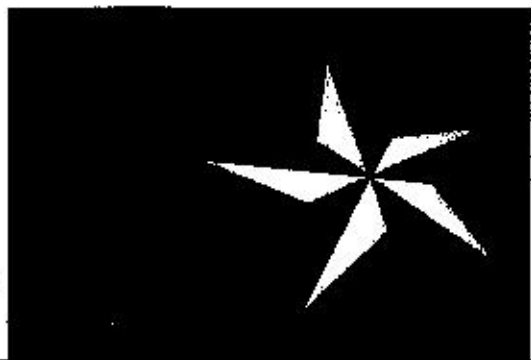


*"The Coaching Organization shows leaders how to integrate coaching in their organizations to achieve business results. Hunt and Weintraub are respected consultants and academics who have given us a fresh way of thinking about employee engagement and development. Organizations of all types could utilize the important lessons found in this book."*

—Jeff M. Fetting, Chairman of the Board and Chief Executive Officer, Whirlpool Corporation

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## CASE 7.2 The Management Effectiveness Business Partner

Steve Leichtman is vice president for human resources and management effectiveness consultant in a large financial services firm. He works directly with the heads of two businesses. He describes his responsibilities to his business partners as being “to help them achieve their business objectives in the near term and grow their skills and competencies in the longer term.” Steve is a midcareer executive with a long and successful track record as an internal organizational effectiveness professional. In several previous jobs, he developed a significant skill base in the provision of internal expert coaching services. Coaching activities now consume approximately 30% of his time. Steve stresses that he actually sees himself as a “businessman” who uses coaching in the service of his and his organization’s business goals. He talks the language of his business, financial services, and embraces the values of the firm. These factors all help Steve build credibility with his audience.

Upon entering his current role, Steve spent considerable time building a trusting relationship with the heads of the two businesses and developing a strategy to help them promote the success of their businesses. All agreed that “people management skills” were critical to their success, yet at the same time they agreed that there were significant organizational deficiencies in this regard. Coaching was a logical response in the context of this organization and its culture. This is a fast-paced firm in which people are much more likely to engage with on-the-job learning strategies than with

classroom-based approaches. The organizational need and context, then, served to drive the coaching initiative. Coaching became a means to an end, not an end in itself. The goal being an important one, the business leaders became active participants in the building of this coaching capability.

At a tactical level, Steve has found that coaching from an objective, data-driven perspective (i.e., one that relies on a thorough assessment) to be of most value to coaching clients. From a cultural standpoint, this is fortunate in that those in his current organization place great stock in the value of data. The approach he suggested to his business partners was consistent with the organization's culture.

The coaching plan involved the use of a 360-degree management effectiveness assessment tool and follow-up coaching for the purposes of building formal, work-oriented, and useful development plans. The leaders of the two businesses and their direct reports began the process themselves. They went through the 360-degree assessment and coaching process in a very public fashion. Everyone would be involved, and, as such, the organization avoided the trap of focusing coaching resources on problem performers, with all of the risks such an approach entails.

Through this process, the leaders developed a hands-on feel for what coaching could do, dealt with concerns and risk factors regarding the process, and modeled the creation of an environment that encouraged people to view coaching as a useful development tool. Subsequently, this process cascaded through the organization, ultimately involving over 60 individuals. (Steve has subsequently developed a team of internal coaches, including several senior human resource professionals also trained in coaching to address the needs of this large number of executives.) This initial coaching process served both to focus employee development efforts and build longer-term coaching relationships between Steve and those involved. Follow-up coaching, both formal and informal, is in the service of executing to both business and development plans.

Steve is able to leverage his close proximity to his coachees. He is in a position to appropriately but discreetly support observed behavioral changes or address the lack thereof, through observation and feedback. At the same time, however, Steve is very aware of the challenges of maintaining trust as an internal coach. As such, even given his close proximity to his coachees, he is very careful to manage the boundaries around coaching activities. For instance, he avoids becoming part of a triangular relationship between a direct report and his or her boss. Like the external executive coach, the internal coach has to manage multiple stakeholder relationships effectively by clearly and consistently delineating the goals of coaching relationships and the boundaries surrounding those relationships. Steve states,

I work with the managers of those being coached, primarily to understand their perspectives on my implementation of the coachee's development plan. I do not, however, share my coaching conversations with the coachee's boss . . . I leave that sharing up to the coachee [and encourage it].

So far, Steve, his organization, and his coaching clients are pleased with the results, and he has run into little skepticism. Steve is sensitive as to how coaching is viewed and may not describe his work with certain clients as "coaching." He believes that he is seen as someone who is trying to do the right thing and who is experienced in leadership development. From a results standpoint, development plans are in place for nearly 60 individuals and are being taken seriously. Extensive follow-up coaching is taking place to support the execution of those plans.

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As we have repeatedly stressed, trust is an essential ingredient of developmental coaching. The external coach has the advantage of being seen as an outsider and, as such, "trustworthy" by virtue of his or her lack of contact with some key organizational players (the more key players with whom the external coach is involved, the less this advantage is bestowed). The internal coach must establish and maintain "personal trust" based on his or her conduct and despite his or her participation in other organizational roles (Hall & Otazo, 1995).

Was this an ad hoc effort to build a coaching capability in Steve's business unit? It certainly began with one individual's vision for that capability. There was no designated "coaching function" in this case. However, Steve's ability to connect his vision for coaching with the business goals of senior management, coupled with a systematic rollout of a developmental coaching protocol, for all managers, illustrate the strategic nature of the effort. As such, it offers some important lessons. The internal coach, particularly the internal coach who is promoting a strategic approach toward building a developmental coaching capability, needs to be viewed as someone who has the following characteristics:

- Has the best interests of the organization at heart
  - Understands the organization and its business and is a true business partner
  - Has a robust coaching-related skill set and is able to articulate the nature of developmental coaching to other stakeholders.
  - Is truly engaged in helping others succeed and is seen as a resource
  - Avoids at all costs the use of information to enhance his or her personal position within the organization
  - Is clear about confidentiality or its limits with all parties and educates coaching clients with regard to the limits of confidentiality on a proactive basis
  - Serves on occasion as a resource for individuals with performance problems, but for the most part is seen as a developmental resource (not a "signal" that one is on the way out) to good and great employees who are likely to be most able to take advantage of the coaching effort and at the same time contribute to the organization's goals.
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