Coaching at the top: a hybrid, 'agenda based' approach

The challenge

The client is at the top of their game, appointed to the summit of the professional tree. Their rise has been rapid, skipping steps in a traditional route that would ordinarily have offered graduated exposure to leadership and management dilemmas.

The challenge? How best to help equip them with sufficient levels of the right leadership knowledge and best practice, in real-time, to support the transition?

The choices – educate, advise or coach?

The original request was to run, in quick succession, up to three half-day tutorials of tailored executive education covering best practice in the ways successful top management address typical challenges and the solutions they adopt.

Easy to do, in many ways! Roll out some classic frameworks and case studies in areas such as leadership and strategy and deliver a 'mini-MBA' focused on the 'soft' skills. But is that what they really want or expect? Does it fit their needs? In any case, if they have reached the top, aren't they likely to have a sound skill-set already?

The risks are like taking time with Roger Federer, arguably one of the world's finest-ever tennis players, to talk him through best practice in serving or top-spin forehand. As he undoubtedly knows this already, the discussion is likely to leave him cold, irritated and frustrated. In any case, his challenges are likely be different, more about mind-set, confidence and assurance than technical skill.

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So, education of itself is clearly not necessarily the right way; what about coaching?

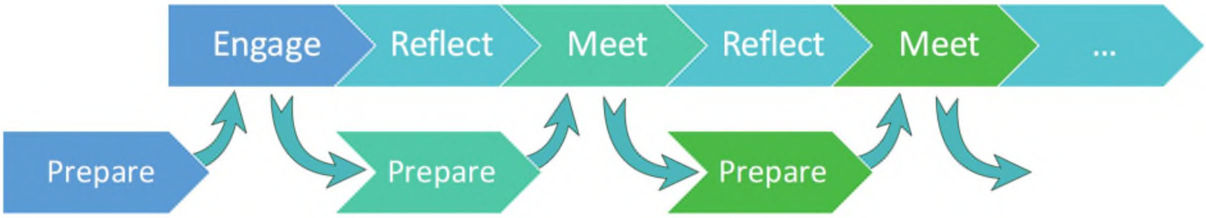
Coaching is a generally reflective approach. It helps the person explore for themselves the best ways forward, the most effective principles to guide plans and actions. It is much more focussed…but does it offer enough to someone who must gain knowledge at the same time as they need to execute. Does it offer sufficient 'hooks' to guide their actions?

So, what about simply offering advice? Advice pre-supposes we are the expert, we know better. Yet their position is unique. There are common patterns to be sure, yet we are different people facing different situations and thinking about them in different ways. Like education, advice stands the risk of being misdirected, misconstrued or even polarising the working relationship.

So…coaching is not enough…and education or direct advice is unlikely to hit the mark either.

This is another 'both/and' rather than 'either/or' situation. It calls for a hybrid approach. Coaching with an explicit agenda. Advice-cum-education but delivered in a coaching style.

The approach



The hybrid method became the agreed and adopted approach with one early twist; the client was new into an extremely demanding role and quickly decided they could not afford the luxury of three half-days away during the critical first 90. For this reason, whatever the merits and demerits, the pattern of interaction quickly changed to a longer series of shorter, 1½-2-hour meetings every 3-4 weeks. At first glance a classic coaching outline if with several significant twists:

Significant preparation required. The hybrid approach needs the consultant/ educator/ coach to flex and meet the client's needs *as and when they arise*. These times can only be partially anticipated; significant preparation is needed to ensure right material and frameworks were ready for the right time.

Engagement. The first full meeting was crucial for exploring current and desired future states and for establishing goals. It was also important to set expectations for how the meetings would run.

For many reasons it was not appropriate to establish the current position by seeking evidence from others – for example through a traditional 360-degree assessment – so we had to rely on the awareness and perception of the client themselves. A powerful tool for this was an analysis of their views about leadership using Repertory Grid techniques. It provided a real grounding in which success criteria came from the client themselves not a third party. A short psychometric also supported the process. (In this case the first meeting lasted 4 hours. Subsequent meetings lasted 90+ minutes).

Reflection & 'Field-Work'. To increase awareness of positive as well as less-effective patterns of behaviour, the client took a few minutes each day to note reflections in a Working Journal and a slightly longer period towards the end of each week to plan the next. This process was supplemented by suggested readings – articles or in some cases books – all of which were tied to the ongoing discussions or selected as potentially helpful in the eyes of the consultant.

Subsequent meetings. See panel for an outline of the rhythm that emerged for the regular 90-minute meetings.

Typical schedule for the regular 90-minute meetings

1st 30 minutes:

- Agree agenda for meeting.
- Reflect on critical events since last meeting, reflections on Working Journal etc.
- Follow-up on topics/frameworks introduced in previous session.

