the services looking in. The CEO challenged her leadership to consider, if they were to sit in the seat of the members, and experience the service from the organization as a client, in what ways would they now have to turn the organization upside down and alter systems to provide service from the member’s perspective.

There are several factors that make this a compelling time for the organization to embark on what will be a transformative undertaking, moving them to a whole new way of thinking about their work and a new level of operating. A primary driver is the vision for a member-centric way of operating that would permeate the entire organization. This parallels the “patient-centered” approach in the Health Care industry that is meant to support the well-being of patients in every aspect of medical care; This organization is likewise adopting a “member-centric” approach to supporting their members. The CEO recognized that in order to achieve and sustain the level of service that she envisioned would take yet another major shift in the lens and culture of an organization that is already committed to provide the best services possible. She was also sensitive to the many things going on in the organization and was interested in an approach that

would facilitate this major change effort, in a way that supports the individuals in the organization. Table 2 identifies some of the internal and external forces that come together to drive this level of change.

Table 2. Organizational Triggers

TRIGGERS	DESCRIPTIONS
Member Centric Focus	Every conversation, in every department begins and ends with how will this be experienced by the customer - Internal and external customers alike?
Continuous Change In The Health-Care Industry	Continuous learning occurs through inquiry and critical thinking to create an organization that is able to meet the on-going challenges of the health care industry.
Long Term Employees	Harness and unleash the knowledge and true potential of each employee.
Healthy Employee Supported Environment	Environment where individuals contribute in meaningful ways to the goals of the organization and feel valued in so doing.
Physical Move In Location	In one year, this organization will move to a new location with a very different work design. The new physical design is an open plan design that will facilitate increased collaboration and requires a different management style and approach to support employee engagement in problem solving, planning, and implementation.
Succession Planning	A continuous chain of leaders who develop leaders committed to challenging every protocol and procedure, system and practice for member centric application.
Organizational Environment	Values and operating principles that supports a respectful environment where employees work together, without barriers, sharing ideas and implementing initiatives that best service the members. And, where the needs of employees are met in support of providing the best service possible.

The table describes current data points in the life of the organization that serve as triggers which come together driving the need for change. It also describes the hopes and dreams that the leadership has for the future of the organization.

In her on-going discussions with the team, the CEO stress the need to be intentional about creating sustained change. She also shared her expectation that the road to achieving such fundamental change would require the ability 1) to listen to the members with a deeper sense of understanding their experience (not just hearing what they say), 2) to question how they approach identifying and understanding member issues, 3) to question the way they think about solutions, 4) to ensure that strategies are executed with a mindset different to what they have used in the past, and 5) to shift the very nature and culture of the organization in fully integrating all aspects of the operation. Organization culture refers to the entire organization and the combination of its values, people, traditions, strategic goals, and the formal and informal processes and systems in place that guide managers and employees in everyday work life. (David Lindbom, 2007) Recognizing that there will need to be an evolution in the perspective of each individual's approach to the work and an evolution in the culture to support the desired change in operating, she was ready to prepare the leadership team to embark on this transformative journey.

To determine the best approach to support the organization on this very transformative leg of its journey, and with the help of a coach-consultant, the leadership team stopped to consider the core of their business. At the core of everything they do is the conversation with the member. All systems, protocols, processes, knowledge and capabilities, competencies, strategies, ways of thinking and approach to the way they work, collectively supports the experience of the conversation. With conversations and communication at the pinnacle of the work, they began to ask questions, such as:

- *What would it mean to have the kind of conversations within the organization that were expected to occur with members?*
- *What would it mean to have respectful, accountable conversations, where listening took place at a level deeper than hearing, and responses happened with a sense of curiosity in understanding the issues and seeking to address them from the “others” point of view?*
- *What would it mean to change the nature of conversations to allow all staff to feel free enough to make meaningful contributions to the way work was accomplished?*
- *How do you create a culture where healthy, insightful, action-oriented conversations are the norm, and where conversations and all forms of communication demonstrate the care and commitment to the best experience for employees and members alike?*
- *What would the impact be if the way we expect to communicate with members became the norm for how communication took place within the organization?*

Phase II: Exploring Options (Content)

Phase II begins the journey of exploring viable models for implementing change. In the section the researcher focuses on the organizational and coaching conversations, coaching competencies and benefits within an organization, coaching approaches and preparing leadership and the organization for change.

Organizational Conversations

With the communication and, in particular, the “conversation” at the core of what the organization does, the research begins with scanning the literature for insights into conversations in organizations. Patricia Shaw (2002) offers a perspective that allows us to think about conversations not as a back drop to the work that is going on – but proposing that the conversation *is* the work, in and of itself shaping the future. She suggests that we often take conversations for granted in organizations, thinking of them as a delivery mechanism for products take place (such as, reports, updates, etc.) and not as a vehicle of engagement. Shaw offers that we change the way we think of the role conversations play in organizational life, recognizing that perhaps it is less the systems and processes but the conversation itself that is the key process through which forms of organizing are dynamically sustained.

Clyde Bruzas goes on to reminds us of the power of conversations and how they differ from discussions.

“A conversation is different to a discussion, and while both are important they have very different qualities...Discussions are frequently used in planning and decision making; different points of view are weighed up, arguments for and against a particular course of action may be considered, and there may well be an element of judgement involved. The purpose is often to come to some sort of conclusion. The purpose of a conversation, however, is exploration and deeper understanding of a topic or situation. There is no judgement, and no intention of coming up with the “right” answer because in a conversation there is no “right” answer. There is also no flipchart

waiting to be written up with “next steps” although new insights may give rise to fresh ways of doing things.

When participating in a conversation, two skills become especially important. The first is listening in a different way, with openness and a willingness to really hear what the other person is saying without criticism or judgement. It is not about waiting impatiently for one’s own turn to speak, or to listen with the purpose of responding with an argument. The other skill is the ability to speak with integrity – as honestly as one can from out of one’s own experience and view of the world. It is about sharing our views and understandings with our listeners, not convincing them of our viewpoint, but rather adding to the richness of the growing and deepening story which emerges from hearing all the participants. During this process, questions can be especially helpful, and asking the right question at the right time is another valuable skill to cultivate.”¹

We find others recognizing that the conversation is at the core of communications. In the article, *The Role of Conversation in Producing Intentional Change in Organizations*, Ford & Ford (1995) consider a model for communicating based on types of conversations that managers can use to create, sustain, focus, and complete change. Also, cited and tried are the concepts in the article [Leadership is a Conversation](#) which suggests intimacy, interactivity, inclusion and intentionality are key to effective communication, and, how those conversations happen is key to success in change. The model offers that while communication must be bilateral and engaging, it is “true listening...that signals respect for people of all ranks and roles, a sense of curiosity, and even a degree of humility.” (Groysberg, B. & Slind, 2012)

Coaching Conversations

We first take a look at executive coaching as a model for preparing leaders to take on this challenge of transforming the organization. In an article by Maltbia, Marsick, and Ghosh (2014), they reviewed the history of the term coaching and describe its’ origin as coming from the term “coach” as in a vehicle that supports individuals in getting from where they are to where they want to be. They cite a more general definition of coaching:

“Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential – coaches honor the client as the expert in his or her life and work and believe every client is creative, resourceful, and whole” (www.coachfederation.org/, p.163)

The article cites Maltbia and Power (2005) as having identified five themes related to the executive coaching process. These themes are identified in Table 3 along with three additional themes which were identified and reported through the continued literature review. (Maltbia, Marsick, & Gosh, 2014).

