

An approach to

COACHING

(& other really useful conversations)

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Glossary

A

Acceptable – an individual's very personal view of what's ok or not for them in a particular situation.

Action – what skilfully handling a Pivotal Situation looks, sounds and feels like.

B

Business as usual – an individual's typical way of handling things.

C

Compelling case for change – what an individual sees and hears in and/or feels about their context that convinces them that they need to begin their change journey.

Context – the environment in which an individual's change journey takes place.

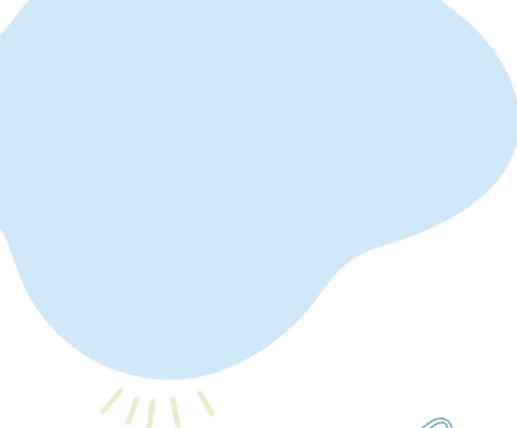
H

History – the legacy of an individual's experience on this planet.

I

Identity – the core of an individual's view of themselves. A combination of an individual's personality and their history that informs what, for them, is important, acceptable and/or possible.

Important – an individual's very personal view of what really matters and what doesn't in a particular situation.



J
Journey of change / change journey – the route from where an individual starts to the point where their outcomes become part of business as usual.

M
Moments of truth – particular moments in a Pivotal Situation where things could go either way. Where an individual's choices will help move in the right direction or not.

O
Outcomes – the way an individual wants/needs things to be at the end of their change journey.

P
Personality – the way of seeing and interacting with the world an individual was born with.

Pivotal Situations – the situations an individual will need to handle skilfully if they're going to get where they want/need to be.

Possible – what an individual believes they can do/knows how to do in a particular situation.

What is

COACHING?

These are *conversations* where one person supports or challenges another on their journey of change. They can be formal, pre-planned meetings but, just as easily, can be informal, ad hoc conversations triggered by a chance meeting or in response to an “in the moment” opportunity. These conversations can help people to:

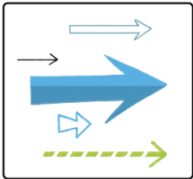
- Read the *context* they are or will be operating in.
- Become clear about the *outcomes* that matter to them and the organisation they work in.
- Make progress towards those *outcomes*.
- Manage themselves in the *Pivotal Situations* that enable those *outcomes*.
- Improve their performance in those situations.
- Overcome obstacles.
- Build, maintain or mend relationships.
- Sustain a level of performance over time.
- Change as their context changes.
- Monitor and maintain personal wellbeing.

COPA explained:



Context is the landscape (organisational, physical, cultural, emotional etc.) an individual is operating in. This covers both a focus on the here and now and what's coming over the horizon. Somewhere in this landscape will be the compelling case for a change.

- What's going on in your world at the moment that's got (or needs) your attention?
- What can you see coming over the horizon that might need your attention?
- What, if anything, is keeping you awake at night?
- What are you seeing, hearing and feeling that tells you things might be changing?

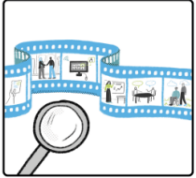


Outcomes are what needs to be happening in that landscape once the change has become 'just part of what we do around here'. This isn't so much about numbers, as it is about bringing the change to life through mindset and behaviour.

- What has to be different and what does that look, sound and feel like?
- What will your mindset be? How will you be different?
- Do you feel that it's part of your remit to make that happen?
- Do you genuinely feel that you could pull that off?
- Is that something that you really want?

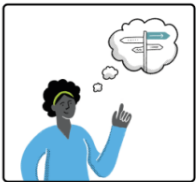


COPA explained:



Pivotal Situations are where an outcome happens. They can either be situations where progress can be made towards an outcome becoming normal or the situations where the outcome becomes real.

- Where will you be and who will you be with when you have the opportunity to make this outcome happen?
- What is it about situations like that that means you avoid them and/or makes you wary about them?
- What are the consequences of failing to get involved in situations?
- What might make it more likely that you will scan for and willingly get involved in situations like that?



Action is what needs to be done in order that those Pivotal Situations, and particularly the moments of truth within them, are managed skilfully and progress toward those outcomes is made.

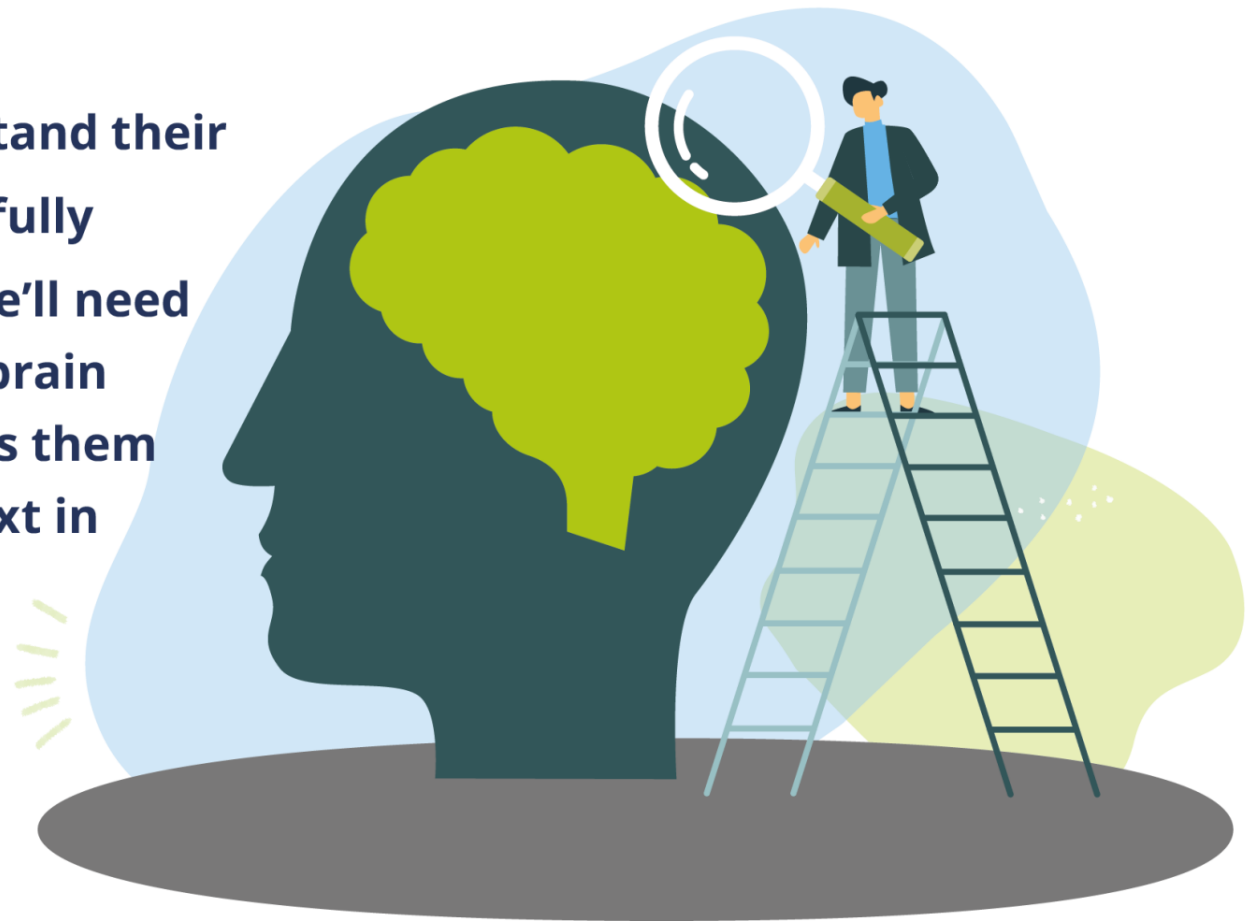
- Which version of you currently turns up in situations like that?
- Is that likely to help achieve your outcomes?
- Which alternative version of you could turn up?
- How close to your outcome would that get you?



