

# Coaching Beyond the Team



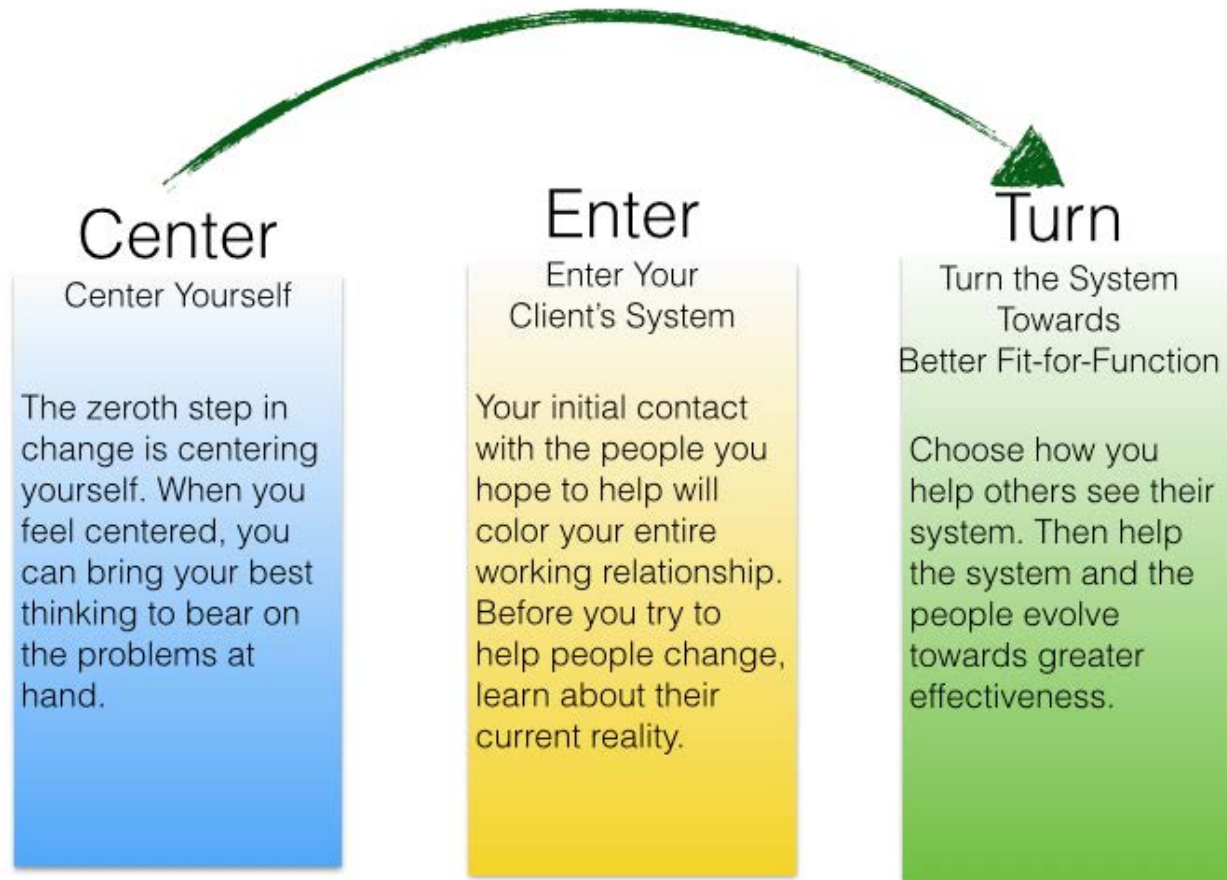
*Expand the scope and value of your coaching*

## Methods, Models, and Tools for Influencing the Organization

**Esther Derby      Don Gray**

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# Where We're Headed



# **Intentions**

**I'm joining Coaching Beyond the Team because ...**

**My most important challenge right now is ...**

**The level at which I'm focused on creating change is (personal, organizational, systemic, etc.) ...**

**The Coaching Beyond the Team will be a success for me when ...**

# Questions for Centering

## Self

How do you feel about your current change assignment?

How do you feel about the change you are helping people make?

How do you feel about the people you will be working with?

## Context

What are the benefits that will accrue from this change?

How will this change benefit customers, stakeholders, employees?

What problem are people hoping to solve with this change?

## Other

What are five good and valid reasons the people you are working with might have for not changing?

What exists in the organization that might keep people from successfully making the change?

Which of these factors are in their control?

Which are within their sphere of influence?

Which of these factors are in your control? Your sphere of influence?

# Entering Groups

## Three Common Entry Mistakes

Failing to....

- Make contact and establish relationships before offering help and ideas.
- Understand the group, how the group viewed issues and develop empathy for their struggles.
- Orient to the group's goal, history, and context and see how their ideas could fit in.

## Four Strategies for Connecting with a Group

- Get to know the other group members and become known by them.
- Learn something of the group's history and context.
- Orient themselves to the goal, tasks, and priorities of the group.
- Look for ways to contribute that line up with those goals and priorities.