¹ Clyde Bruzas, *The Value of Conversations in Organizations*, well-grounded.org

Table 3. The Executive Coaching Process Described

Description of Coaching Process
<ul style="list-style-type: none"> ▪ A process (focused on learning, choice, change, and growth), ▪ A partnership (a designed alliance between the coach and the executive), ▪ A balance between individual and organizational needs, ▪ A way of working, and a new face of leadership for the 21st century. ▪ A new face of leadership ▪ An intervention (i.e., intentional and planned set of tools, activities and interactions ▪ A goal- focused form of customized leadership development, performance improvement, and skill enhancement support (e.g., <u>Hall, Otazo, & Hollenbeck, 1999</u>); ▪ A vehicle for systematic feedback for increased executive awareness and effectiveness

Maltbia, Marsick, & Ghosh (2014)

Coaching Competencies

Through integrated literature reviews, a theoretical and research basis for identifying core coaching competencies was conducted (Maltbia, et. al, 2014). Drawing from the 11 core competencies identified by the International Coaching Federation (the largest coach affiliated and credentialing organization), six core competencies were identified. The first four competencies are considered “success factors” in the Columbia Coaching Certification Program: Questioning, Listening, Relating (Social Awareness) and Presence (Self Awareness). This cluster of four competencies align with competencies that are considered conversational, relational, and facilitative. These also reflect the nature of the conversations at the center of the work performed within this organization as it relates to communication with its’ members.

Figure 1. Coaching Competencies

Listening	Questioning	Social Intelligence (Social Awareness)	Emotional Intelligence (Self Awareness)	Framing and Reframing	Contributing
<ul style="list-style-type: none"> • Focus on what clients say (and do not say) to understand the meaning in the context of the client’s desired results, 	<ul style="list-style-type: none"> • Inquiry to reveal the information needed for maximum benefit to the coaching realitonship, capturing the learning embedded in experience 	<ul style="list-style-type: none"> • Establish Trust, • Encouraging Engagement, • Building Relationships 	<ul style="list-style-type: none"> • Accessing one's emotional presence through awareness of one's own thinking and managagine the emotions of self and others. 	<ul style="list-style-type: none"> • Supporting clients in expanding their world view 	<ul style="list-style-type: none"> • Communicate effectively to challenge and support as needed to facilitate learning, growth, and renewal

Maltbia, et al, 2014

Benefits of a Coaching Culture

Our exploration continues with a look at how the benefits of a coaching culture is reflected within an organization. Table 4. reflects reports of the common changes that clients experienced after implementing coaching or a coaching culture.

Table 4. Benefits of a Coaching Organization

Ed Parsloe, (2016)	DeVaux, Victoria (2010)
<ul style="list-style-type: none"> • Managers looking for opportunities to help others to learn • People asking each other open questions • Employees at all levels having open, honest and supportive conversations with one another • People routinely giving one another feedback - supportive and critical • Managers coaching team members to help them develop, rather than just to tackle poor performance • Coaching and mentoring relationships forming spontaneously • Senior leaders with a clear vision that coaching and mentoring are at the heart of how we operate • Teams working with clear goals, roles, processes and relationships 	<ul style="list-style-type: none"> • Improved ability to relinquish control and delegate responsibility • Strengthened ability to make a career decision • Improved work-life balance • Improved overall outlook • Enhanced ability to focus • Strengthened sense of being more "in-tune" with their work or office environment • Improved listening skills • Enhanced ability to apply past learning to assist them in new situations • Improved ability to evaluate and take calculated risks as opposed to "snap decisions" • Reduced stress • Improved planning skills (corporate strategy)

It was clear that this idea of a coach to support the leadership and coaching model to support the organizational changes desired struck a favorable chord within the leadership team. The coaching process, coach competencies, and benefits of a coaching culture appears to have all the components to achieve the dreams that the leadership team has for the organization. But was it scalable? There is some evidence that getting Executive leaders to participate in coaching is effective for job performance of those reporting to them, it is less certain that the effects of coaching are seen consistently in middle managers. (Yu, p.6). However, for the initiative to have systemic impact on the organization, cascading the skills that drive a coaching culture would be key. The search continued to look for examples of implementing a coaching approach as a way of supporting employees to better manage the changing environment around them.

Manager As Coach

The role of Manager as Coach was described by Richard Ladyshevsky as not a traditional role of a coach, but as a manager who uses a coaching approach to support the professional and personal development of each individual. The manager using this approach "...builds a relationship around trust and believes in the capabilities of the individuals who form part of his/her team." (2010) Ladyshevsky further reports that the skills that are "...commonly described as being fundamental to success in coaching [include] an ability to develop a partnership; a focus on goals; compassion and acceptance; communication skills that drive action; responsiveness; respecting the individuality of the client; practice and preparation; openness to being coached in return..."

This approach provides an example of how redefining the managers approach to leading can have the effect of implementing core elements and scaling a coaching model to gain the benefits of a coaching-like environment. In the continued search for implementing a coaching culture that is not only scaled throughout the organization but also sustainable, we focused on the broader category of how to support the organization and the employees in learning to think and operate differently in their work environment. Table 5 illustrates the learning theories and approaches to organizational learning discussed within the leadership.