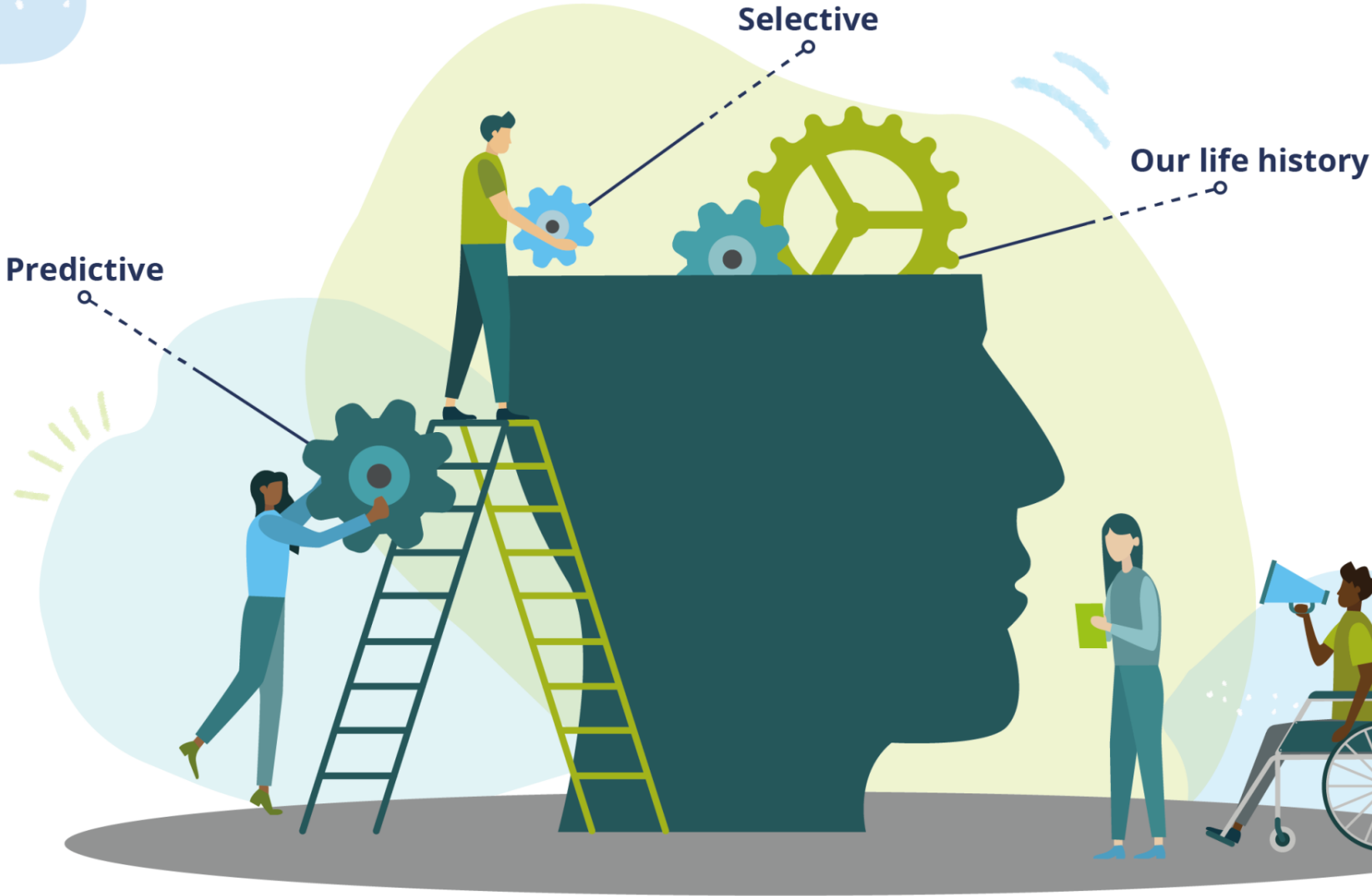


Our approach explores each of those elements through the lenses of what's personally *important* (useful), *acceptable* and/or *possible* for the people we coach.

If we're going to help people understand their *context*, commit to *outcomes* and skillfully manage their *Pivotal Situations*, we'll need to help them understand how their brain works and, in particular, how it helps them make decisions about what to do next in the moment.



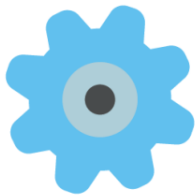
How our *brains* works:





Our brains are *predictive*:

- Our brains evolved many tens of thousands of years ago, when we were a relatively insignificant part of the ecosystem we lived in. We survived because of our ability to predict/anticipate when we might be at risk. That “foresight” meant we were alert and ready to respond when needed.



Our brains are *selective*:

- Our brains can only process a finite amount of “data” at any one time. They do that by:
 - Scanning for some things and simply ignoring others.
 - Using different operating modes:
 - “Fully focused”. The thing about being fully focused is that it’s hard work. If we had to work like that all of the time, our heads would explode! So, we reserve it for situations where:
 - We’re outside our comfort zone.
 - We’re not sure what’s going on.
 - We feel threatened.
 - There are negative consequences for us if we get it wrong or we want something badly enough for it to really matter.
 - “Auto-pilot”. Auto-pilot is easy. For that reason, we tend to operate in auto-pilot most of the time. When in this mode we:
 - Make lots of assumptions.
 - Follow the easiest paths.
 - Call on routine stuff we don’t have to think a lot about.



Our brains draw exclusively on our *life history*:

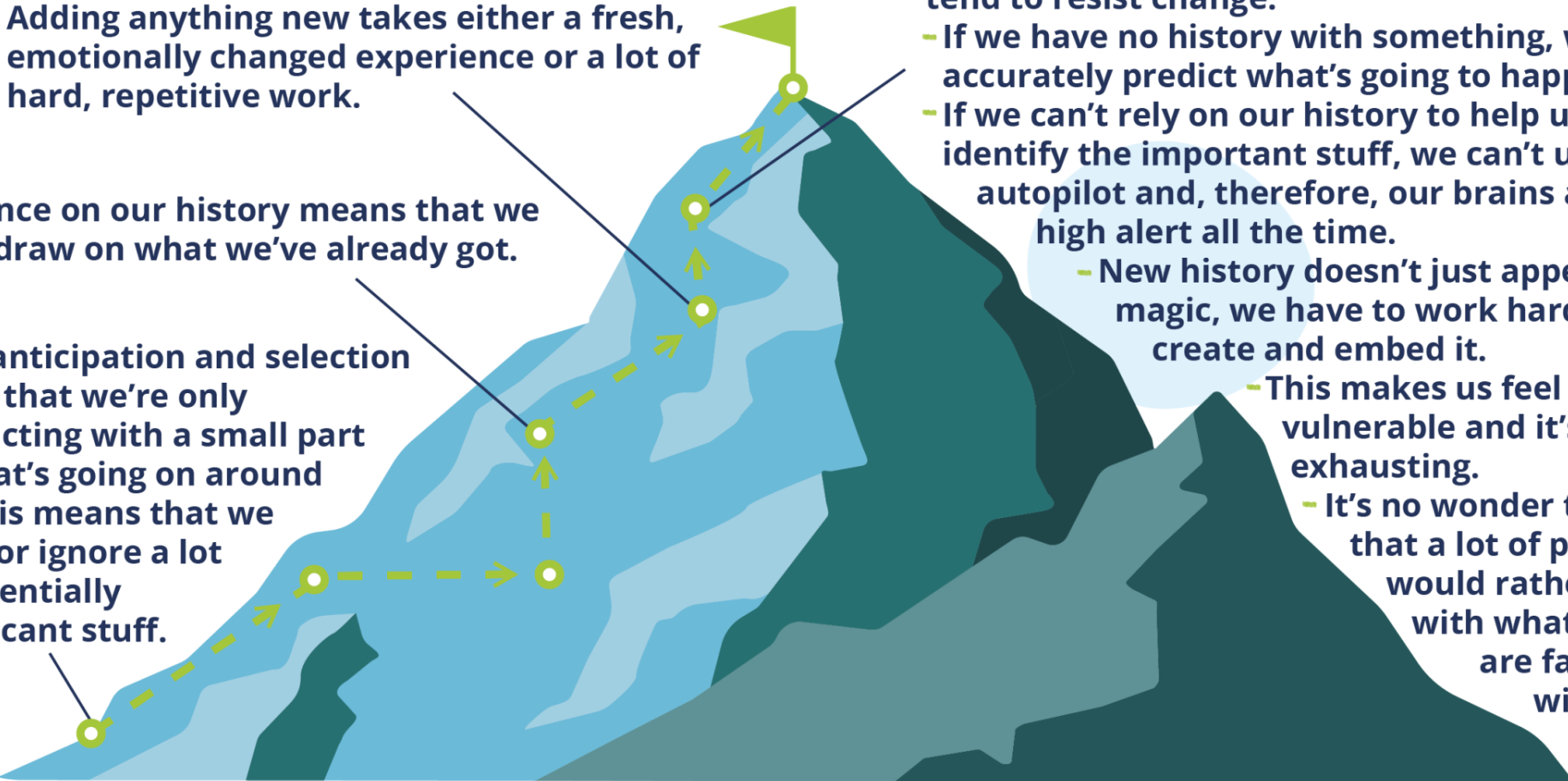
- In the moment, our brain draws on what's already embedded in it - the legacy of our life experience. It uses that legacy to make sense of stuff that's going on around us and predict what's likely to happen next. If our brains merely depended on things that we've experienced ourselves we'd be very exposed. It also, therefore, draws on things that we've read, watched happen or heard from people we've taken seriously.
- Sometimes we're confronted with something that we're not that familiar with. In situations like that, it's really difficult for us to know what to do with or to it. This is potentially quite dangerous. It makes us hesitate and, therefore, vulnerable. Our brains deal with this by filling in the gaps using stuff from our experience that's "close enough". Sometimes this works and sometimes it doesn't, but at least we keep moving!