2nd 30 minutes:

- Introduce framework(s)/best practice as appropriate, linked to earlier discussions.

3rd 30 minutes:

- Discuss relevance/ application, especially implications for handling critical events, either past or upcoming.
- Aims, plans and actions required for the coming few weeks.
- Anticipated challenges and to address them.
- Review of meeting and check for value etc.

Reflections on running a hybrid (Agenda Based) coaching engagement

The process was well received and successful. Here are some reflections and learning from the assignment.

The Agenda – frameworks, inputs and advice

- Get them right – the right input at the right time introduced in the right way – and frameworks and advice can provide a timely injection and insight that can be applied directly. What's more, just-in-time interventions like this demonstrate you are following the client's agenda, not your own.

But it has implications for the consultant/ advisor/ coach...

Preparation

- Full range of topics. Develop a full range of inputs/ frameworks based on: a) what you know or anticipate are going to be of interest to the client, and: b) your own views of the issues and factors that are impacting performance.

  This inevitably means preparing more than you need. You cannot know exactly what you will want or when and may need to prepare in the ratio of 4:1 to make sure you are covered. The same goes for selecting material – articles, books – for the client to read between meetings.

- Interactive delivery. Time is short so plan how best to introduce each topic. My personal preference is to make it interactive. For example, briefly introduce a framework (such as research based on the 'Eisenhower matrix' on how top executives invest their time) and facilitate a discussion based on this.

  A good device can be to produce a PowerPoint presentation with a main menu hyper-linked to topic pages that can be selected in the moment and shown informally on a laptop.

- Be ready to change tack, to use different material, or none at all, as the situation requires.

- Review your plans, especially after the initial engagement meeting. The outcomes may change your view of what needs to be covered in subsequent encounters.
- Keep up with what's happening in their world. What are the current priorities in their area? What is trending? What is happening in their market or environment? A hybrid or Agenda-Based approach demands you can demonstrate sufficient understanding of the issues and implications.

Running the meetings

- 'Signpost'. Be clear from the start of each meeting about the planned structure, what you plan to do and why. Be prepared to revisit this from time-to-time. Clients who are used to coaching, executive education or receiving advice from consultants can find the hybrid approach confusing at first.
- Short, simple inputs. Make inputs short, simple and interactive. This discipline helps resist the urge to expand on favourite topics. It also keeps the agenda tied to them, not you.

Mind-set

- Aim to become a trusted confidante, bringing value by navigating the right course between educating, coaching and giving advice. Gaining trust means you get to the heart of issues quicker and so make the meetings more productive.
- Be clear about your role: 'where do you want to be?' on the spectrum between coaching and advice/education. Be clear why this is important to you and make sure you can articulate it concisely.
- Beware the power of ego! You are experienced and likely to know more than they do about best practice in leadership and management. Equally, it is unlikely they have reached this position without having accumulated considerable skill. So, introduce your knowledge and expertise with care. Don't flaunt it. It's their agenda.

Be aware

- Beware of just becoming a sounding-board. It is lonely at the top and a trusted confidante can be an asset when it comes to testing thoughts and plans. A client once referred to it as an opportunity to 'kick the tyres'!

  It can be valuable yet risks being short term in outlook. Just following the interests of the client risks getting into too much detail. Equally, it can allow them to take the discussion into areas you believe will be less productive...or wide of the agenda.

  Bringing the meeting back on course is a core skill.

  If helping to resolve short-term challenges is the overall aim, that's fine. If the aim is to yield longer term benefits, the process needs to leave the client with tools and ideas that will last well after the project has formally ended. For example, longer-lasting outputs might include: helping identify patterns in behaviour, times when they tend to be effective…and what triggers less effective responses; establishing principles that will guide future action; helping establish a pattern of 'learning-to-learn', increasing their ability to monitor and adapt for themselves.

- Involve stakeholders. However senior the client, it helps to have someone else involved even if they have a more distant role. This will be someone trusted by the client, who knows their situation from the inside and who has a perspective on what the goals of the engagement need to be.

Epilogue

These notes are drawn from an actual, 1-1 engagement. They are not comprehensive, yet I hope offer a sense for the thinking and practicality that lies behind an effective, hybrid, agenda-based approach.

In a wider context, the overall aim is to improve adaptability, agility and collaboration, critical abilities for individuals and their organisations in complex times. As every student of complexity science knows, complex systems contain fractals, repeating patterns often based on simple rules. This case has been based on a successful 1-1 assignment. Yet, like a fractal, the principles outlined here are equally applicable – with great impact – for groups, teams and departments that must collaborate to bring about step-changes in performance and approach.

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Scott-McGregor helps leaders, teams and the organisations they serve improve performance by focusing on the quality and effectiveness of interactions. We believe collaboration and coordination are critical to agility, adaptability and performance in complex environments.

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