Approaches to Implementing Organizational Change

Table # 5. Organizational Structures Supporting Systemic and Lasting Change

<p>Action Learning (uncover assumptions, transformation)</p>	<p>“The action learning process [perceived by Revans] asks individuals to identify a problem that has no apparent solution and, through a process of questioning without judgment, explore the possible solutions. Critical to the action learning process is that it uncovers those assumptions that may be impinging upon effective action and reflection. Action Learning requires both reflection and action; the process is one of reflection and probing of assumptions through questions and reframing of the problem. However, it also requires that action be taken, and new behaviors tried; this, in turn, gives material for further probing alternative and possibilities, continuing the cycle of learning through exploration, reflection, and action, a process similar to that defined by Mexirow (1991) as transformative learning.” (Rey, 2010, p.59)</p>
<p>Informal learning theory (Practice, transformation)</p>	<p>Rey (2010) reviews the Informal Learning Theory literature and quotes Marsick and Watkins as suggesting that “informal and incidental learning begins with a belief that learning grows out of everyday encounters while working and living in a given context’ (Merriam, 1999, p.29)...and it happens as individuals make sense of [the] situation and progressively make meaning of the experience....individuals diagnose the problem....against previous experiences and assess the similarities and gaps to interpret and make sense of it.” (p. 29?)</p>
<p>Single, Double, and Triple loop learning (critical thinking, questioning, underlying)</p>	<p>“Single loop learning suggests a routine in response to fix a specific problem or conflict. Double loop learning, however, begins to question and challenge responses and seeks alternatives to addressing the problem or conflict. Triple loop learning describes a stage of questioning the underlying assumptions associated with a problem; this approach goes beyond seeking an alternative solution but understanding why the problem or situation exists to begin with. An examination of root cause can lead to different assumptions about the existing situation and ultimately a shift in values or theories of action as they relate to the problem or conflict...This level of examination requires the ability to assess across value systems and cultures to permit new frameworks and meta mental schemes to evolve.” (Rey p.)</p>
<p>Reflective Learning</p>	<p>Shon (1983) offers a phenomenon of reflection-in-action, which suggests that all activity and underlying assumptions are being analyzed in real time. (p. 60).</p>
<p>Collaborative Inquiry (fosters critical thinking)</p>	<p>“Collaborative Inquiry (CI) is defined by Bray, Lee, Smith, and Yorks (2000) as “a process consisting of repeated episodes of reflection and action through which a group of peers strives to answer a question of importance [to] them (p.6). CI embodies Revan’s model of learning that promotes “wrestling with complex problems, confronting people, taking action on these problems, and reflecting on the results” (p.43)</p>

In her review of the relationship between coaching and learning, Hurlow (2018) notes that it is important to stress ...[the need to] appreciate that each approach [to learning] sheds a different light on aspects of learning. (p.8)

How the learning takes place is a function of the structures that are in place to support the learning. In a study about how leaders learn during massive organizational change, Rey (2009) concluded that small group networks served to support the collaborative inquiry style of learn during transition. Mentor relationships, and professional development, were also identified as structural support for learning. (p, 227) Senge (1990) offered the learning organization model which “highlights the integration of individual mastery and shared vision as important elements for team learning.” The literature identifies mentors (Daloz, 1999), communities of practice (Wenger, 1998), and networks and informal relationships (Marsick and Watkins, 2001) as examples of social learning structures that facilitate the learning experience. Rey also reviewed models of change theory and focused on Bridges (2000) for individuals, Burke &

Litwin,1992) for organizations, and on learning theory drawing from Senge (1990) and Argyris and Schon (1996) to exam the nexus between individual learning and the organization. (p. 62)

Small groups, teams, and informal relationships are structures already in place within the organization and can provide focus for the practice of the coaching approach to be integrated throughout the organization, ensuring the healthy operations of these structures supports the ability to influence culture at every level of the organization and increases the possibility of long-term sustained change.

Preparing Leaders for Change: Resonant Leaders are Transformative

In 2002, Daniel Goleman, Richard Boyatzis and Annie McKee introduced us to “resonant leaders” and describes them as transformational leaders. In their book *Primal Leadership*, Boyatzis, et al, provides a leadership development approach based on a framework grounded in Emotional Intelligence and Intentional Change Theory – key elements for developing resonant leaders. Resonant Leaders are able to build relationships of shared vision and caring. They do so with a high degree of self-awareness and awareness of their impact and influence on others. Emotional Intelligence also emerged, in a study of leaders who mastered change, as a critical factor for successful in leaders’ performance during major organizational change. Results of the study conclude that “...to be an effective leader, manager, or professional, a person needs to understand and skillfully manage [their] emotions appropriately based on each person or situation and understand the emotional cues of others in order to interact with [them]... “(D. Rey, 2009)

Figure 2. Emotional Intelligence Success Elements During Change

Learning-through-Emotions			
Relationship Management: Collaboration	Self Management: Face Challenges	Social Awareness: Aware of Impact on Others	Self Awareness: Know Limits

Adopted from D. Rey (2009)

Preparing the Organization for Change: Intentional Change Theory

In exploring the literature for those elements that serve to motivate sustained change, the researcher came across Boyatzis and Jack’s (2017) introduction of their Intentional Change Theory (ICT), which makes a connection to findings associated with the neuroscience of creating a coaching culture in organizations. ICT suggests that when a person is supported in their quest to identify the strengths and gaps between who they are and their personal vision of who they want to be, and they have an opportunity to practice the skills and ability to achieve their own goals their drive for sustained and desired change is activated. (Boyatzis, 2012)

“In addition to creating a motivation and purpose for activities, coaching to a personal vision is claimed to arouse the positive emotional attractor.” (p. 1) The positive emotional attractor (PEA) activates the parts of the brain that is associated with “big-picture thinking, engagement, motivation, [and] stress regulation [and opens the channels] to detect and perceive new ideas and scan the environment for possibilities...”(Raichle, 2010)

This allows more openness to new ideas and creates a sense of safety for individuals to face, rather than avoid difficult issues...and creates a tipping point that leads a person to progress through the stages of intentional change.

The following table summarizes the stages of ICT. It is the progression through these stages that promote sustained, desired change:

- Activation of ideal self (compassion, purpose, and core values),
- Realization of Real Self (awareness of how one is actually coming across to others,
- Development of a learning agenda (framing of learning goals and action that one enthusiastically looks forward to trying),
- Experimentation and Practice of new behaviors and feeling (that move a per closer to their vision), and
- Focus on fostering and maintaining trusted relationships (to support the continued learning journey).