Because no-one else can possibly have had the same life experience as us, the way we interact with our world has to be

uniquely personal.



What that means for the way we *navigate* our way through our world is:

- 
- Adding anything new takes either a fresh, emotionally charged experience or a lot of hard, repetitive work.
 - Reliance on our history means that we only draw on what we've already got.
 - Both anticipation and selection mean that we're only interacting with a small part of what's going on around us. This means that we miss, or ignore a lot of potentially significant stuff.
 - This, of course helps explain why most people tend to resist change:
 - If we have no history with something, we can't accurately predict what's going to happen next.
 - If we can't rely on our history to help us identify the important stuff, we can't use autopilot and, therefore, our brains are on high alert all the time.
 - New history doesn't just appear by magic, we have to work hard to create and embed it.
 - This makes us feel very vulnerable and it's exhausting.
 - It's no wonder then, that a lot of people would rather stick with what they are familiar with.

What that means for us as *coaches*:

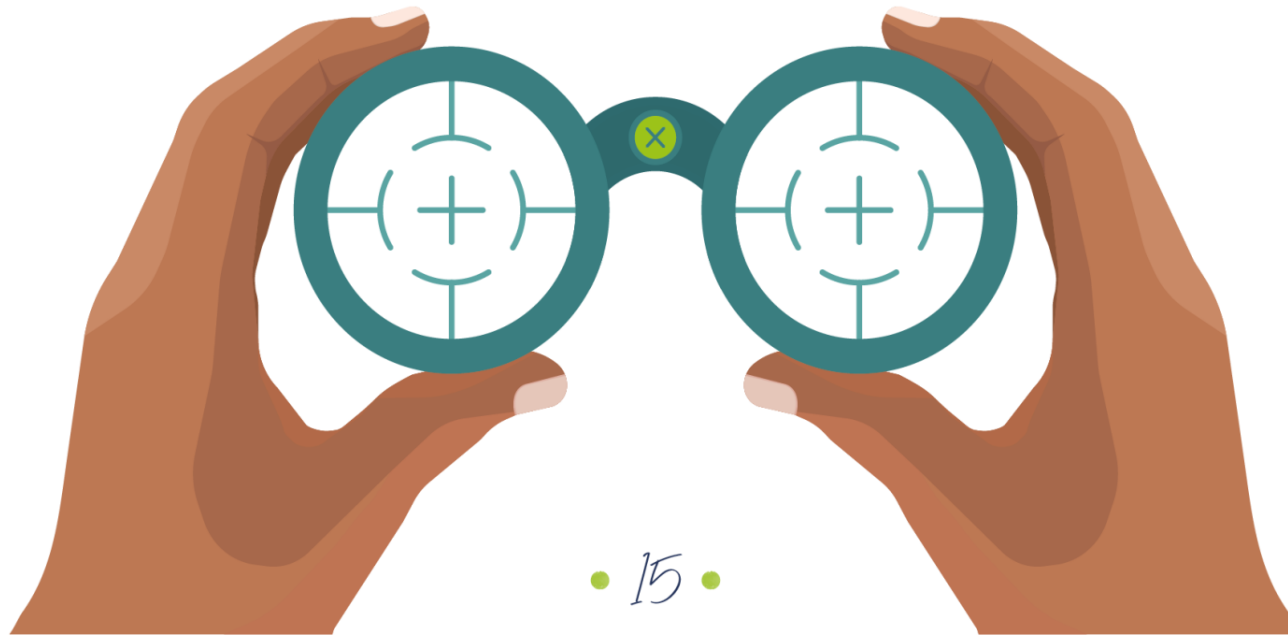
- We need to remember that it won't be us doing things differently and, if any change does happen, we won't be there if it does.
 - Just telling people what they ought to do doesn't work. That advice comes from our history, not theirs.
 - We can't assume that, because someone seems to agree to do something different, they'll automatically do it.
 - It takes time to create the new history needed to inform new predictions and priorities. One conversation rarely does it.
- So, our job is to equip the people we coach to manage themselves 'in the moment', in ways that work for them and deliver what they want/need.



At the core of our approach to coaching is this four stage behavioural decision-making process:

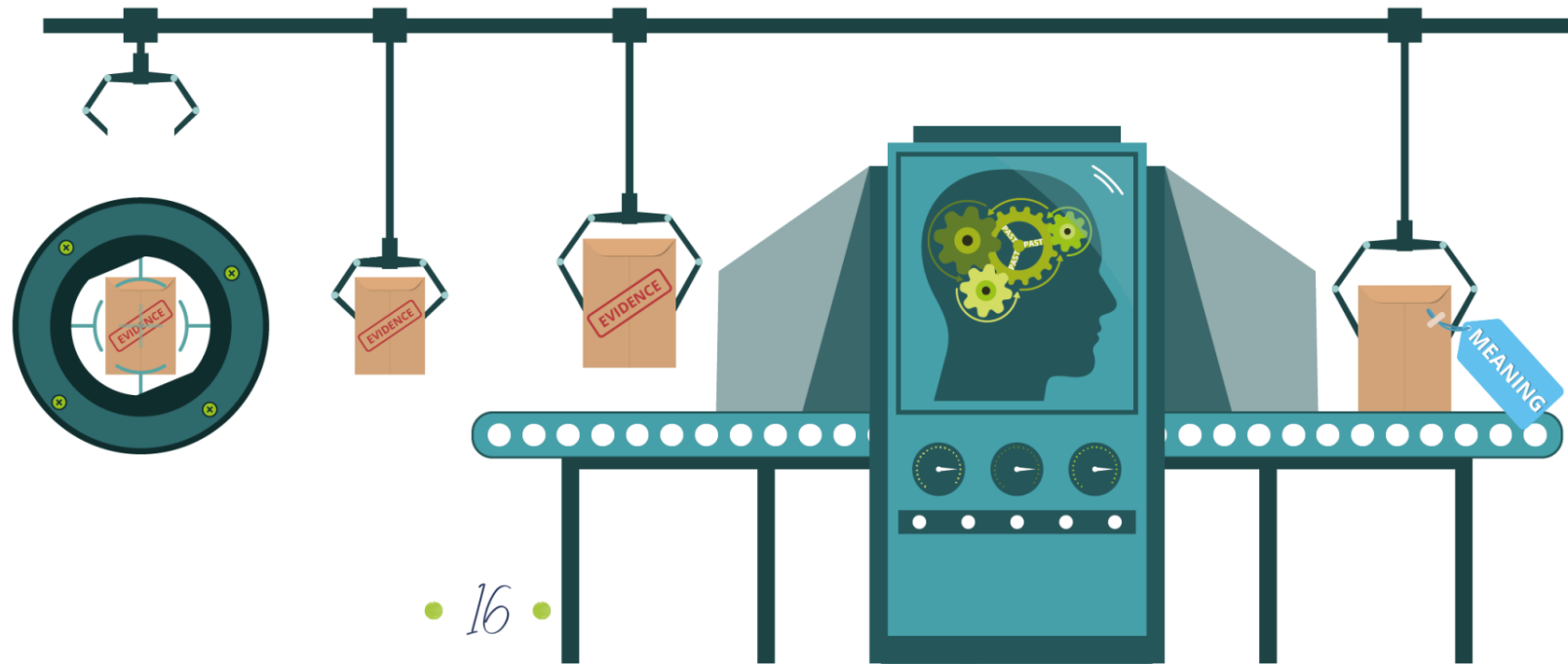
"Scanning"

- This is where our brains begin their work. It's absolutely fundamental to understanding and then controlling the way we make behavioural decisions.
- The key things we need to know about scanning are:
 - We scan for things our history tells us will probably be there and ignore other stuff.
 - We mostly scan in auto-pilot, only using full focus when we absolutely have to.
 - All our brains need is a fragment of evidence that confirms our predictions.
 - Even if we're wrong, we'll stick with those tried and trusted predictions until there's real reason to change.
 - Things will surprise us occasionally because we weren't scanning for them.
 - We can, of course, deal with those surprises, but we'll probably be tentative and, therefore, at a disadvantage in the moment.