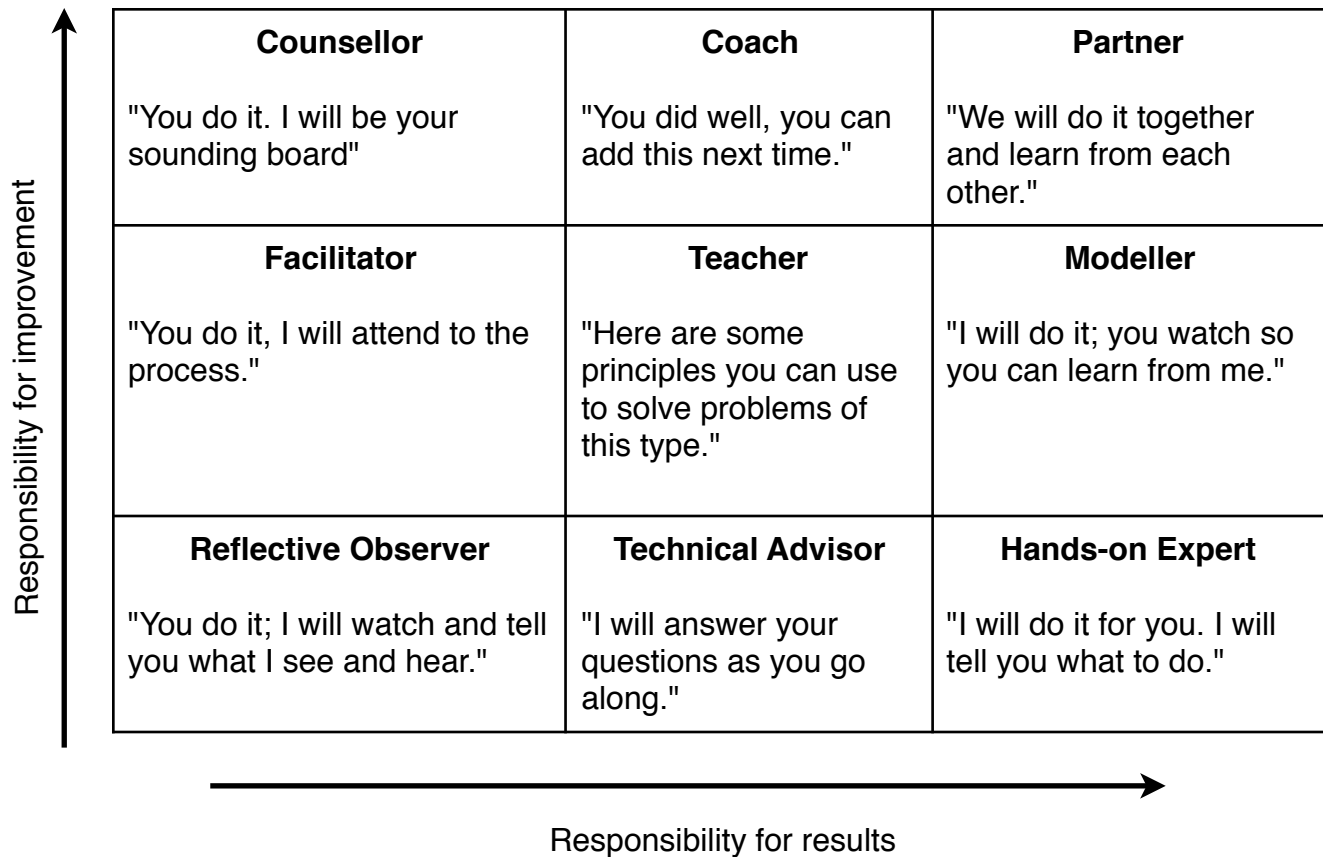
People have different needs for affiliation and inclusion, which affect how they go about entering. *This is especially important if your views are divergent from the rest of the group.*

## How Humans Experience Change (Fractal)

The Satir Change Model



# Coaching Roles



# Reframing

Looking at your Rapport Map, who do you need to influence, but describe in a negative way?

Write the words you currently use to describe this person in the Current Description column.

Then, describe the same characteristic in a neutral way. From there, look for a way to describe that characteristic as valuable. For example:

*Stuck in his ways* (current) → *Values routine* (neutral) → *Reliable, a stabilizing influence* (positive)

Current Description	Neutral Description	Positive Description

Current Description	Neutral Description	Positive Description

Current Description	Neutral Description	Positive Description

# Positioning & Permissioning

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## Position Your Conversation

**Status.** The other person's perception of your status relative to theirs affects your ability to influence. Taking offered help or asking for help can make people feel one-down.

**Ignorance.** Neither you nor the other person know everything about the current situation. Acknowledging that there are gaps in your knowledge can reduce threats to status..

Remember what the conversation **is** and what it **is not**. Are you sharing observations, looking for perspective, walking through data? I stay away from positioning the conversation as "looking for your opinion" which tends to cement their view of the issue and limit the definition of the problem (and possible solutions).

**Mutual Purpose** is the key that opens the door for influence

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## Be Aware of the Level of Discussion

**What and Why:** Where they'd like to be, what they want to achieve relative to your engagement—relates mutual purpose

**How:** *Planning*—useful but not what you probably need when you are in the initial stages of influencing

**Details:** Only useful after you understand the What and Why

**Problems:** What is going wrong. Starting here cements their definition of the problem and solution

**Emotion:** What's left when you aren't talking about the other levels.

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## Ask Permission as You Go

Permissioning is gaining agreement to pursue a topic in greater depth, ask more personal questions, change topics, or change levels. People might answer your questions without permissioning, but you want them to go with you freely. Without agreement, people may feel interrogated or intruded on.

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## Resources

Helping and The Art of Humble Inquiry, both by Edgar Schein.



# Rapport Conversations

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## Preparation 1: Purpose, Data, Feelings, Fears

### **For yourself:**

My purpose:

What have I observed?

What is my data (data form, rather than value statement or judgement)

What is the impact on the team? On the goals the client has stated to me?

What feelings do I have about this situation?

What do I fear this situation says about me? What parts of this are true? Which are not?

### **For your client (*empathize and verify*):**

What is their purpose in your consulting engagement.

What might they have observed?

What might their data be?

What impacts has the client mentioned? What else might they have observed?

What feelings might they have about this situation? (empathize, and hold as a hypothesis)

What might they fear it says about them?

<sup>1</sup>Adapted from Difficult Conversations by Douglas Stone, Bruce Patton, and Sheila Heen.

# Rapport Conversations

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## Preparation 2: Design a Conversation

**Create an opening.** Find a time and place. Neutral ground is often preferable. Avoid potentially oppositional status messages, such as sitting across from each other at a big desk or table.

**Thank** the other person. Acknowledge their time and attention.

Share your ...

context

data

impacts

possible interpretations

Invite them to...

fill in the gaps

add to

add to

add to

Then:

Ask for problem solving.

Agree on follow up (if appropriate)

# Building Rapport

## Three Rules for Building Rapport

### 1. Don't argue.

If you lose, you lose the argument, look foolish, and lose trust and rapport. If you win, you'll create an enemy and lose trust and rapport.

### 2. Don't turn the interview into a training session.

If the person you are talking to hasn't accepted you as a teacher, you've broken an implicit contract, rubbed someone the wrong way and lost trust and rapport.

### 3. Don't talk more than the other person.

Rule of thumb: talk 30% at most; listen 70%.

# Notes on Metaphor

Metaphors shape how we think and how we view situations. Metaphors shape how we see both problems and potential solutions.

98% of thought is unconscious, “running on automatic pilot.”

Metaphor != flowery language

Metaphor is experiencing one thing as if it were another

Basic elements:

**Frames** are cognitive structures we use to think.

The **words** we use evoke frames.

Frames have **roles**, a cast of characters, relationships between roles, and **scenarios** that are acted out by those playing the roles.

Example: Hospital

Roles: doctor, nurse, patients, visitors, orderlies, janitors

Scenarios: checking in, having an operation, being examined, visitor coming to see a patient

Our minds work against breaking the frame—that is, roles acting out of their expected relationships and scenarios. In the hospital example, we wouldn't think of a patient performing an operation. This is probably fine when you are in a real hospital. But, when you are not in a hospital but are using “hospital” as a metaphor, you've placed a limitation on your problem solving.

Consider how using the metaphor of “building a house” when we talk about creating software helps in some ways, and limits in others.