One critical message gleaned from this theory is that in order for change to “stick” or be sustained, there must be intentionality in attending to the agenda of the individual, alignment between the individual and the organizational goals, and the support available for learning and change to occur. All levels of the system or organization must be engaged in the process of intentional change. Intentional Change theory along with Emotional Intelligence provide a foundation for developing resonant leaders who are better equipped to transform an organization. (Boyatzis, 2017)

Preparing the Organization for Change: Culture of Positivity

Fredrickson, too, studied the role of positive emotions in flourishing individuals and reports that there is empirical evidence that positive emotions are a key active ingredient in flourishing; And, those who flourish experience bigger boosts in positivity. (Fredrickson 2013) In other words, there is reason to believe there is positive correlations between boosts of positive emotions to routine daily events and flourishing, which in turn expands an individuals’ growth in resources which predict higher levels of flourishing. Wright further explains how Intellectual, Social, Psychological, and Physical Resources expand through the Broaden and Build Theory identified through a study that concluded positive emotions 1) Broaden our thought action repertoires; and 2) Build our enduring personal resources. Those resources are described as follows:

- *Intellectual Resources* - enhancing learning, problem solving, creativity, accuracy of judgment, decision-making and performance on complex tasks, increasing possibilities for effective action, and expanding our view of the world, our relationships and interactions.
- *Social Resources* - enhancing interpersonal effectiveness, interconnectedness and co- ordination, solidifying and helping us make new bonds, increasing social connections and social support.
- *Psychological Resources* - building resilience, optimism, goal striving and enhancing coping strategies.
- *Physical Resources* - developing coordination, increasing strength, improving cardio vascular health, sleep quality, immunity from illness and disease.

Wright also offers that “Positive emotions facilitate the stimulation of ideas, encourage trust, and support the achievement of shared goals. They broaden the scope of one’s self perception, which blurs the distinction between self and others. When we broaden our thought action repertoires, we literally take in more information, we look at the bigger picture – this not only affords us more opportunities for effective action, but importantly it helps us think in terms of “we” not “I”. This can result in feeling a greater alignment with, and for, our organization and its vision, purpose, goals, and

strategies...[the] positive affect assists the concordance of personal goals and values with the emerging outcomes of a group, while boosting personal meaning and transcendence so that strengths and goals are enacted in the service of something bigger than self thereby supporting whole system engagement. (Seligman and Csikszentmihalyi, 2000, p.5).

Phase 3: Next Steps (Conduct)

The CEO and the leadership team have decided to take the plunge and begin the journey of driving change in this organization one conversation at a time. Changing the culture to support coach-like conversations, offers the promise of creating and facilitating an internal environment and culture where employees are both supported in the work that they do and empowered to be positive contributors to how the work is approached and how it gets done.

Positivity is contagious. And so, as the supportive conversations become the cultural norm, the level of support provided to members will also change. Not by osmosis, but with great intentionality at every level of the organization.

Borrowing from the work of Boyatzis, Smith, and Van Oosten (2013), *Developing Resonant Leaders through Emotional Intelligence, Vision, and Coaching*, a program for the senior leadership would be shaped based on the 3-tenants of their program. The components of this leadership development approach are described in Table 6.

Table #6. Components of A Leadership Development Program

Part I:	Personal development and growth through exercises, where participants reflect on their core values, their passions, their life purpose and their leadership legacy, and develop a personal vision statement; Introduction to Emotional Intelligence - understand the ability to manage their own emotions and recognize the impact they have on others.
Part II:	Participants shift from individual development to focus on development of others through effective coaching conversations and the Intentional Change Theory process.
Part III:	Focus is on building a culture of engagement and compassion. Specific skills are further developed such as empathy adaptability and mindfulness

At the time of this writing, the leadership has agreed to launch the Executive Leaders Team Development program in the next few weeks. This program will host a combination of quarterly group activity, small group work, and individual coaching at this level. The goal in the first year is to build a new level of team synergy, develop a new and transformed mindset in approach to the work, to empower all employees, and, to sharpen skills in the four success factors – Questioning, Listening, Relating, Presence, as well as in the area of Emotional Intelligence. This will be supported by individual coaching for each leader. The coaching will emulate the tenants of the positive activator and support leaders in challenging their own mental models around the way they work, in preparation for driving and supporting transformative changes in mindset and approach. The training will include the use of assessments (such as an emotional intelligence tool, identifying strengths, and DiSC leadership and communication styles) to

support their learning and equip them to collectively support and facilitate learning at each level of the organization, to guide their personal exploration and development, and to create strategic opportunities to strengthen the leadership team working together and with their respective teams to cascade new learnings and new ways of approaching the work in real-time. They will serve also as peer coaches and mentor coaches in support of reinforcing coach-like conversations and developing new ways of thinking and operating.

A second level of leadership will engage in a similar process, their program beginning 3 months after the start of the executive leadership program. This gives the ELT an opportunity to try the program on and make changes to the approach as needed for effective implementation and cascading in the organization. This makes deliberate the work of *Reflection-in-Action* to enhance the changes and integrate them in the culture. A program will simultaneously launch for all supervisors and managers, introducing them to the use of the success factors and creating opportunities to practice, use, and operationalize these skills. Much of the work that is done in the organization is through cross-functional groups. The leadership team will be even more deliberate about expanding the number of individuals who have an opportunity to participate in the teams and groups that are created across the organization. They will also encourage and make space for the use of small group work within departments, where healthy conversations are happening and all members have an opportunity to contribute and to be heard. There are several layers of training already planned through the year, such as broader Leadership Development, Customer Service, Internal Building Bridges, Front-line Managers Driving Change and more, all of which will be modified to include building the coaching conversations competencies.

At all levels, particular attention will be given to challenging assumptions about the way work is approached and changing the lens to be able to look both analytically and empathetically at the organization and its' operation from the outside – in, from the perspective and lens of the member, with the intention and ability to make the changes needed to enhance and better support the members' experience.

Positivity as an approach will also be front and center in the work, understanding that positive emotions unleash the possibilities to new and creative ideas as well as trigger the motivation for learning and sustained change. As Carol Wilson reminds us 'to be effective as a coaching manager, your skilled engagement in asking, listening, and clarifying must be grounded in respect, emotional intelligence and building confidence. And, when intentions are set on bridging our realities, being open and transparent, focusing on respect and relationships before tasks, listening to understand, discovering shared success and consistently working to narrow the reality gaps, we are exercising our conversational muscles. When we do that, we are much more likely to achieve organizational goals and perhaps our personal ones as well. (Korn Ferry, February 2014)

As a final note, a review of measures and milestones will also be identified by the leadership team. An organizational assessment tool will be implemented, the surveys of the members will be retooled and monitored, and evidence that we are building a culture where coach-like conversations are at the core of every engagement will be monitored.

The appendix includes the initial draft of the launch of the Executive Leadership Team program. I suspect that as the team takes this journey there will be tweaks along the way. Updates to this case study will be provided as the implementation proceeds.