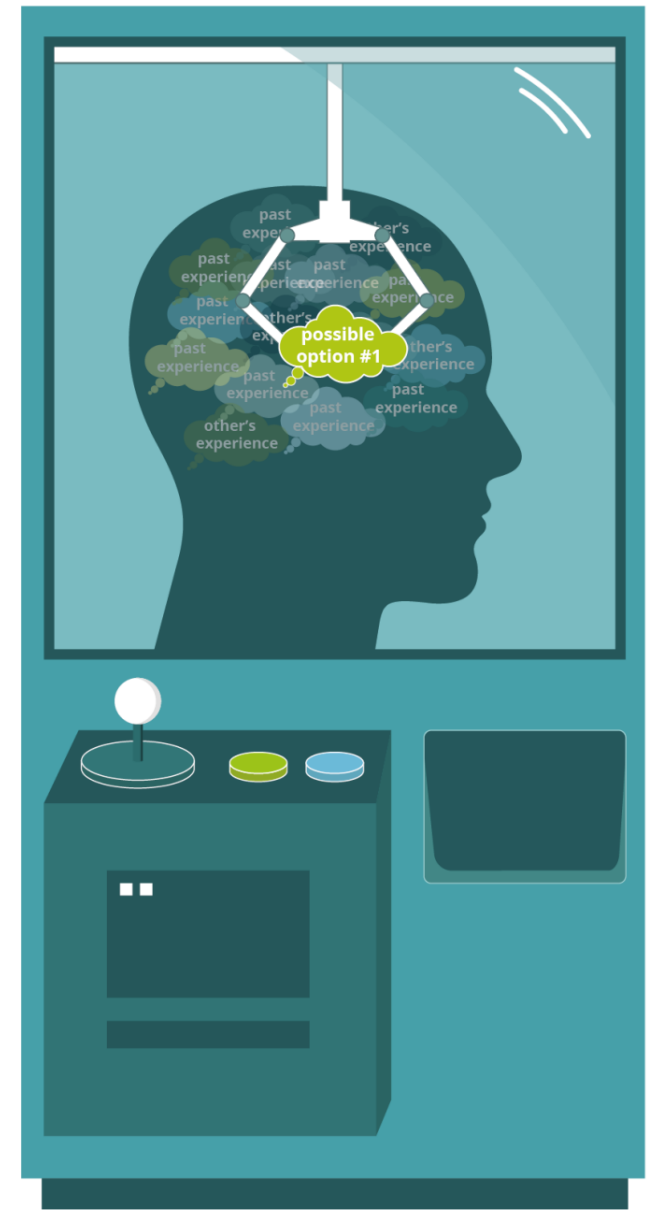
"Meaning making"

- As soon as our brains find the fragment of evidence our senses have been scanning for, they must give it meaning.
- Meaning making is about us getting as familiar as possible, as quickly as possible with the situation we find ourselves in.
- It's informed by echoes of our past encounters with similar situations and the more meanings are confirmed by subsequent experience, the more they become our go-to meanings.
- These questions may help illustrate what's going on when we're making meaning:
 - What's going on here?
 - What's in it for me?
 - What's likely to happen to me?
 - What are the rules (unspoken or spoken)?
 - How comfortable do I feel in this situation?
 - How much power do I have?
 - Am I going to be able to handle it?
 - Who will I allow myself to be in this situation?
 - Should I get involved or steer clear?



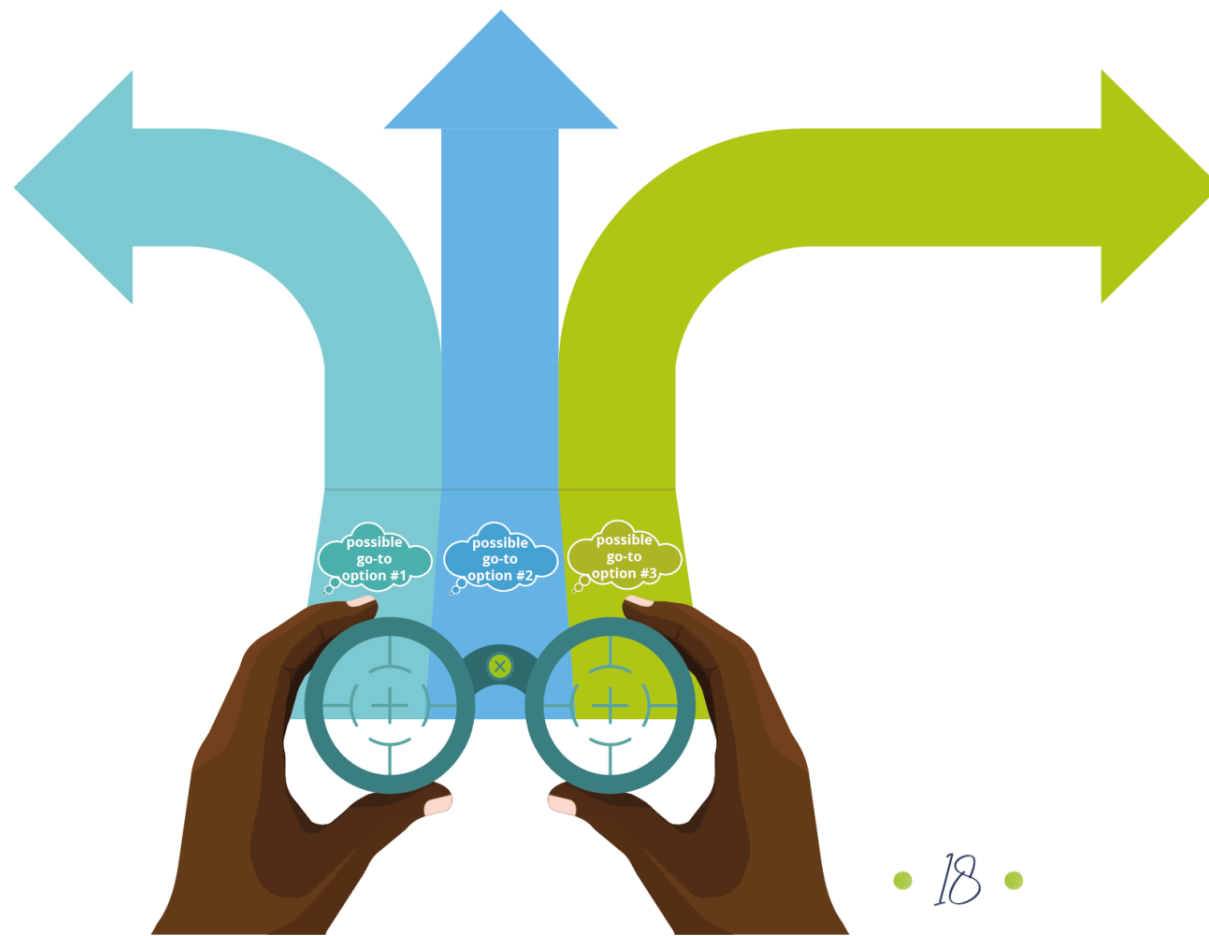
"Consideration"

- If we had to piece together a response to every situation we encountered from scratch, our heads would explode. Instead, we will tend to go for the easiest option available and, as with meaning making, that means considering go-to options from our repertoire.
- So, consideration is an internal dialogue that goes something like this; "Oh, it's one of those, so these options are worth considering".
- Once we've recognised a situation, our brains make behavioural options available, BUT (and this is a huge but) only those that have worked for us (or we've seen or heard have worked for others) in the past.
- "Worked", of course, can mean different things. It might mean getting involved and getting a positive result, but it could as easily mean finding the quickest exit possible.
- So, in summary the options we consider in any given situation are those that:
 - Our brains associates with situations like that.
 - Are already in place somewhere in the neural pathways of our brains.
 - Have worked for us or others in the past.



"Action"

