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

# Session 1: The Co-Active Coaching Model in Corporate Settings

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *Objectives* |  | Objectives of this session are to:   * Establish strong foundation for standing in Co-Active Coaching model in corporate settings. * Deepen understanding of how main components of the model apply specifically within corporate organizations. * Surface and explore common saboteur voices around Co-Active Coaching in organizations. * Foster specific examples of cornerstones, designed alliance, and principles of Co-Active Coaching. * Engage in powerful conversation about Co-Active Coaching in organizations. |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *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). |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Pre-Assignment |  | These activities are suggested prior to coming to the class:   1. Reflect on your experience working in organizational settings – successes, failures, opportunities and challenges. 2. Review the handout provided for the teleclass. Think about these questions:  * What does “evoke transformation” mean in an organization or to an organizational client? What do organizational clients MOST want? * What saboteurs show up around applying the Co-Active Coaching model in organizations?  1. Define your intention for the call. What do you want to get out of it? How do you want to show up on the call? |

|  |  |  |
| --- | --- | --- |
| *High Dream* |  | Corporate clients often have general goals or objectives in mind when they hire coaches. Sometimes, they may not have looked deeply into the question of “what do you MOST want to achieve as a result of coaching?” Put yourself in the shoes of the corporate client – the organization itself, and the specific client that might hire you. What do they MOST want? Make a list of all of the things that come to mind, and circle the ones that are truly “high dreams” or are most fulfilling. |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
|  |  | Who do you need to be as coach to have an impact on these desired outcomes? Where do you need to stand? What do you need to believe in? |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Saboteurs* |  | The Co-Active Coaching Model is a BOLD stance for coaching, and supports fostering transformative change. Often when we assume a bold approach and enter challenging environments, the most vocal saboteurs emerge. Which ones appear for you? Imagine the voices of:   * The skeptical corporate manager * An anxious nervous coach * A Human Resource Director that “knows it all”   What saboteur voices are present? |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
|  |  | If you allow yourself to be fully run by the saboteur, who do you become? How do you feel? How are you likely to behave? What are you committed to in this place? |
|  |  |  |

# Cornerstones

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *NCRW* |  | What is the particular meaning of this cornerstone in an organizational context? How might you respond to a skeptic in conversation about this cornerstone? |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Evoke Transformation* |  | What is the particular meaning of this cornerstone in an organizational context? How might you respond to a skeptic in conversation about this cornerstone? |
|  |  |  |
| *Coach the Whole Person* |  | What is the particular meaning of this cornerstone in an organizational context? How might you respond to a skeptic in conversation about this cornerstone? |
|  |  |  |
| *Dance in the Moment* |  | What is the particular meaning of this cornerstone in an organizational context? How might you respond to a skeptic in conversation about this cornerstone? |
|  |  |  |

# Designed Alliance

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *High Dreams* |  | What are the highest aspirations of your client? |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Who you must be* |  | What must be called forth in YOU to achieve those outcomes? What is needed from your client for you to bring that to the coaching relationship? |
|  |  |  |
| *Who must the client be?* |  | How must your client show up in the coaching process to produce those outcomes? What does your client need from you in order to show up that way? |
|  |  |  |
| *Empowering the Relationship* |  | If the relationship between you and your client were a powerful one, what would be present? What is specific to the corporate or organizational setting? |
|  |  |  |

# Session 2: Fulfillment in the Corporate Setting

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *Objectives* |  | Objectives of this session are to:   * Deepen understanding of the principle of fulfillment in a corporate setting. * Adapt visualization-type exercises (such as Captain and Crew) for a corporate setting. * Apply fulfillment concepts such as values, vision, and purpose in a corporate setting. * Tackle Saboteurs around principle of Fulfillment. |
|  |  |  |
| Pre-Assignment |  | The following are suggested prior to attending the class:   1. Think about the Fulfillment concepts of Purpose, Vision, Values, Saboteurs, Captain and Crew. How are these relevant to corporate work? 2. What saboteurs would impede you from going 100% with Fulfillment with a corporate client? |

|  |  |  |
| --- | --- | --- |
| *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). |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *High Dream* |  | How is each of these concepts from the principle of Fulfillment relevant in a corporate context?  ***Life Purpose***  ***Captain and Crew***  ***Values***  ***Vision***  ***Saboteur*** |

|  |  |  |
| --- | --- | --- |
| *Purpose (Life Purpose, Leader Purpose)* |  | Use this space to jot down notes from the visualization exercise in class. |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  | What statement of purpose comes from these insights? |

# Captain and Crew… and their Saboteurs

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *Captain and Crew* |  | Which crew members do you think are MOST relevant for corporate clients?   * Appreciator * Listener * The Intuitive One * The Curious One * The Self-Manager * The One Who Forwards the Action and Deepens the Learning   Others:  How can a structure like this be used with teams or groups? |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Saboteurs* |  | How do saboteur voices show up with corporate clients and in corporate settings?  For individual Leaders? For Teams? For the whole organization?  Notes on working with your own saboteurs as coach: |
|  |  |  |

# Session 3: Balance in the Corporate Setting

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *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. |
|  |  |  |
| 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? |

|  |  |  |
| --- | --- | --- |
| *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). |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *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?** |

|  |  |  |
| --- | --- | --- |
| *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? |

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *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: |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *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. |
|  |  |  |

# Session 4: Process Coaching in the Corporate Setting

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *Objectives* |  | Objectives of this session are to:   * Appreciate importance of emotion in a corporate setting, and relevance of “emotional presence” to corporate clients. * Understand competencies of “emotional intelligence” and relationship to Process Coaching. * Bust commonly held myths (saboteurs) regarding emotional expression in the workplace. * Deepen awareness of coach Saboteurs related to Process coaching and identify strategies to become freer of them. * Distinguish between Process Coaching and Therapy in the corporate setting. * Identify strategies for applying Process Coaching with teams or groups. |
|  |  |  |
| Pre-Assignment |  | These tasks are suggested prior to coming to class:   1. What are common beliefs about emotions in the workplace? 2. Inquiry: What is the value to you, personally, of having a space where you are fully free to be present, including with your emotions? |

|  |  |  |
| --- | --- | --- |
| *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). |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Myth-Busting* |  | Create a list of ALL of the objections that corporate clients might raise about Process Coaching – that is to say… beliefs they hold regarding the expression of emotion in the workplace, or coaching that evokes strong emotion.    Now, review the list and circle the ones that have the most energy or sting – or that would be most difficult for you to respond to.  Following the class exercise, note whatever insights you have about the impact on you as a coach when you buy-in to these beliefs. |

|  |  |  |
| --- | --- | --- |
| *Is it true?* |  | Use this space for notes from the discussion around the validity of the myths that surround emotion in the workplace.  Myth 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Critical Reflection:  Myth 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Critical Reflection:  Myth 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Critical Reflection:  Myth 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Critical Reflection: |

|  |  |  |
| --- | --- | --- |
|  |  |  |
| *Link to Cornerstones* |  | How do the cornerstones of the Co-Active Coaching model relate to Process Coaching in a corporate setting? Why are they especially important?    The Client is Naturally Creative Resourceful and Whole  Coach the Whole Person  Dance in the Moment  Evoke Transformation |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| *Captain and Crew* |  | Use the following space to record notes from your visualization using the Captain and Crew.  What is a perspective that you want to choose for this exercise?  When you stand fully in this perspective, who do you become as coach? How do you interact with your client?  Key resources for Process Coaching in corporate settings   * Emotional Intelligence and Primal Leadership by Daniel Goleman * Presence by Peter Senge |
|  |  |  |