**Narratives** are frame-based scenarios, with additional structure.

**Protagonist:** narrative is told from Protagonist's POV.

**Events:** good and bad things that happen

**Emotions:** that fit the events.

Example: The Rags to Riches

initial state, protagonist is poor (sadness, pity)

intermediate state, hard work (frustration, satisfaction)

final state, wealth (joy, pride)

Once a metaphor based narrative takes hold, facts and logic won't dislodge it. But, you may be able to replace it with a more appropriate metaphor. Better yet, you can use language that describes the actual experience rather than relying on a secondary experience.

Adapted from George Lakoff

# Shape of the Problem

## A method to

- Show ripple effects and interconnectedness of issues that may seem simple on the surface.
- Illustrate how other people and groups are effected by a problem that may seem local
- Allow others to see the scope and impact of problems beyond the team

## State the problem in data form not value statement:

- “Late for meetings” not “disrespectful”
- “Multitasking” not “doesn’t care”
- Find who is affected by the problem.
- These could be individuals, groups or containers.

(Containers “hold things together,” e.g., teams, departments, specialties, functional groups, projects, revenue.)

## When & How

Use this method...

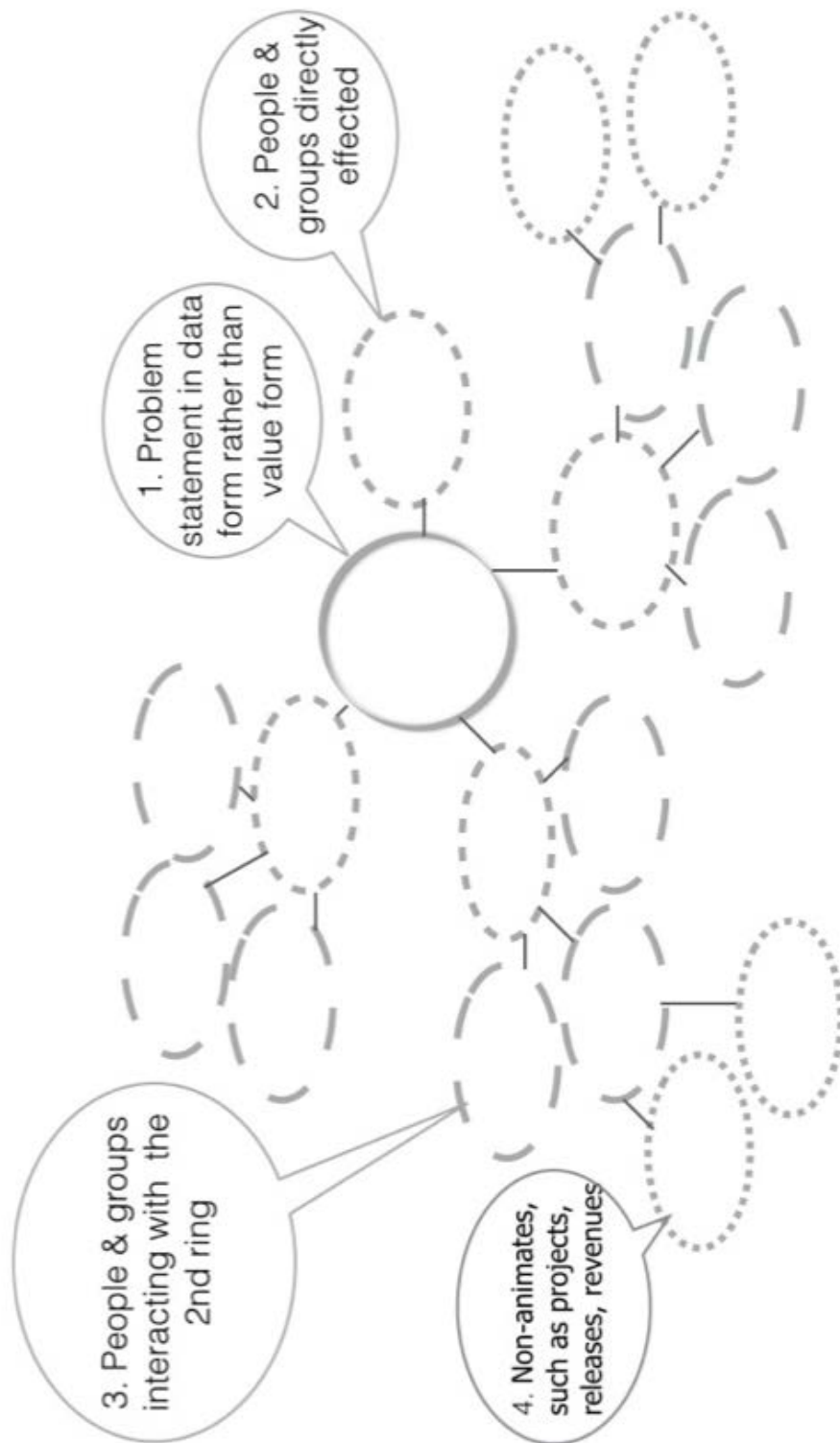
- when you suspect there are ripple effects but others aren’t seeing them.
- when the problem is pegged to individuals, but you suspect their behavior is part of a larger pattern.