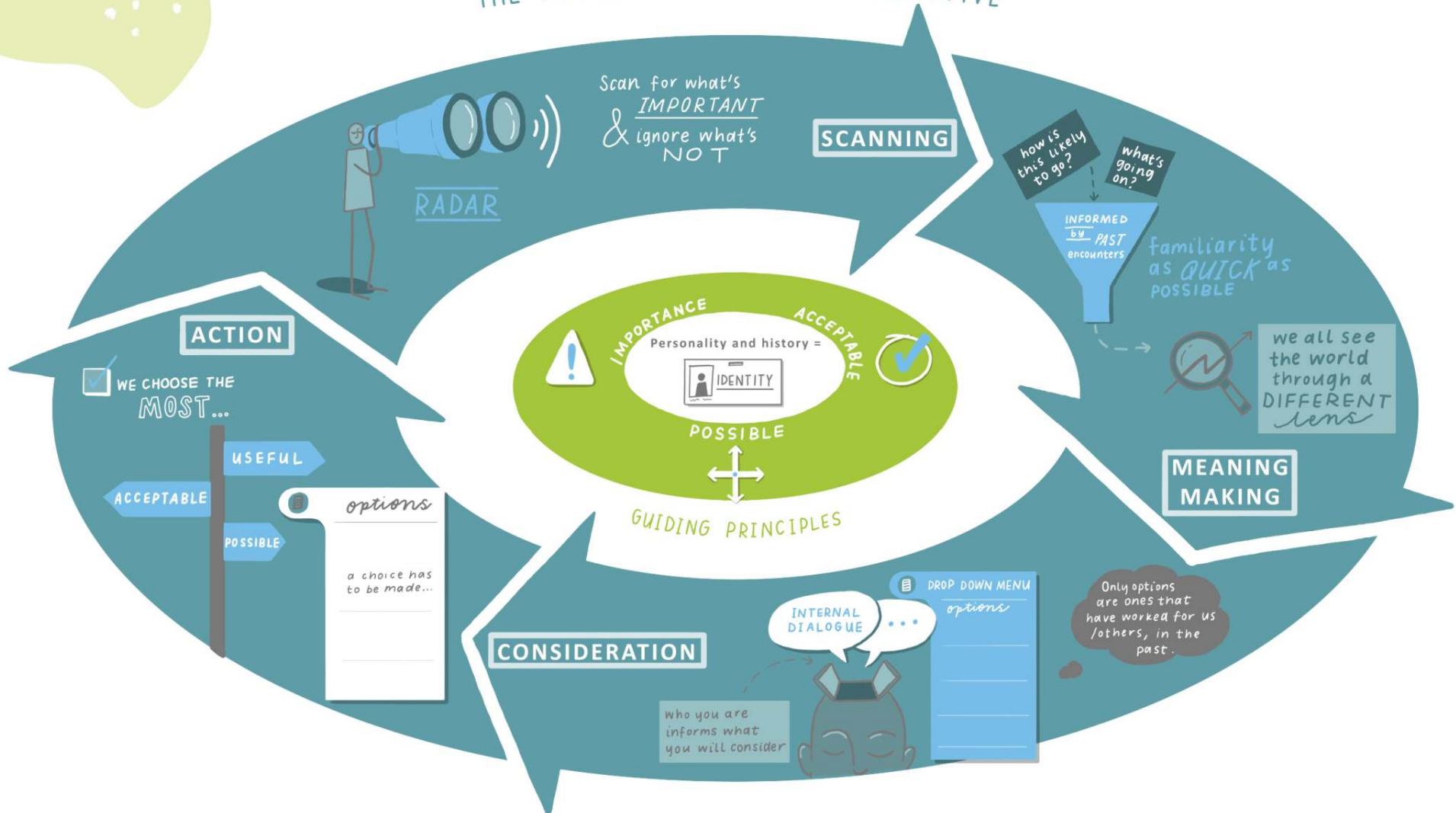
- We can only use one of those go-to options and so a choice has to be made. We make our decisions based on how our history predicts an option will play out. Ultimately, the option chosen is the one that we predict will give us the best outcome in the circumstances.



OBDMM

The Odyssey Behavioural Decision-making Model summarises that four stage process:

THE PROCESS IS PREDICTIVE & SELECTIVE



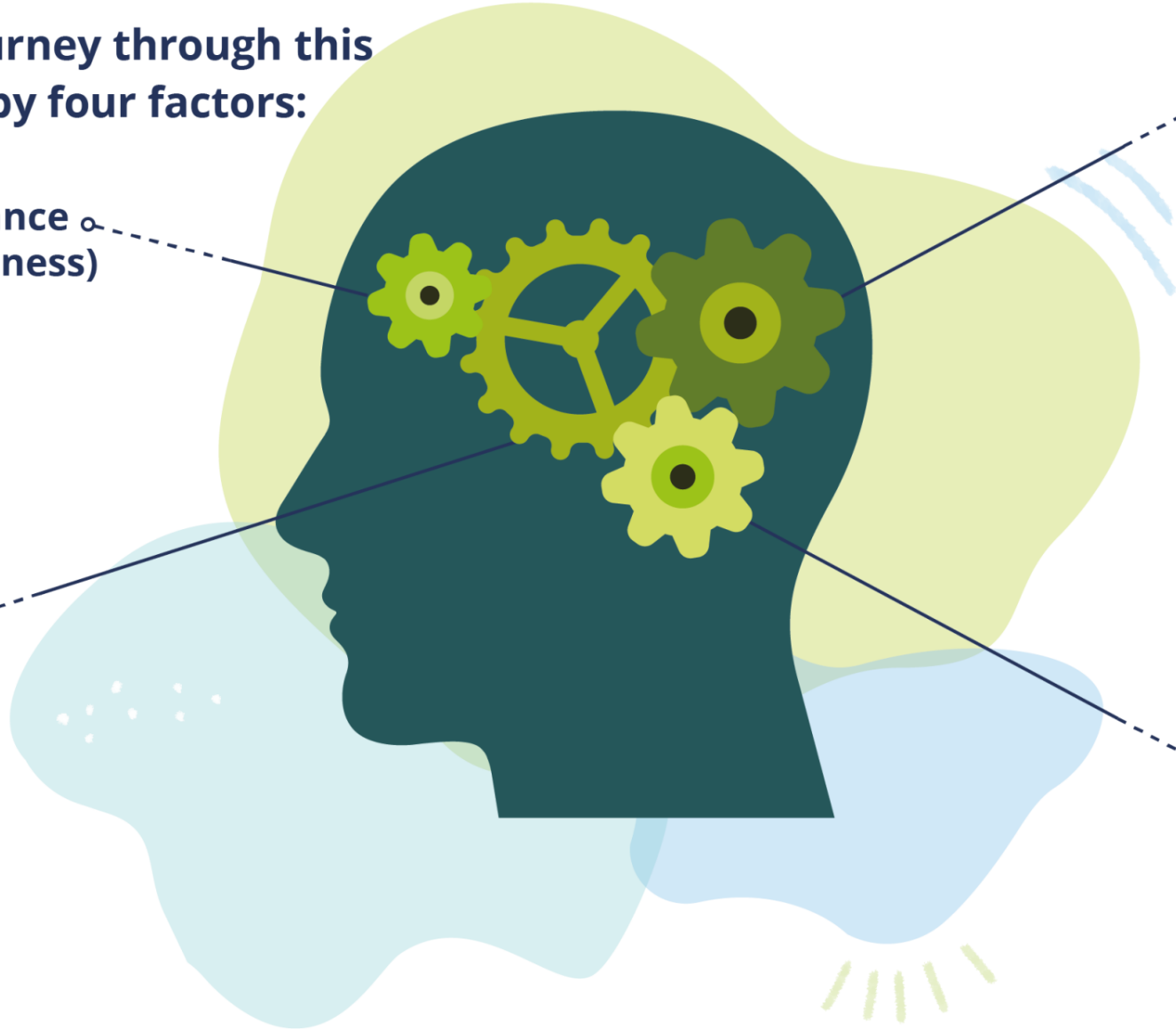
Our personal journey through this process is *driven* by four factors:

Importance
(or usefulness)

Acceptability

Identity

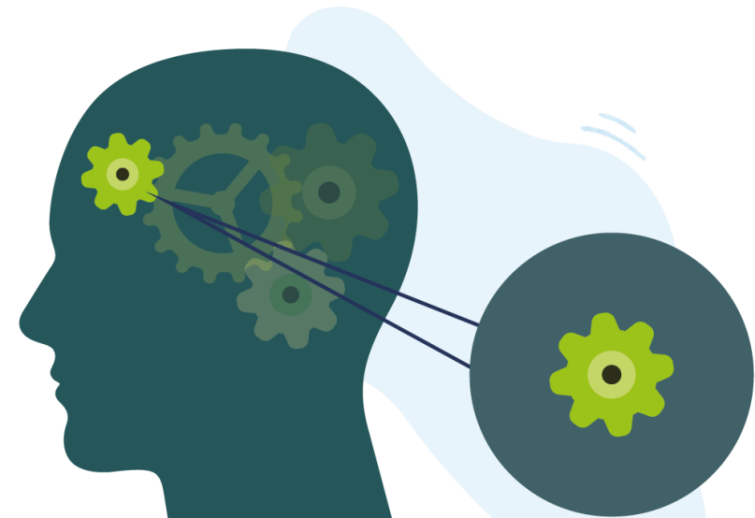
Possibility





Identity

- We've already introduced the importance of our history, but here's a recap:
 - It's the sum of our life experience; not just what's happened to us but also what we've seen and heard happen around us. It's not like a video recording however, it's the full emotional experience and it's that emotional legacy that has the most influence on our behaviour.
- Our personality, the way we're predisposed to view and engage with the world, is also a key part of our identity.



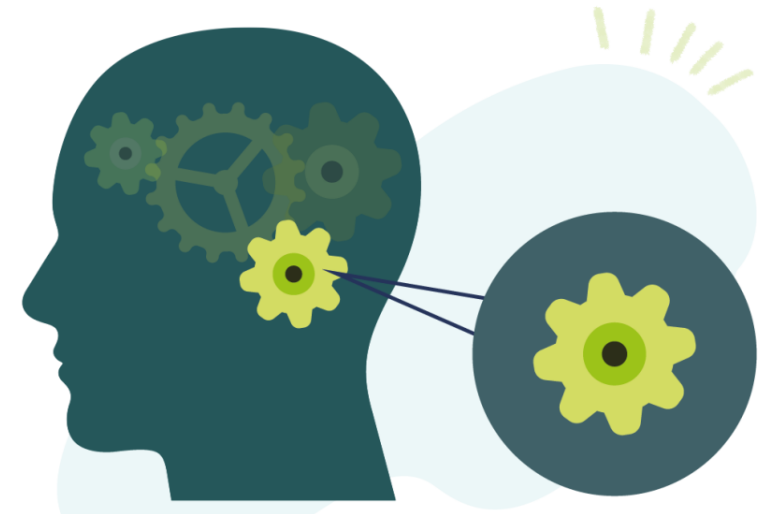
Importance (or usefulness)

- Think; "What's in it for me?" here. It's about what really matters to us, in terms of our goals and priorities; those things that define what we want from life and to achieve in it. Usefulness is about the question; "Does this situation, or action, have the potential to get me what I really want, or not?"



