# Co-Active Coaching Corporate Teleclass Series: *Learning Guide*

# Session 3: Balance in the Corporate Setting

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| *Objectives* |  | Objectives of this session are to:   * Deepen understanding of the principle of Balance in a corporate setting. * Identify default or limiting perspectives that are commonly present in organizations (individual Leaders, teams, and systems) * Build awareness of how the principle of Balance corresponds to powerful language commonly used in the field of corporate leadership and organization development. * Tackle Saboteurs around principle of Balance. * Using geography with Balance coaching in the corporate setting. * Identify strategies for applying the principle of Balance to teams and groups. |
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| Pre-Assignment |  | These tasks are suggested prior to coming to class:   1. What does “evoke transformation” mean in a corporate setting? 2. Review the Balance Coaching Formula and think about how you would use the formula with a corporate client that is not accustomed to experimenting in this way. What saboteurs come up? |

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| *Teleclass Tips* |  | To create the best learning space possible for our time together, please follow these guidelines   * Learning comes from participation and interaction of the group. Consider the teleclass as a learning experience that requires your focus and participation, rather than as something to be observed or listened to. * Jump into the learning laboratory with a willingness to experiment and fail --- you will learn more, and so will everyone else. * To ensure that the “tele-space” works well for everyone:   + Be present and refrain from multi-tasking (i.e. refrain from checking email or doing other activities).   + If there is background noise around you (e.g. barking dogs, running dishwashers, etc), please put your phone or device on “mute” while you are not speaking (and remember to unmute when you speak!)   + When you speak, start with you name so everyone knows who is speaking.   + Join the call from a space and with a connection that will be clear. If you call in from a cell phone from the highway, for example, it is likely that you connection might create static or interruption for others). |
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| *Limiting Perspectives in the Workplace* |  | Think about corporate settings or organizational teams of which you have been a part. In your experience, what “saboteurs” or limiting perspectives tend to show up in the workplace:  For individual leaders:  For teams:  Throughout an organization:  **What is the impact of those beliefs on performance?** |

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| *Case: Becky’s Stuck and Frustrated* |  | *Meet Becky, Associate Vice President of Retail Customer Service at a major mutual fund company. She is responsible for 140 telephone customer service representatives based in Dallas, Texas. She has a team of 10 Customer Support Managers reporting to her directly, and is working to build a new vision and strategy with her team for the coming year. You have been working with her for several months. Becky is very task-focused and takes a highly rational approach to problem solving --- she has voiced on various occasions that she does not like doing any of that “touchy-feely” stuff…*  *She arrives for her coaching session, sits down with an exasperated expression and says: “I have just had it! I couldn’t get my team moving if I strapped jet-powered engines to their sneakers… it is hopeless! They just will not budge. I think with this bunch it is going to be impossible to do what I want to do….”*  *“I can hear how aggravated you feel right now,” you say…. “Tell me more about what you want to accomplish…”*  *She responds… “Well, as you know we have got to come up with a renewed vision for next year that is backed up by a solid strategy. It just isn’t happening. I need to figure out how to get my team on board. It is like trying to drag 100 logs up a steep hill with this group….”* |
|  |  | What is the coaching topic?  What perspectives might be present? |

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| *Coaching Demo* |  | In the Coaching Demo, pay attention to evidence of the coach using the Balance Formula:   * Perspective * Choice * Co-Active Strategy * Commitment * Action     Exploration of geography in the coaching:  Skills used by the coach to create a safe space for exploration: |
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| *Evoking Transformation* |  | What does “evoking transformation” mean in a corporate setting when you think about Balance coaching?  Use this space for notes on other language that is frequently used to refer to concepts that are similar to “perspectives” in Balance Coaching.  Key resources for deepening your understanding of “transformative learning” in organizational settings:   * Immunity to Change by Robert Kegan * The Leadership Circle Profile and related articles by Bob Anderson – [www.theleadershipcircle.com](http://www.theleadershipcircle.com) * The Fifth Discipline Fieldguide by Peter Senge et. al. |
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