## Helpful Questions

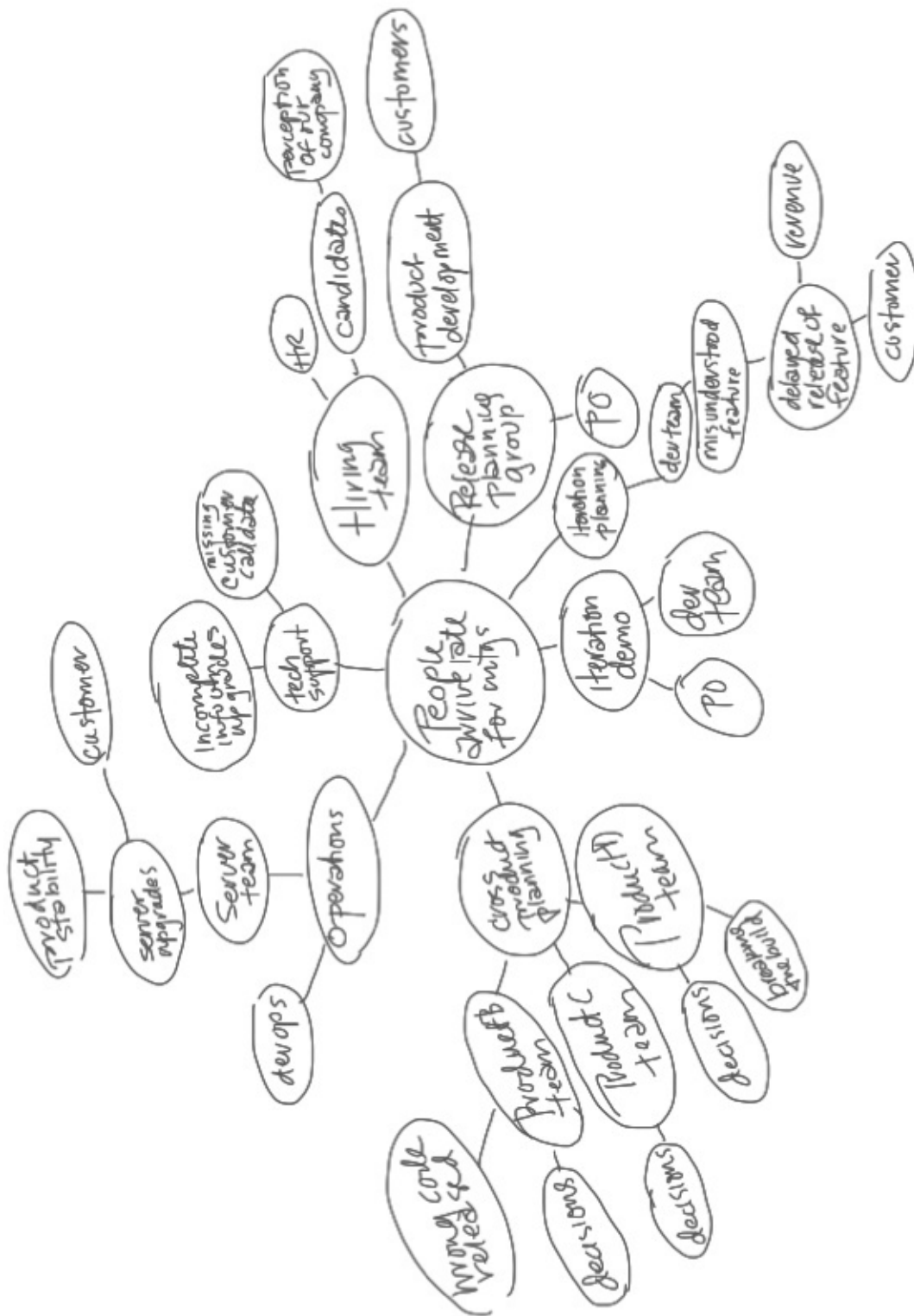
As you sketch the shape of the problem, consider these questions...

- Whose problem is this?
- What does it look like from [other stakeholder]’s point of view?
- Have I jumped to conclusions or solutions?

# Shape of the Problem



# Shape of the Problem



# Finding Factors

## A method to ...

- Think more broadly about what factors might influence the problem.
- Develop a sense of what factors are mostly closely associated with the problem.
- Set the stage for reasoning about causality and interconnections.
- Identify which factors you might want to observe or measure.

## How to:

- Brainstorm a list of quantitative and qualitative factors that might influence the problem situation.
- Combine those that seem like duplicates, and winnow out those you think are least important.
- Once you have a list, refine it:
  - nouns or noun phrases, not verbs. “distance” v. “walking between buildings”
  - potentially measurable, test that you can gauge the level of, number of, size of...
  - neutral or positive. “meeting quality” v “poorly-led meetings”

## When & How

Use this method...

- when you want to move beyond blaming the usual suspects.
- to understand the dynamics and entwined causality of a situation.

Brainstorm a list with the people you want to influence. Worry about transforming the list into measurable and neutral descriptors after you have a good list of potential factors.



# Finding Factors

Original List	Neutral or Positive	Potentially measurable
number of meetings	number of meetings	# of meetings
too much travel time between meetings	meetings far apart	travel distance
poor facilitation	improved facilitation	quality of facilitation
lack of purpose	purpose	clear purpose
no facilitator	improved facilitation	quality of facilitation
lots of strap hangers	strap hangers	# of strap hangers
meeting don't start on time	meetings start on time	# of meetings starting on time
		# of meetings ending on time
too many meetings	meetings	# of meetings
		# of people on time
		# of back to back meetings
no breaks between meetings	breaks between meetings	time between meetings
lack of action points out of the meeting	action points	meaningful outcome
many people late for meeting	people late for meeting	# of people
Meetings too long	long meetings	Meeting length
confused agenda	clear agenda	meaningful outcome

# Circle of Causes (Gozinta)

## A method to

- Connect the factors to each other
- Find a place to intervene that will have a broad effect
- Allow others to see the entangled causality

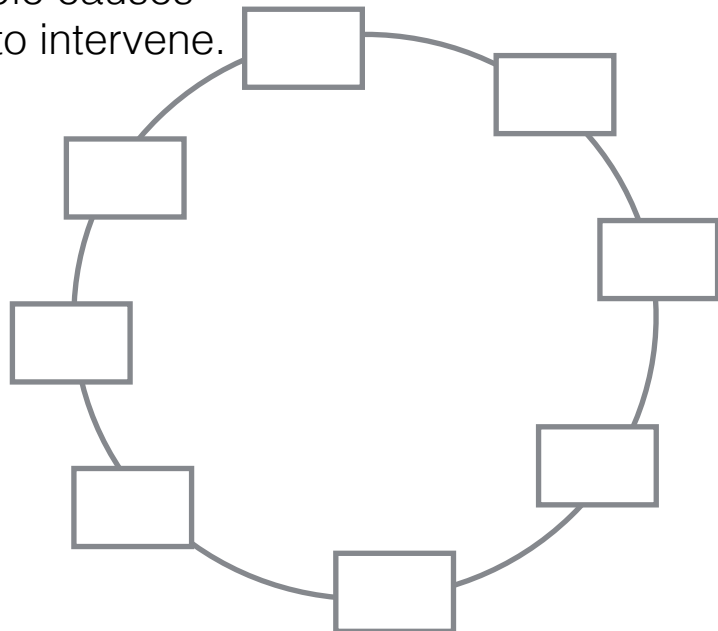
**State the factors in neutral or positive language (see Finding Factors).**