Acceptability

- This is essentially about judgements of right and wrong, okay or not okay and, of course, acceptable or unacceptable. We all, with some particular exceptions, predict and take notice of what others will think of our actions and how our actions will measure up against our own very personal values and beliefs.
- Those predictions influence the roles we allow ourselves to play and the actions we allow ourselves to take.



Possibility

- Essentially, possibility boils down to the question; “can I do this (or not)?”. This is not, however, an objective judgement, so actually, the question should be; “do I believe (have confidence) that I can do this?”.



Together, what's *important* and *acceptable* to us and *possible* for us, form the guiding principles that inform our scanning, meaning making, consideration and action. It's important to recognise the significance of emotion here. What gives those guiding principles the power to steer our behaviour are the feelings of excitement, embarrassment and nervousness that bring them to life and all of the emotional triggers that we're not even aware of.

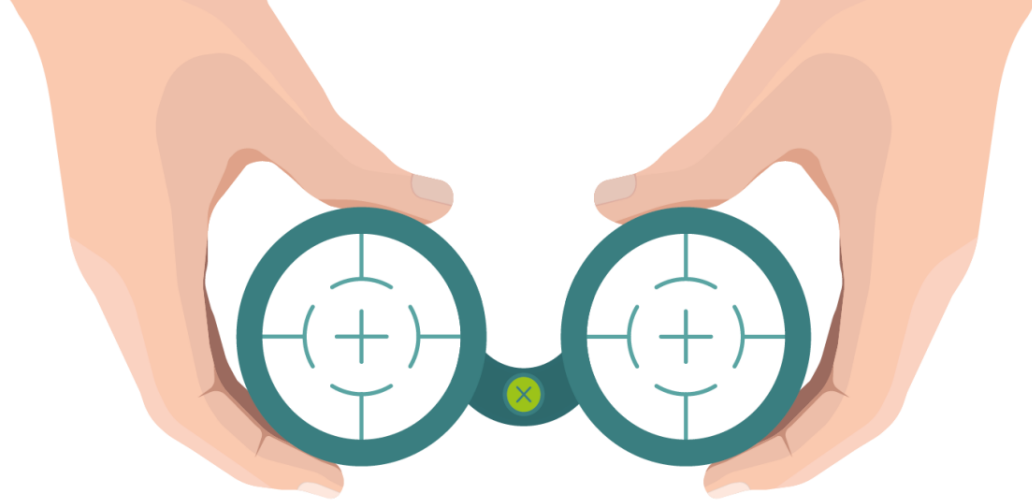
COPA

Our Approach to Coaching in more detail:

Context

One of the things that we're clear about as coaches is that no one puts in the effort needed to change the way they do things unless they REALLY want to. That means, as we understand it, that a new way of doing things has to become more important, acceptable or possible than their old way of doing things. That makes the search for what's important, acceptable and possible to the people we coach absolutely fundamental in our work with them, and that work starts with an exploration of the world they live and work in - *their context*.

What emerges from that exploration can range from concerns about the impact of climate change, to the pressure to meet business objectives, to the overwhelming volume and complexity of the challenges they're facing, to the underperformance of one or more individuals.



What we're scanning for here is what's important, acceptable and possible enough to them to justify spending time exploring it further.

For example, dealing with the underperformance of an individual may seem important and entirely acceptable and possible to us, but we're not the ones who're going to have to confront it! Unlikely as it may seem, they might not see this as that big a deal. More likely, they may have other priorities, might not feel that they have the backing of the organisation to deal with it or may doubt themselves and their ability to handle the conversation(s) that would inevitably follow. Unless we spend time exploring how they think and feel about taking on that challenge, there's little prospect of them taking any meaningful action.

As our impact as *coaches* is a lot about the questions we ask, here are some context suggestions:

At the start of a coaching relationship, we'll spend a lot of time focusing on the context because, before you launch into the details, it's helpful to make sure that we're focusing on what's most important, acceptable and possible from *the individual's* perspective.

So, useful questions here might be:

- 🔍 "What's going on in your world at the moment that's got (or needs) your attention?"
- 🔍 "What's changed?"
- 🔍 "What are you seeing, hearing and feeling that tells you things might be changing?"
- 🔍 "What can you see coming over the horizon that might need your attention?"

You might then follow up with some questions about **I**mportance (I), **A**ceptability (A) and **P**ossibility (P) like:

- 🔍 "Why has that got your attention?" (I, A)
- 🔍 "What will you gain by tackling this?" (I, A)
- 🔍 "What are the consequences of not tackling it?" (I, A)
- 🔍 "Is that something you believe you can handle?" (A, P)
- 🔍 "How do you feel about tackling it?" (I, A, P)

In later conversations, we may spend less time on context. We may begin with something like:

- 🔍 "What's going on for you at the moment?"
- 🔍 "Has anything changed since we last spoke?"

If nothing has changed, we'll move on. If there's something new, and depending on its significance, we may spend some time exploring that change to see if a major rethink is required.





Of course, not everything in life flows neatly. Coaching relationships often start with an individual saying something like; “I need to be better at building relationships.”

Here, we might ask questions like:

- ❓ “Why is that important to you?”
- ❓ “What is that going to give you?”
- ❓ “What difference will that make in your world?”
- ❓ “What’s going on in your world that means that being better at building relationships will help you?”

What emerges from a guided exploration of an individual’s context are the things that they genuinely believe require their attention. Just to be clear, we’re not dismissing what’s important to the organisation an individual works within here, we’re just acknowledging the reality that, unless an individual has some personal motivation to deal with something, they’re unlikely to put the effort in required to fix it. Once that motivation is clear, we can move on to explore outcomes.

So, in simple terms, context is about the *why* of the coaching journey.





Outcomes

Once the things that are important enough to focus on are clear, attention can shift to helping the individual we're coaching work on the *what* of the coaching journey.

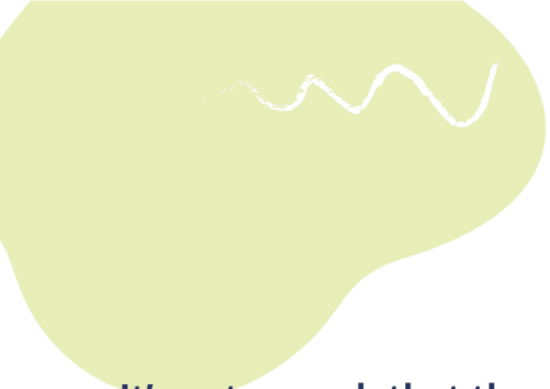
Here we're talking about how things will be once they've taken action. It's tempting here to focus on "the numbers" - % growth, "throughput" or other measures of performance - and sometimes that's appropriate, but that's not necessarily what we have in mind when we talk about outcomes. To borrow some language from the world of sport, we believe that if we help the individual focus on performance (how they are in the moment), the results will look after themselves. So, for us, working on outcomes is about bringing the future to life, so that an individual can recognise it when they see it.



There are various routes into an exploration of "how things/you will be" once an outcome like greater engagement or commitment is *normal*.

- One option is to ask an individual to imagine that they're making a "fly on the wall" documentary film and to think about scenes that would be filmed and what would be going on in those situations. What, for example, if engagement or positive commitment were normal in their world, would it look and sound like?
- This technique also creates a neat route into exploring what we call *Pivotal Situations*.






It's not enough that the person we're coaching agrees that the scenes we've brought to life are "a good idea", they have to own them. That means that they need to pass the importance, acceptability and possibility test. There's a big difference, of course, between a scene that an individual can envisage and one that they can live in and with.



Once we have some "draft" outcomes, we need to stress test them using questions like:

- 
- ❓ "Is that something that you really want?"
 - ❓ "If you imagine yourself being in a situation like that, how do you feel?"
 - ❓ "Do you feel that it's part of your remit to make that happen?"
 - ❓ "Do you genuinely feel that you could pull that off?"
 - ❓ "What is achieving that outcome going to give you?"
 - ❓ "Is it worth it for you?"

Pivotal Situations

All behaviour is situational. We know from our own experience that we can be funny and outgoing in some situations but more serious and reserved in others. We also know that, while people are happy to share their thoughts in some situations, there will be others where they are more cautious.

So, once an individual is clear about their outcomes, it's important to explore *when* and *where* they'll have the opportunity to bring them to life. We call those opportunities Pivotal Situations because, if the individual gets them right, they'll have at least moved closer to the outcome they're looking for, if they haven't yet reached it.