Summary of Findings

This case study of an organization that is positioned for transformational change. Here, the organization is positioned as the client (as in a coaching-client relationship). And the framework of the coaching process to guide the exploration. The three phases, Context – What's Up? Content – What Matters?, and

Conduct – What’s Next? each have distinctive components that support the journey of the client from a current state to desired state. Following are findings that emerged as a result of the literature review and discussions aimed at finding an approach to transformational change in a Health Care organization.

Finding #1: The organization is the holder, the container, of the culture and the values carried out through the individuals within its employ. The interchange between the organization as holder of culture and values and the behavior of the employees of the organization creates a symbiotic relationship in shaping the approach for sustained transformative change. This relationship supports the positioning of the organization as client in the exploration of the framework for change in the case study and is realized in each of the phases of the study.

Finding #2: The research identifies that intrinsic motivation positively impacts performance within a context that supports integration of values and autonomy for the individual. When values of the two entities are aligned, that is the value of the organization and the individual, then behavior that is autonomous is in alignment with the needs of both the organization and the individual. And, therefore, autonomous behavior does not serve as threat to either, but enhances the performance of both. The greater the conditions that support integration of the two the quicker the nexus can be achieved where possible. We have learned in the research that intrinsic motivation is the drive to be curious, playful, inquisitive, interested, questioning. And so, the organization then must serve as the container in support of these behaviors fostering the development of the motivation of each individual to thrive at their level of development.

Finding #3: Two distinct elements are added to the areas of focus for this leadership team. They are, Emotional Intelligence, and Positivity. While *Presence*, a success factor amongst coaching competencies, is associated with self-awareness, a form of Emotional Intelligence (EI), Emotional Intelligence continues to show up as a critical component to success in effective leadership and in managing change. Because of its prominence in the literature, the leadership team became comfortable with a specific focus on developing EI skills. Thereby, giving Emotional Intelligence a place in the framework that is separate from Presence. In addition, there is growing evidence that specific emotions – positive emotions facilitate the stimulation of ideas, encourage trust, and support the achievement of shared goals (Seligman and Csikszentmihalyi, 2000). There is also positive correlation between positive emotions and the broadening of one’s ability to flourish and build capacity in areas of personal resources, such as, intellectual, social, psychological, and physical resources.

Finding #4: ‘Conversations’ emerged as the vehicle through which change would occur in the organization. While we often see conversation as an event, the literature points to conversation in the organization being the vehicle through which values are expressed, inquiries are made, questions are asked, information is shared, contribution is offered, employees are supported, and members are served. Here the competencies of the coaching conversation are adapted as a means to facilitate the kinds of conversations that embody the values and goals of the organization. Added to those core competencies is the element of positivity that we are learning serves to expand the ability to imagine and think beyond what the norm is, and to create the new as needed to meet the challenges and opportunities of an evolving organization. These elements identified here as PREP are reflected as follows:

- Presence (Way of Listening and asking Questioning)
- Relating (Social Intelligence)
- Emotional (knowing, understanding, and managing oneself)
- Positivity (Ways of supporting a healthy environment to facilitate creativity and support individuals’ ability to flourish)

Finding #5: Workgroups, teams, individual conversations are vibrant and occurring within and across departments. The encounters within these structures can support the opportunity to challenge the current and interpret experience in a way that allows new ways of thinking and operating, as described by Informal learning theory. These structures would be used to support the practice of Presence, Relating, Emotions, and Positivity as enhanced norms that support the values and autonomy of each individual member of a group. Because of the real time nature of addressing organizational issues within many of these groups, the elements of learning through reflecting-on-actions (a form of Action Learning) is not foreign to the leadership of this group. Intentionality, in this process, to review and take action on what is learned is critically important to the organizations ability to recognize when something isn't working and to adaptable to making changes rather quickly.

Finding #6: *Leader as Coach* emerges as an approach that is both accessible to the organization and scalable throughout the organization. Through new and already planned development programs the organization will cascade the learning and expression of those competencies to all levels of leadership and staff. The program begins with the senior leadership as they practice embodiment of the elements in how the operate, lead, and support others. The senior leaders will also have the support of a coach as they are intentional about examining personal passion, vision, and mental models that drive the way they operate and identify where gaps must be realigned with the direction and goals of the organization. Almost all work groups and project teams have some level of leadership within them, who will be equipped to assist the varying groups in fostering a healthy PREP environment. Finally, all training programs will be infused with the language and values of PREP creating a culture that supports and thrives on the alignment of values and levels of autonomy operating throughout the organization. A sampling of the program structure can be found in the appendix.

Implications for Coaching Practice

The goal of the study was to support an organization in identifying an evidence-based approach to transform the organization to a coaching culture. In this study, the researcher uniquely positions the organization as client and uses the framework of the coaching process - context, content, and conduct to explore the approach that would be taken to achieve transformation in the organization. This framework is referred to in the Columbia Coaching Certification Program as 3CP and provides for 3 distinct phases of the coaching process as illustrated in the following Figure.

Figure #3: Columbia Coaching Process

Coaching Process



Here using the organization as client, the 3CP process forces a critical examination of the organization as a living organism and places attention on the elements of the organization that are needed to identify, facilitate, and sustain desired change. In this study, the leadership of the organization was very involved in thinking about the issues, the direction, and the best way to approach change.

A great deal of time was spent with the leadership, particularly in Phase I to understanding and codify those things driving the change: 1) The experience of the CEO, as member, which signaled that the processes implemented, while they supported the member getting the benefits needed, did not do so in a way that provided the best member experience. It was clear that a different lens was needed to retool the operating protocols and the principles that guide them; 2) The importance of creating an environment where individuals contribute in meaningful ways to the goals of the organization and feel valued in so doing; 3) The desire to be intentional about succession planning required being intentional about developing leaders equipped to bring continued innovation to meet the changing needs of the population and industry; and 4) The move to a new location presents opportunities for operating differently.

This is an organization that is used to having to respond to change and to expressed concerns by the members. So, taking the operation to a new level would not be business as usual. This initiative would require the focus, commitment, and a change in mindset of the senior leadership of the

organization. For there to be a deep authentic and lasting change in the organizations' operations, the leadership too, would have to wrestle with alignment of their value and organizational needs at this time. As we know, one of the greatest triggers for change is the alignment of personal vision and passion with the alignment of the organization.