quality of code vs. poor code quality  
skills vs. lack of competence

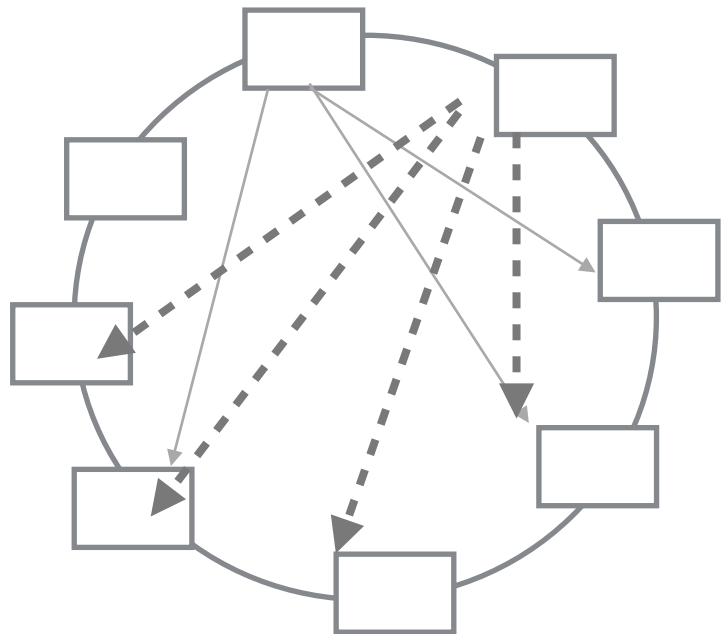
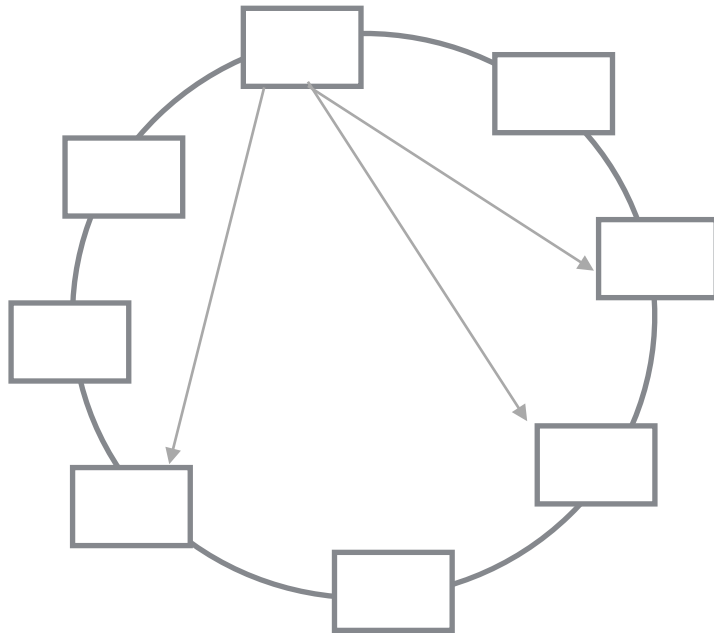
## When & How

Use this method...

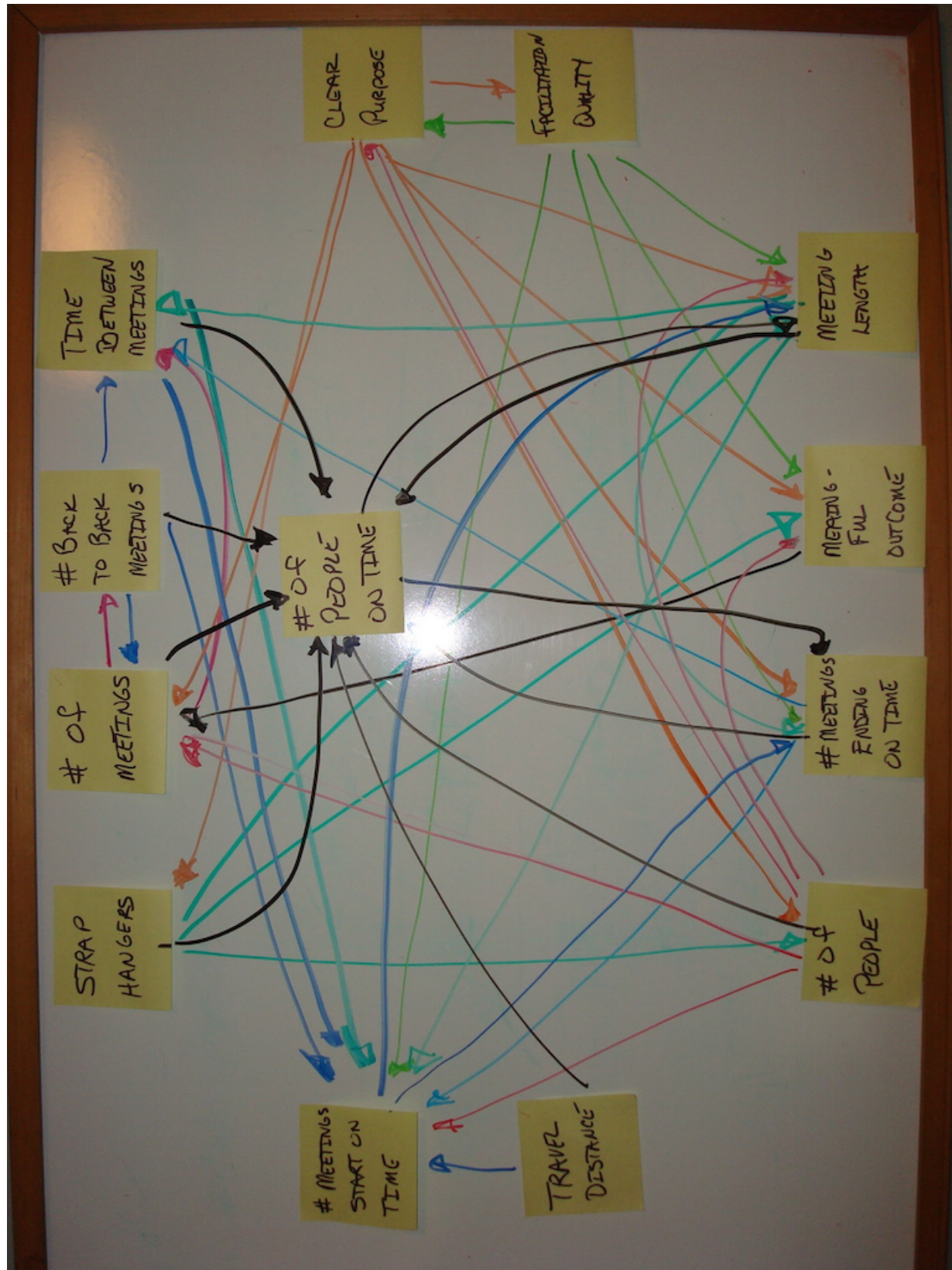
- in conjunction with “Finding Factors.”
- when there are multiple causes
- to find a likely place to intervene.



# Circle of Causes (Gozinta)



## Circle of Causes (Gozinta)



# Influence Diagrams

## A method to

- Understand how factors relate to each other.
- Provide an clues about where to intervene for most benefit.
- Provide clues about effects and side-effects.