It's also important to explore Pivotal Situations with the individuals that we coach because, if we want them to get involved in those situations, we need to help them recognise what they look and sound like. Without that clarity, what are they going to scan for?

The question we use as a lead in to exploring Pivotal Situations is:

- ① "Where will you be and who will you be with when you have the opportunity to make this outcome happen (or screw it up)?"





This is where the making of a “fly on the wall” documentary comes in. Here, the question might be:

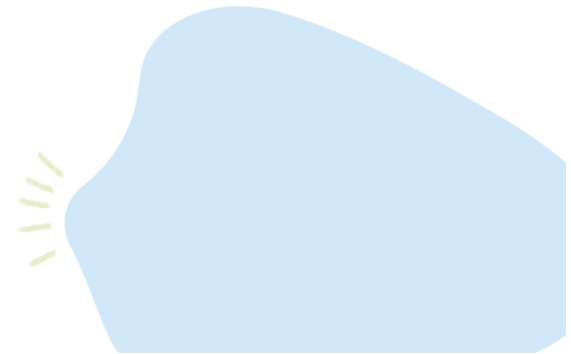
❓ “If you’re in a production meeting, building a ‘storyboard’ that shows the scenes you’re going to film, what scenes would you focus on? Those scenes would either show you on the journey or the *“new normal”*, when the outcome has become part of the way things are around here.”

Once those situations are clear, attention can shift to an individual’s relationship with them. Our primary focus here is to explore (and increase) the likelihood that an individual will actively scan for such situations and then willingly get involved.



Once again, questions such as these are a useful route into exploring what an individual thinks and how they feel about a particular situation. Some focus on importance (I), some on acceptability (A), some on possibility (P) and some on all three:

- ❓ “When you think about being in a situation like that, how do you feel?” (I, A, P)
- ❓ “What happens when a situation like that comes up - do you miss them, ignore them, actively avoid them or willingly approach them?” (I, A, P)
- ❓ “How likely are you to get the thing you want if you don't get involved with situations like that?” (I)
- ❓ “What are the consequences of failing to get involved in situations like that?” (I, A)
- ❓ “What might make it more likely that you will scan for and willingly get involved in situations like that?” (I, A, P)
- ❓ “What is it about situations like that that means you avoid them/makes you wary about them?” (I, A, P)



Moments of truth

Once the individual we're coaching is clear about the Pivotal Situations they need to get right, we can then move on to help them focus on what we call *moments of truth*. These are moments during a Pivotal Situation when things can go either way.

For example, an individual comes into a Pivotal Situation full of good intentions around respectful dialogue but is irritated when someone "criticises" an idea they put forward or makes a remark that makes absolutely no sense. In that *moment of truth*, their good intentions are hanging by a thread. If they allow that meaning (irritation is an emotion and that's typically what 'meaning' is) to trigger the behaviour they'd promised themselves they'd avoid (a pointed put down or aggressive dismissal for example) then nothing changes.

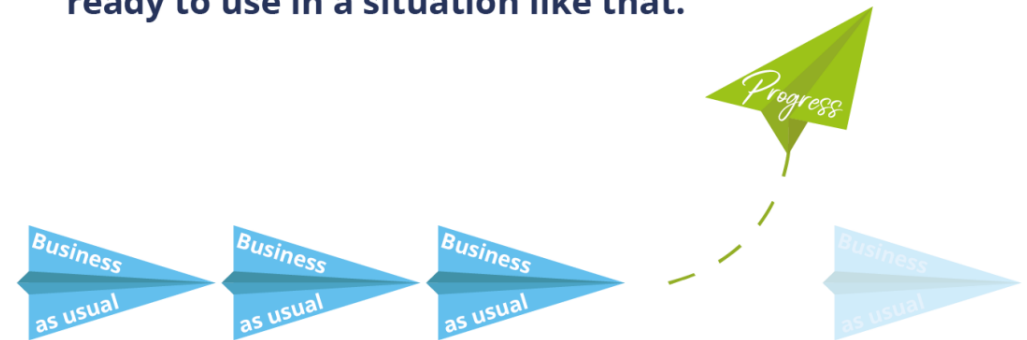
If, however, they can exercise some self control, then there's a chance that they might consider and then do something more likely to give them what they say they want (asking some questions designed to find out more about the other person's perspective and then genuinely listening to their answers).

GOOD INTENTIONS

Managing moments of truth requires two things - *self-awareness* and then *self-control*. Self-awareness is about understanding ourselves and why we do what we do. Self-control is about the ability *and willingness* to do something different.

This means:

- Paying enough attention to ourselves in the moment that we can spot ourselves about to do "business as usual".
- Understanding why we're going to that, for example, irritated place.
- Caring enough (because it's important to be respectful or unacceptable to be disrespectful) to want to do something different.
- Having useful, acceptable and possible options ready to use in a situation like that.



Action

Once Pivotal Situations and moments of truth are clear and we've increased the likelihood that the individual we're coaching will get involved, we can then shift our focus to exploring *how* they might turn up in those Pivotal Situations, handle those moments of truth and get a good outcome.



The focus here is not on what we or someone else might do. Instead, it has to be firmly on what the individual we're coaching is prepared to do. So, the emphasis has to be on options that are useful, acceptable and possible enough for that individual to choose them over and above business as usual *when it matters most*.



We'd suggest starting with questions designed to reinforce the importance of change by focusing on how an individual handles Pivotal Situations now. This is because, unless they come to doubt the value of business as usual, it's unlikely that they will be motivated enough to put in the effort needed to change. To do this we might start with:

- ❓ "Which version of you currently turns up in situations like that?"
- ❓ "How does that mean you tend to behave?"
- ❓ "Where does that get you?"
- ❓ "Is that likely to help achieve your outcomes?"

If the answer to the last question is "*no*", we have permission to explore how they might be different in order to get what they want/need. We can then shift the focus to questions like:

- ❓ "Which alternative version of you could turn up?"
- ❓ "What options would that open up for you?"
- ❓ "How useful, acceptable or possible do you feel those options would be for you?"
- ❓ "What would doing those things give you?"
- ❓ "How close to your outcome would doing those things get you?"
- ❓ "How likely are you to behave like that?"

Don't forget, our focus needs to be on the moments of truth *within* that situation, when a productive outcome hangs in the balance.

Identity and self-awareness

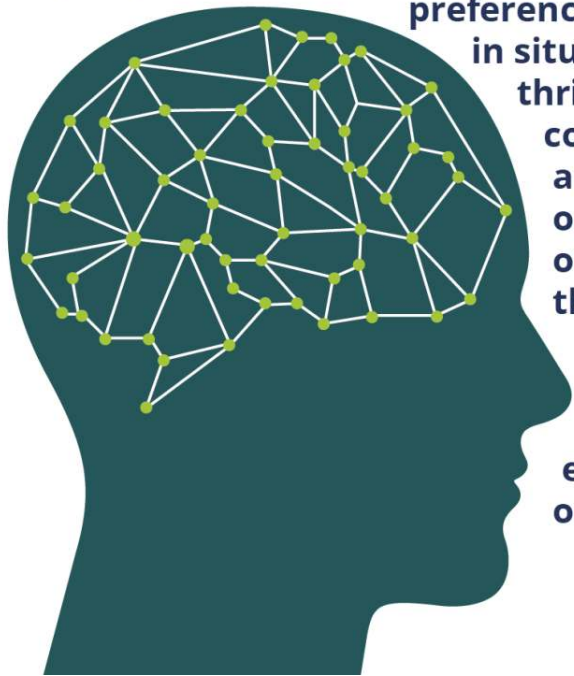
The Scanning, Meaning Making, Consideration and Action model helps us and the people we coach understand what's going on in the moment. That model, however, only describes what's going on in all our brains. If we're going to really help someone manage their Pivotal Situations and the moments of truth within them, however, we'll need to make it personal. We'll need to explore with them what's important and acceptable *to* and possible *for them* in those situations and moments. Each individual's unique answers to those questions is informed by their *identity*. The self-awareness that comes from an understanding of that *identity* helps them answer questions like; "which version of you tends to turn up in a situation like that?". It also helps them exercise the conscious self-control that we believe is the key to an individual's ability to actively manage their behaviour in the moment.



To us, identity is about two things: *history* and *personality*.

Personality is the way we're wired, our innate characteristics that combine to inform how we think and feel about ourselves and others and how we interact with the world around us. The advantage of personality is that a lot of clever people over many years have invested a lot of time and effort into exploring and codifying those characteristics. For example, most of us are familiar with the twin concepts of *introversion* and *extraversion*.

Introversion is a preference for sitting back and observing what's going on and then carefully weighing our options before ever sharing what's going on in our heads. In contrast, extraversion is a preference for actively engaging in situations; taking control, thriving off the connection with others and actively sharing our thinking with others. The existence of these clearly defined facets of personality gives us a much easier route into exploring this aspect of our identity.