Note 1: This alignment between personal passion or life vision and the values of the organization is an important element to add in the coaching process particularly for those in transition. Informal discussions with coaches and the researchers experience identifies that actually doing the internal work of life's passion and vision is a struggle for many individuals. Yet their experience reveal how empowering it is for those who complete that journey and allow themselves to follow the path that emerges for them. I, as researcher, coach, and leader have experienced and seen the struggle that other leaders have with this exercise and surmise it is because of the responsibility of choice that it demands once the revelation of one's true passion is realized. What happens when the inner passion does not match the values of the organization or ones' dominant style or way of being? What happens when being faced with the apparent right action is walking away and that is not an immediate viable option. Here I would encourage coaches to encourage clients to press for this revelation. Doing so will provide information regarding the gaps between the values underlying their passion and the values of the organization – and that in and of itself is powerful. What I have seen is the frustration of not understanding the gaps that exist, reframed and replaced with choices about developing and engaging other styles, examining strengths that can be more intentionally utilized to achieve everyday goals or to better manage difficult situations.

Further assessment identified that the organization had already begun to revamp their competency model. Challenging old assumptions about the competencies needed and desired to build a foundation for the state desired. All levels of management weighed in on the new competencies and behaviors that would indicate demonstration of the identified competencies. Self and other evaluation of the management teams development revealed that the new competencies were a stretch for the team and was a new way of thinking with regards to recruitment of new individuals in the organization. This signaled a readiness within the organization to embark on change and move to a new level of operating.

Note 2: We pause here to emphasize again the importance of taking time and care in this phase. This deep dive in Phase I lead to understanding the organization in critical areas including 1) motivational triggers for change, 2) the history and capacity for change in the organization, 3) the readiness and capacity to embark on change and 4) the identification of the core business area, (the why of the business) revealed the area of change that would derive the biggest impact, and made it much cleaner and easier to identify the evidence based approach that would be assessible to the organization to successfully engage in the change process

With “conversations” being the element of impact identified within the organization, the researcher had a hunch that the foundations of the coaching conversation might play a critical role in providing a framework for the change that the organization desired. The researcher introduced the benefits of a coaching culture to the executive leadership. These benefits aligned almost exactly to what the leadership team wondered about and hoped for in envisioning how the leaders and staff would interact. With agreement from the leadership team that this seemed like a direction to explore further, the research focused then on the ‘conversation’ and coaching conversations, highlighting the four success factors Q L P R. The OD team confirmed that while there was room to make these elements more explicit. The OD team also confirmed that the success factors aligned closely with the competencies that were newly identified. The team was using a competency program that also had an emotional intelligence component and mapped the areas where EQ was embedded in the competencies.

Note 3: An important element of Phase II was the continued engagement of the leadership team. Their involvement in the research review and discussions regarding what could work for the organization - in and of itself - began the work of change within the organization. For example, as the team talked about what it means to be present – two members of the ELT took the initiative to begin to engage their teams by use inviting questions to spark discussion and broaden thinking. The respective teams independently report being excited about this new level of engagement which gave them a sense that their leadership cared about and wanted to hear their thoughts on varying topics. They looked forward to learning more about the process the ELT had begun to engage in and being equipped to emulate the practice with their staff. The level of comfort with the benefits of a coaching culture amongst the ELT also laid the ground work for introducing a Coach in the mix to support the creation of the development process for the leadership team.

Phase II also focused on exploring the structures that support systemic and lasting change in the organization. The structures identified would also have to facilitate and support continuous learning as a core value. A review of learning strategies in the literature revealed structures that seemed familiar to the leadership team. Small work groups and cross functional teams were a norm within the organization, so much so that the team wondered why then they didn't seem to render already the results they were now seeking. A closer look at the interactions within these groups revealed that while individuals were in the room, everyone did not seem to have a voice or contribute to the discussion or solution. Here the ELT began to understand better the application of being intentional in making sure that everyone in the room would have a real opportunity to contribute to the matter at hand. They also realized that learning the skills necessary to support healthy conversation throughout the organization was paramount to integrating and sustaining new behaviors.

Note 4: One of the things to consider when involving the leadership team at this level of exploration is whether they would play a role in limiting the approach or structures to those that would not adequately challenge the team enough to ensure radical transformation in thinking and application. Foundational to the coaching process is trusting the expertise of the client. Similarly is trusting the organization to know its environment and capacity to move its members to change. This team wanted change, and so was interested in pushing the envelope to a level that would truly support change, particularly amongst the next level of leadership. Adding the external coach to support the leadership team on this part of the journey helped to guard against attempts to adapt a process that would not adequately move the organization forward.

Lastly, in Phase II, the ELT was leaning towards adopt the concept introduced as Manager as Coach. They recognized that it would be too much of a stretch to identify and train individuals throughout the organization who could serve as coaches, as other organizations have done, and too resource intensive to hire the number of coaches needed to facilitate this infusion of skills to create change. This framework of Manager as Coach resonated with the team, as they could see it serving to facilitate one of the values they articulated, that is to be an organization of leaders developing leaders at every level. And, so, Leader as Coach became the way they began to internalize the path they were now planning to take the organization through.

Phase III of the coaching process takes us to focusing on the action strategies that the organization would put in place to achieve the desired state. All the pieces were there to create the framework for change for this organization. Using the components of a leadership development program as a starting point, the OD team and Coach went to work to tailor a program that would support change in this organization. At its most basic point, that meant embedding the core success factors and positivity – Presence, Relating, Emotions, Positivity (PREP) – into every training program planned and every conversation. The was armed with the organization as the container, conversations as the vehicle, teams and work group as the structure, and PREP as the skills and behaviors to be demonstrate.

The entire Executive Leadership Team, (consisting of 10 leaders) has engaged in what has begun as a 12-month development program, combined with small and large group sessions, assessment tools, individual and group coaching and opportunities to practice skills. The program will be tweaked along the way to incorporate new learning and the support needed to achieve the desired state. The next level of leaders (55 leaders) will follow a similar program, with even more focus on practice opportunities. Other programs already planned for the coming year will be tweaked to incorporate the language and behaviors of PREP. Some of those programs include the following:

- A program already designed for managers and supervisors (# people) as a result of the physical move,
- The role out of new competencies (leadership)
- Specific and targeted development for phone representative (150)
- Enhanced training for all staff focused on service delivery (1200 employees over 16 months)

The expectation is to review all trainings, including on-line offerings to infuse elements of PREP. A sample of one or two levels of the program outline is included in the Appendix. Key to success will be the discipline of intentionality – to consistently infuse until new norms emerge for the organization.

Note5: Having the senior leadership on this journey allowed the researcher to incorporate more deliberately the elements of the organizations needs in the search for support. The process respects the organization, where it is, its need and capacity for change and growth. The approach not only minimized the resistance of the leadership team, but the engagement enhanced buy-in to the point where several began to ‘try-out’ elements of what they were discussing, with success. Though a large non-profit organization, it was important to understanding that the funds to implement a full-scale program would be limited. Yet, wholesale infusion would be necessary for there to be evidence of change in the short term as required. Given the limitations and the need, engaging the organization in understanding, selecting, steps for executing and tweaking their journey using the Coaching Process as a meta framework for research, discovery, and execution served the Organization as Client well.