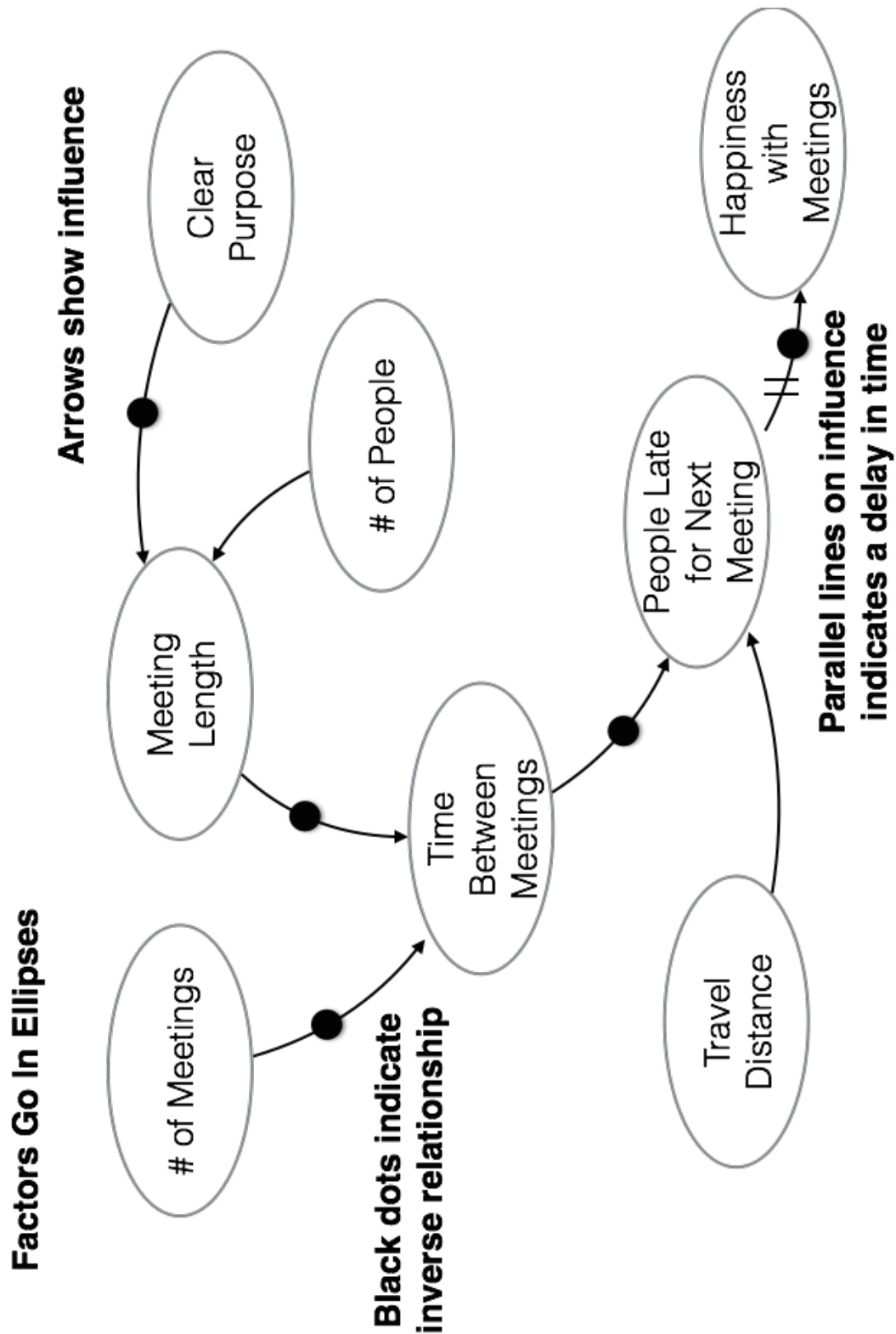
## When & How

Use this method...

- to reason about non-linear, indirect causality.
- move beyond the usual suspects and understand the dynamics of a situation.
- find options for action.

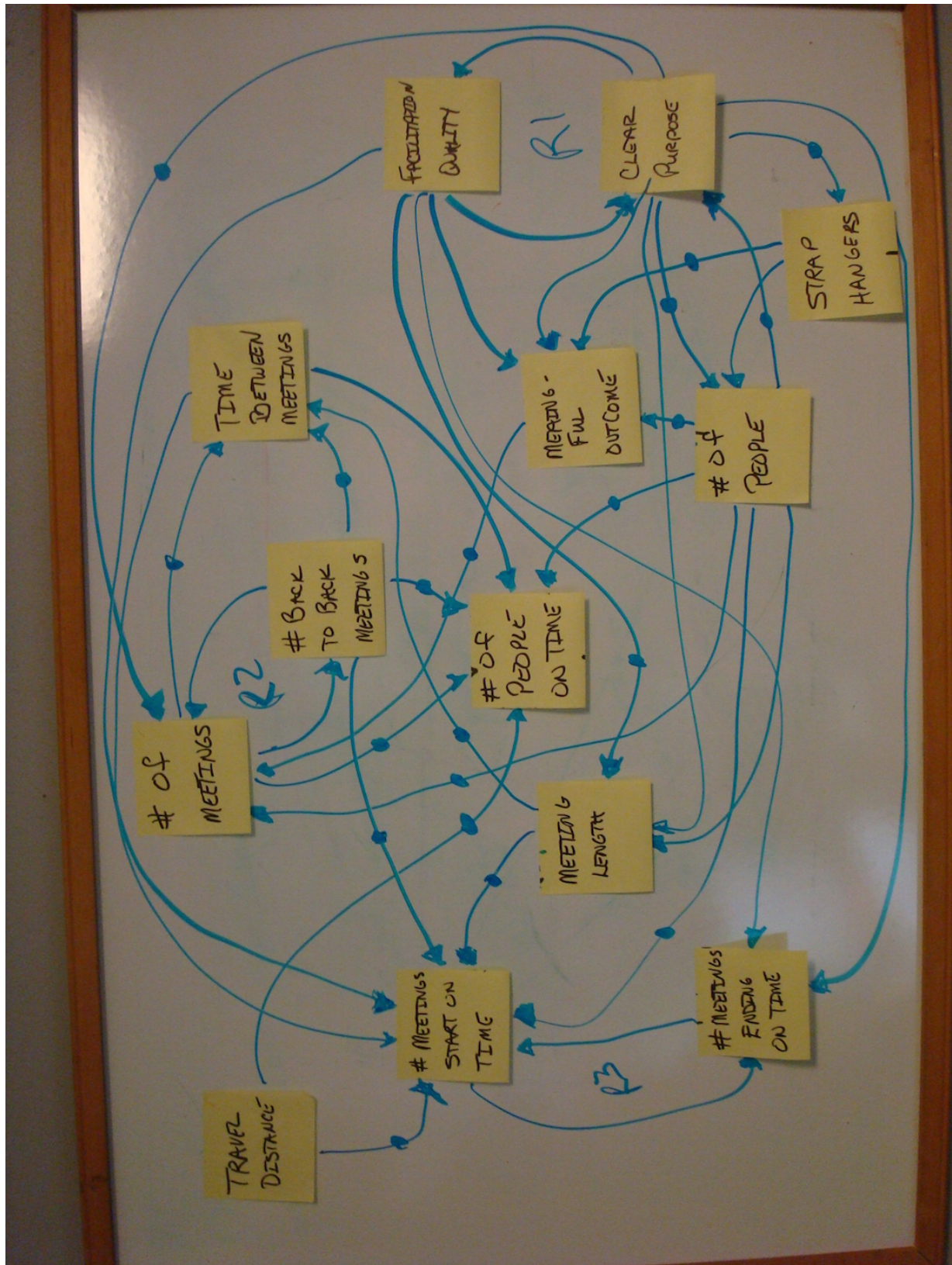
Develop an initial sketch, then invite the people you want to influence expand it with you.