Conclusion

The CEO of this Health Care Service organization was in search of an evidence-based model to guide their transformation to a more “member-centric” orientation parallel to the broader “patient-centered” orientation of the industry. This meant shifting their lens to adopt a viewpoint or mental model that would consider the actual experience of those they serve - the member. The Executive Leadership Team (ELT) embraced the vision and was prepared to work toward the goal of having every employee see their role as being connected to serving the members (whether internal or external) and would be inspired and empowered to challenge the way things have been done, to create a more wholistic view of the members experience, and, to have managers and supervisors view every initiative, every decision, and conduct every conversation with the aspiration of creating an organization that supported internal and external clients with a level of respect, inquiry, and support needed to provide the service desired. But how does an organization find an approach for change that is evidence based, practical and most importantly *scalable*?

The ELT had already begun taking steps to move the organization in a new direction, updating competency expectations to match the evolving vision, and defining what it meant to continue to improve service to its’ members. The charge became clearer as the CEO challenged the leadership to change their lens and perspective for thinking about how to serve the members. She offered that instead of looking at providing service from the organization’s perspective (all be it with member input and the intent of providing continually improving service) they would consider changing their lens, stepping outside of the organization to experience the systems protocols and communications from the members perspective and experience. This would require a reorientation in the way they thought about how the work is conducted

and how services are provided and evaluated. The leaders would have to be equipped to facilitate discussions with their employees, challenge underlying assumptions that have been made for decades about the way service is provided to the members, and most importantly, be willing to take on the task of changing systems and protocols as needed to meet new objectives.

In conducting the literature review, with the goal of supporting a path for organizational transformation, the researcher first began to explore benefits and impact of implementing a coaching culture. This was a natural step, as it aligned with a direction that the Organizational Development Department had begun to take. The benefits reported in the literature by organizations and individuals who experienced being a part of a coaching culture very closely aligned with goals and desires of an evolved organization expressed by the ELT. However, concerns quickly arose about the enormous amount of time, effort, and resources needed to prepare the organization to implement a coaching culture. The process of identifying and developing certain managers and supervisors to be coaches would be very disruptive to the roles and structure of the organization. And the time and resources needed to do so would be prohibitive.

The literature review crystallized the elements foundational to achieving the desired coaching culture; the coaching process would serve as the framework for exploring how to get there. What emerged was the “coaching conversation” as a vehicle to positively influence the core of the business – the engagement between employees and members - and to drive the culture in the direction of a new way of operating and being. All structures and protocols in the organization were aimed at making that engagement a quality interaction. And so, there was curiosity amongst the leadership regarding what it would take to enable conversations throughout the organization that had the effects of coaching conversations, but not be done by coaches.

Key coaching competencies were identified, starting with the International Coaching Federation, having the largest coach accrediting body and the largest coach affiliation. From eleven, six competencies were identified as being the underpinnings for conversational, relational and facilitative interventions. Of those the Columbia Coaching Certification Program identified, what they term as, the four success factors: Questioning, Listening, Relating and Presence. While Emotional Intelligence is a component of the success factors, the literature continues to expand on the values of emotional intelligence as a critical element for leaders in achieving sustained change. Rey (2009) highlights emotional intelligence as having emerged as the primary factor that made a difference to the success for principals, leaders in a \$30 Billion school system, who were required to navigate through a massive multi-layered system restructuring, functioning as CEO in addition to Educational Leader of their school. For those who were successful, it was their level of engagement with regards to emotional intelligence that made the difference. Boyatzis (2013) sites emotional intelligence as the element that unleashes creative possibilities in looking for options and solutions. Not just any emotion though, it is the positive emotions engaged in visions of an unblocked future that leads to the motivation to change and to sustain long-term change. Boyatzis (2018) goes on to share the Intentional Change Theory and its impact when coupled with activating positive emotions. When engagement around personal vision is intentional, the positive emotions experienced are activated creating the space and opportunity for thinking outside the box and motivation is ignited for promoting sustained change.

The role of manager as coach (Ladyshevsky,2010) provided framework for thinking about how to possibly scale this initiative of creating a coaching culture throughout the organization. The leadership understood that for change to happen they would have to be intentional about providing a safe learning environment to grow and make sure the structures were in place to facilitate and support opportunities to practice these skills, daily and with real-time feedback. Drawing from the literature on learning in organizations, (Rey, 2010) guided small groups, with internal coaching support was an avenue that could be adopted. That, along with informal networks supported by the senior and executive leaders (who would have individual coach opportunities for changing lens and leading with a different perspective) are too

supportive avenues that could provide the 300 supervisors and managers opportunities to practice and develop conversations that used coaching competencies as a vehicle for excellence. , with a focus on strengthening these competencies within conversations health with members and staff.

Armed with conversations as the vehicle the organization found the elements of a framework that would come together to create a framework for change. A program entitled Components of A Leadership Development Program (Boyatzis, 2018) provided the foundation for focus and growth that the Executive Leadership Team needed. Their program would be accompanied by support from a coach who would support the more transformative part of the work that was needed. As the team worked with the competencies identified around the coaching conversation, and in managing change in employees, they identified the following areas focus for development throughout the organization - PREP:

Presence (This goes beyond Self-awareness but the way the individual shows up to the conversation. This includes their ability to engage through deep Listening and asking Questions.

Relational (Social Awareness)

Emotions (Emotional Awareness)

Positivity (An environment that promotes positivity in thought and deed)