# Influence Diagram Elements



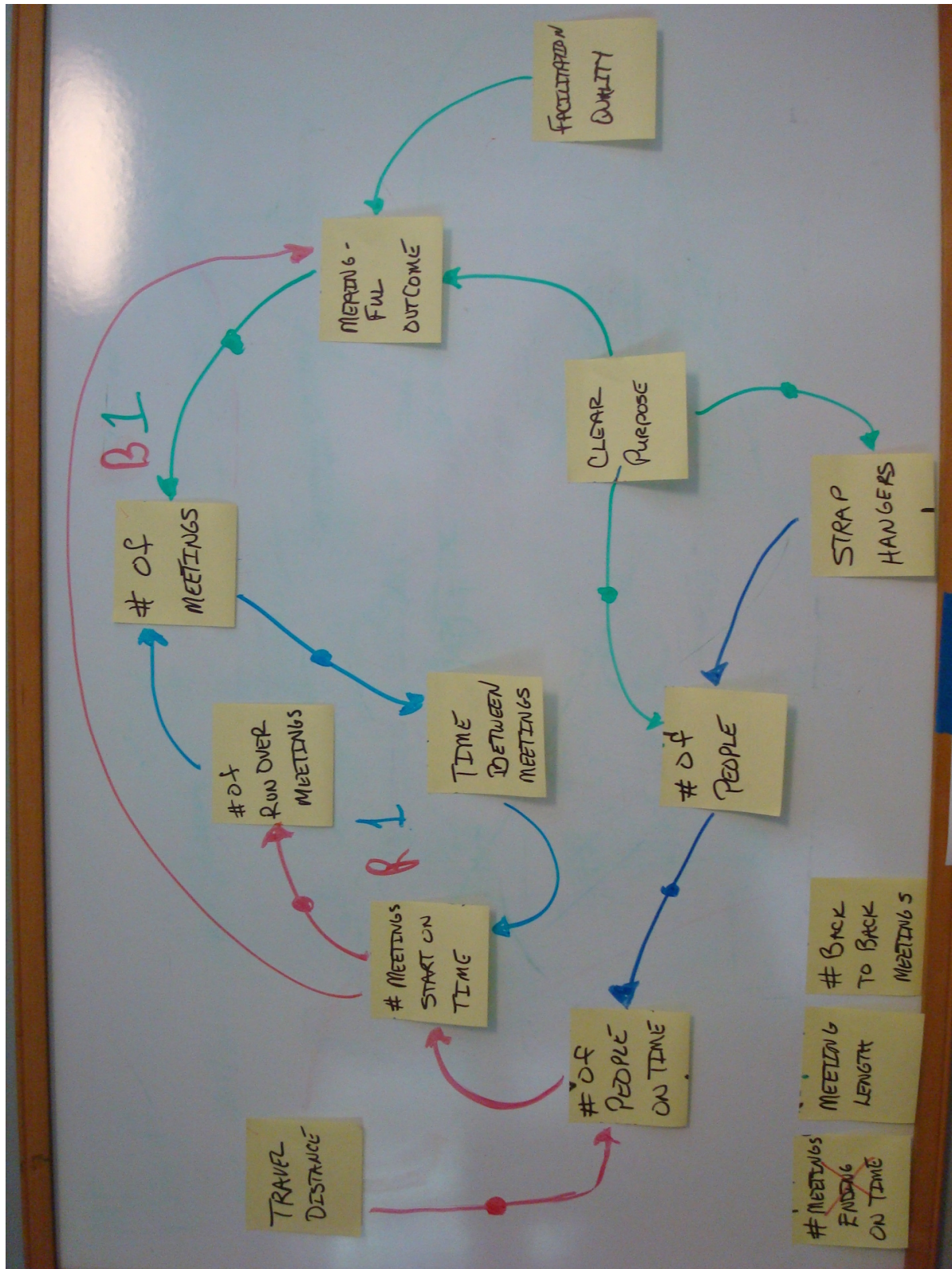


# Influence Diagram Elements





# Influence Diagram Elements





# CDE

## Visible and Invisible Structures Shape Patterns of Behavior

**Containers** hold the focus of the group. Containers can be

- physical—a team room
- organizational—a department
- psychological or conceptual—a goal, a set of professional concerns

Some containers are obvious, others are not.

**Differences** are just that, differences among the people within a given container, or between containers. There are an infinite number of difference, but not all of them make a difference—hair color for one example. Differences hold the possibility for constructive complimentary action or for conflict. Some differences are negotiable and mutable (e.g., skills) others are not (e.g., gender).

**Exchanges** are the flow of value (information, money, energy, social connection) within and between containers. Exchanges might be allocated funds, salaries, policies, formal and informal communications.

(From the work of Glenda Eoyang.)



# Experiments

Big changes can evoke big fear. But small changes--experiments--aren't an existential threat.

Experiments are an opportunity to learn. Answering these questions will help frame experiments for learning.

What is the problem you want to work with \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

State the problem as a question. \_\_\_\_\_

Characterize the current state. What can you count or observe? \_\_\_\_\_

\_\_\_\_\_

What would be more desirable than the current state? \_\_\_\_\_

\_\_\_\_\_

What other factors may come into play? \_\_\_\_\_

\_\_\_\_\_

What factor will you change? \_\_\_\_\_

What will you measure or observe? \_\_\_\_\_

How much time should you allow for the experiment? \_\_\_\_\_

What would you expect to see if your experiment is having the desired effect? \_\_\_\_\_

\_\_\_\_\_

...and if it is not having the desired effect? \_\_\_\_\_

# Subjective Impact Analysis

This is a technique that helps people to focus attention on hard-to-count benefits as well as easy-to-see costs.

## **1. Identify the proposed alternative(s).**

It's almost always useful to consider at least three alternatives. Even when the first option that comes to mind seems like the best, you'll understand more about it for having delineated more than one approach.

## **2. Determine what is important to your manager.**

People are more likely to consider proposals that speak to issues they care about. You may think you already know what is important to the person you want to influence—meeting a budget target or a quality standard or sustaining morale, but it's still a good idea to sit down with the person you want to influence and ask. You want to know what's important relative to her issues and what factors would help her make a decision.

## **3. Identify credible sources.**

Quoting an expert whom the person you want to influence believes is a bozo won't help your cause. You need to know who that person believes is credible—whom she would listen to regarding your case. (If there's no one she'd believe, that's another problem.)

## **4. Create a short interview protocol.**

Outline a short questionnaire—about four to six questions—and use them to guide your interviews. Frame your questions to elicit information about the factors your boss cares about. You can ask free form questions to follow up on interesting answers as well.

Here's an example of the questions I used to uncover benefits of a production turn over meeting in a mainframe environment.

- What gaps and issues came up in the review that could have caused problems had they been discovered in production?
- What was the biggest problem discovered in the review?
- On a scale of 1 – 10 (1 = negligible impact, 10 = disaster), how big would that problem have been?
- What was the team able to do to improve the application because of the review?
- What problems did the team fix before they hit in production?

## **5. Interview your list of credible sources.**

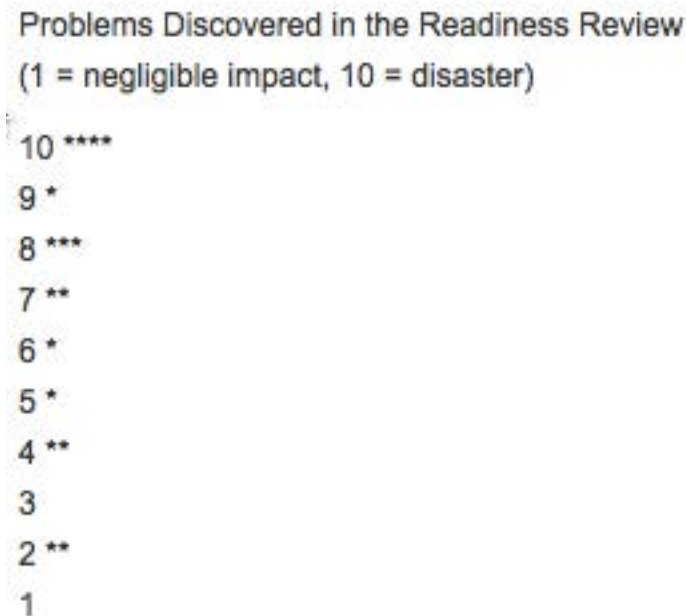
Keep your interviews short, and record responses carefully. Make sure to account for all the people on the "credible sources" list, even if you were unable to interview them. Otherwise, your manager may assume you were selective in your interviews to bias the case in your favor.

## **6. Summarize and present the results.**

Write a summary report no longer than one page. Account for all the people on your credible list, even if for some reason you didn't interview them. Be sure not to omit negative results. Chances are good that your boss will learn of the negative result anyway, and if she hears it from someone else, your credibility is dead. If you show the negative results, it telegraphs that your case is strong. Explain the

## Subjective Impact Analysis

negative results, but don't dismiss them or argue them away. If the person you are hoping to influence feels the person as credible, and it won't help to tell her otherwise.



Have the detailed data at hand so you can go over the details if the person you want to influence asks for them.

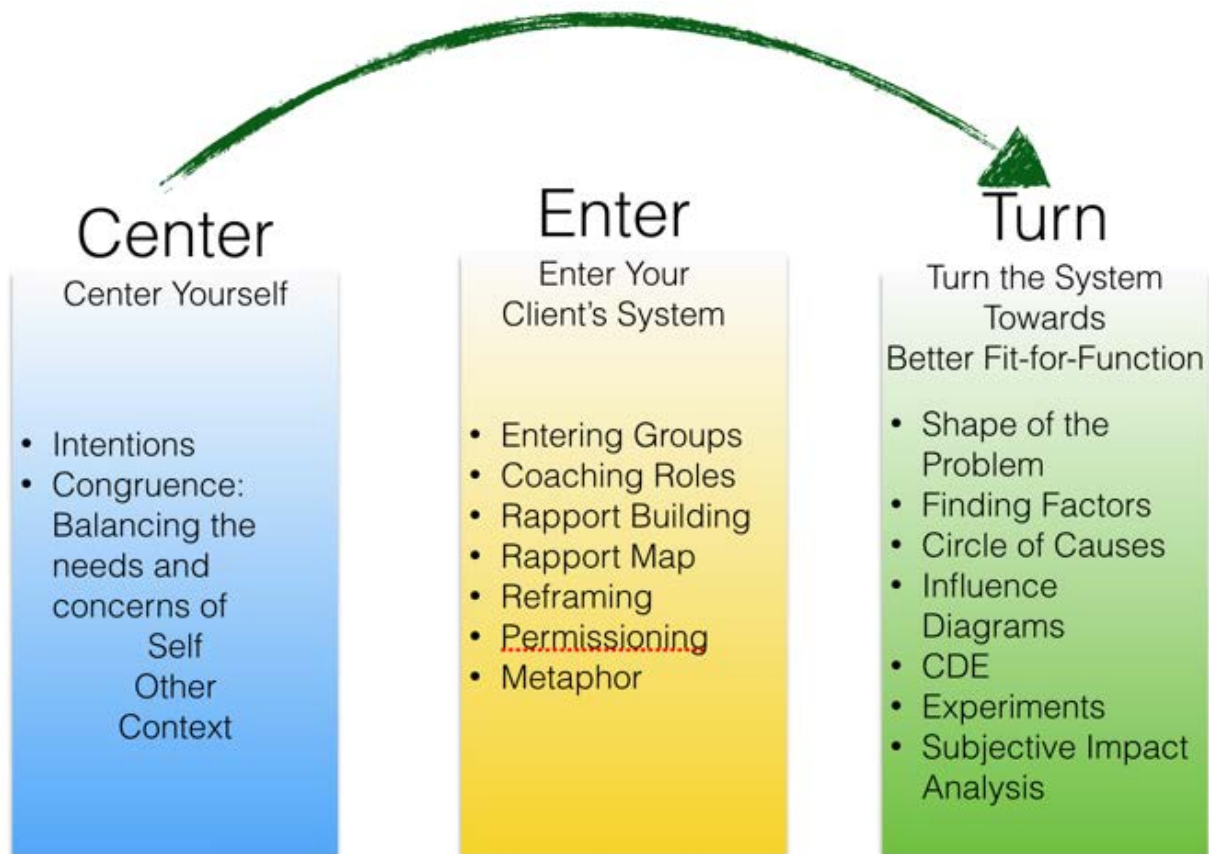
In the example above, interviewees were asked to rate the biggest problem found in a pre-production turnover meeting. Sixteen people identified the single biggest problem found in the meeting and then rated the impact of that problem on a scale of 1-10.

This represents each persons' assessment of only the biggest problems, so it's a subset of all the problems. Four people assessed the impact of the biggest problem at 10. One person assessed the impact of the biggest problem as 9, and so forth.

Other potential subjective impact measurements to consider:

If you don't have access to the person of influence or a group of people to interview, do your best to estimate subjective impacts with the facts and experience you have at hand. You can always refine your analysis at a later time.

# The Path



## Coaching Beyond the Team



*Expand the scope and value of your coaching*