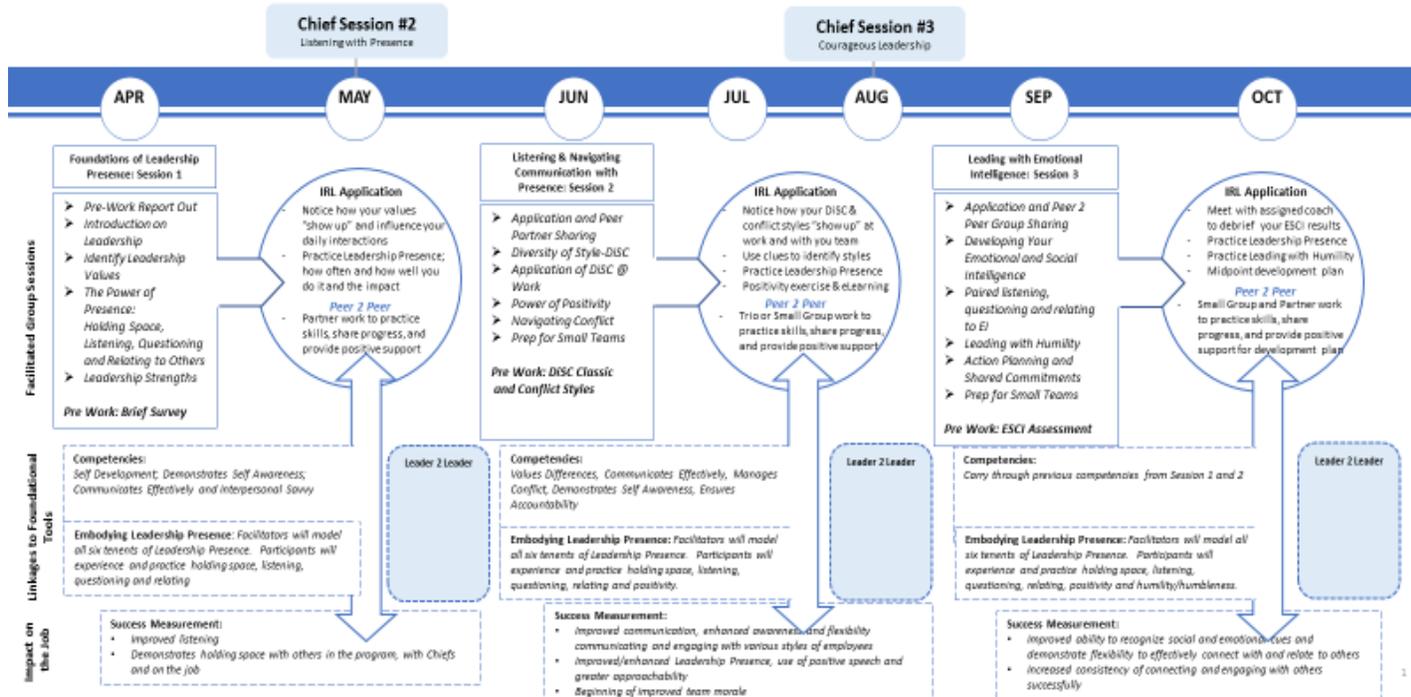
These areas of focus would have an opportunity to be learned in formal settings and demonstrated in small work groups and teams. Cascading these areas of focus throughout every single offering, infusing them in every group and individual conversation with focus and deliberateness takes the organization well on its way to truly having an environment of healthy conversations and *Leaders Developing Leaders*.

Appendix

Organizational Development, Talent & Learning

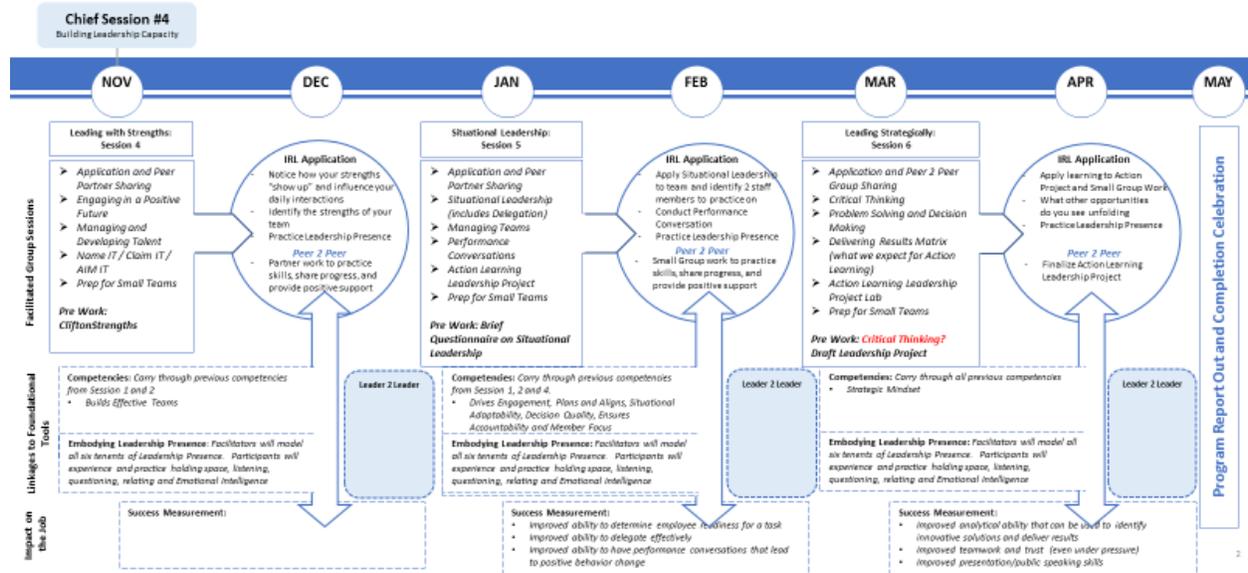


Grow Leaders 2 Grow Leaders for Director's





Grow Leaders 2 Grow Leaders for Director's



Manager/Supervisor Development Sessions 2019-2020

Get Ready, Get Set Go!

	May 2019	July/Aug 2019	October 2019	Nov/Dec 2019	January 2020	April 2020	July/Aug 2020	October 2020
What	Navigating Change	Let's Talk About Leadership & Engagement	Build and Champion the Team	How are We Leading?	Survey Results and Performance Management	Understanding Fragility and Supporting Others	Celebrating Success	Leadership Excellence
	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Overview of quarterly sessions ▪ Recap of Get Ready, Get Set, Go Initiative ▪ Mini module on Navigating Change ▪ <i>eLearning module to be assigned</i> 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Creating New Habits – Professionalism and Code of Conduct Reboot ▪ Engagement Survey review ▪ eLearning Module assigned 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Leadership Presence and Values ▪ Building strong team and championing the team to others ▪ Engagement Survey Action Planning 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Short Survey related to leading change as a part of the move 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Data report out "How are we Leading?" ▪ Performance Management Tools and Process 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Service Excellence Model for everyone and the reshaping of our culture 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ Celebrating successes of the move ▪ Lessons learned 	<ul style="list-style-type: none"> ▪ Key Fund Updates ▪ D/AD's LDP Report out and Presentation ▪ Leadership Excellence
How	Live Facilitated Session	Live Facilitated Session	Live Facilitated Session	SurveyMonkey	Live Facilitated Session	Live Facilitated Session	Live Facilitated Session	Live Facilitated Session
Where	330 Penthouse	330 Penthouse	330 Penthouse	N/A	330 Penthouse	330 Penthouse	498 TBD	498 TBD

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