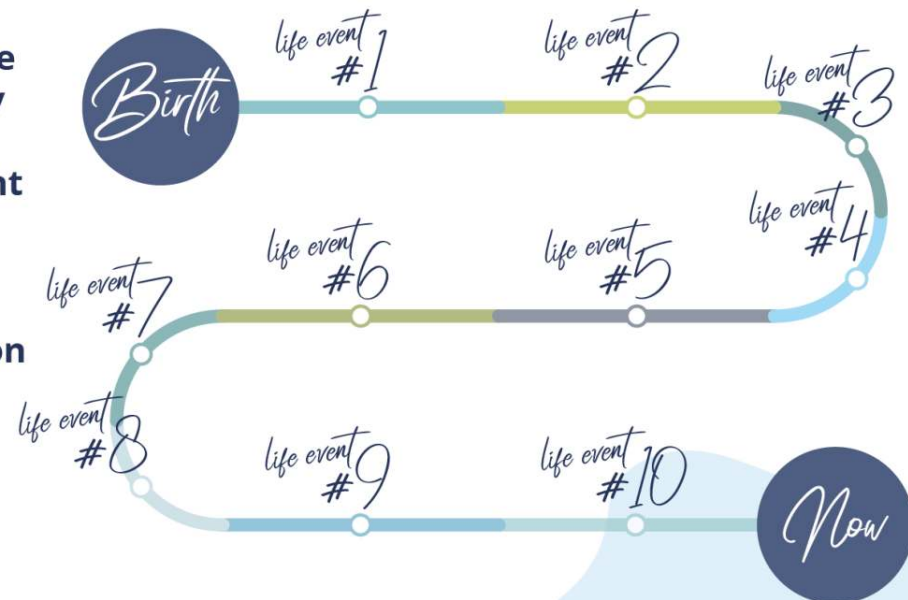


History, is the legacy of an individual's unique life experience. Over time, things happen to us and we see and hear about things happening to others. Those experiences (and particularly their emotional legacy) embed within us particular values and beliefs about life and the way it should (and shouldn't) be lived. That uniqueness makes history a much more complex territory to explore. That's not to say that there aren't routes into it. For example, this questionnaire provides an interesting start point:

idrlabs.com/human-values/test.php

It provides feedback in terms for our adherence to a number of universal values:

- Benevolence
- Universality
- Security
- Achievement
- Hedonism
- Stimulation
- Power
- Self-direction
- Tradition
- Conformity



In reality there isn't a black and white distinction between history and personality, and it's sometimes difficult to be sure where some facets of our identity come from. It's also the case that, despite their sophistication, no one personality/psychometric tool can ever reveal the full picture of an individual's identity.

An *example* from a personal perspective; one psychometric test suggests I'm a pretty flexible person. Whether this is an inherent personality trait or the legacy of a childhood where I regularly found myself whisked off, without warning, to some residential centre in some far flung part of the UK is unclear. That tool also fails to identify that, while I'm flexible when it comes to things that emerge, I'm the complete opposite once I'm set on a particular path.

So, to us at least, it doesn't much matter where insights about identity come from. The main thing is that they're available to inform our conversations with people we're coaching and, more importantly, to inform their choices in Pivotal Situations and the moments of truth within them. To us, therefore, it makes sense to take a blended approach to the exploration of identity.



As a *coach*, you can use a number of tools to help people understand their identity. We should, however, recognise that there will be boundaries that the people we coach will feel uncomfortable about crossing. We should scan for and, of course, respect those boundaries.

When it comes to *history*, we can:

- Encourage the person we're coaching to complete this questionnaire (idrlabs.com/human-values/test.php) and then have a conversation with them about where those values came from.
- Ask the people we coach to consider some questions like:
 - ❓ "Who do you admire?"
 - ❓ "What inspires you to take action?"
 - ❓ "When do you feel most like yourself?"
 - ❓ "What do you allow yourself to do and what's off limits?"
 - ❓ "What do you believe about other people?"
- Share with them a list of beliefs and ask them to select those they identify with.
- Encourage someone we're coaching to explore their personal timeline in order to identify the source of the values and beliefs that continue to shape them.
- Somewhere along that line may well be the experience that helps explain their reticence to engage with a particular situation or behave in a particular way, when it matters most. The emotional imprint of that experience might explain why:
 - They scan for anything that looks, sounds or feels like that situation, so that they can avoid repeating that experience.
 - Behaving in a situation that reminds them of that experience, in a way that seems logical to us, but feels absolutely unacceptable to them.
 - On the back of a failure to handle a situation like that, it appears impossible for them, despite all evidence to the contrary.



- Values and beliefs aren't, however, just about things that have happened directly to an individual. Particularly as a child, they will have been a sponge, soaking up the words and actions of parents and other significant adults, and those words and actions will have laid down fundamental ideas (and feelings) about what's (un)important, (un)acceptable and (im)possible.
- Exploring someone's timeline can either be done as a stand alone, set piece exercise or, more likely, be prompted by the recognition that something is getting in the way of progress but what it is and where it came from is unclear.
- When we're exploring their values and beliefs, we're looking to help people explore why engaging with certain situations or behaving in particular ways in those situations is proving unimportant, unacceptable or impossible. It's important, however, to go beyond a list of values and beliefs to an exploration of where those values and beliefs come from. That's because it's the emotional legacy of that original experience/message that ultimately influences their behaviour in the moment. A good start point is asking questions like:
 - ❓ "Where does that value or belief come from?"
 - ❓ "Who told you that you shouldn't or couldn't go there or do that?"
 - ❓ "When was the first time you decided that you shouldn't or couldn't go there or do that?"

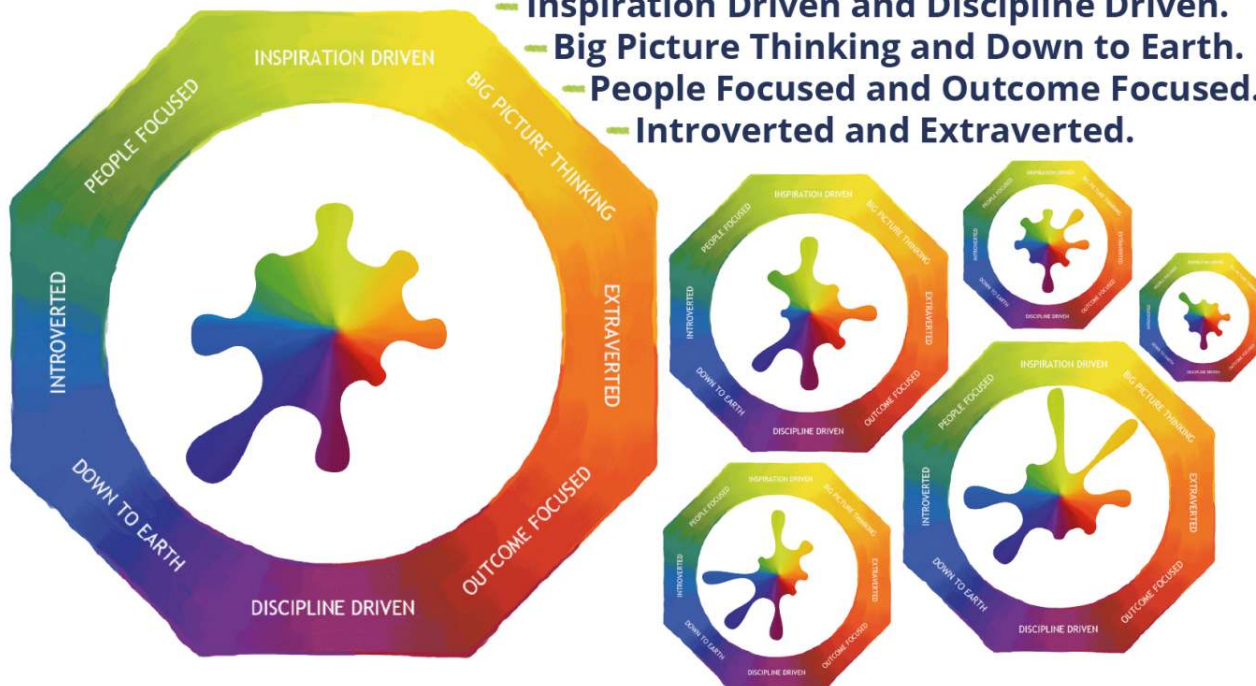


- When it comes to *personality* we can use a number of generally available psychometric questionnaires. Such tools are a great starting point, because they make it much easier to access key elements of the person we're working with identity than trying to unearth those same elements from their history. For that reason, we'd suggest to start with personality and then build on the understanding that provides when the opportunity to explore history comes up.

While MBTI© and Insights© are great options here, our current preferred option is Lumina Spark©. We are, however, looking to work with Insights. So, watch this space! If you don't have access to these tools, Lumina Learning's "Splash App" is a good way to start an exploration of personality.

- Lumina Spark has a framework defined by 4 pairs of opposite, but not mutually exclusive aspects. They are:

- Inspiration Driven and Discipline Driven.
- Big Picture Thinking and Down to Earth.
- People Focused and Outcome Focused.
- Introverted and Extraverted.



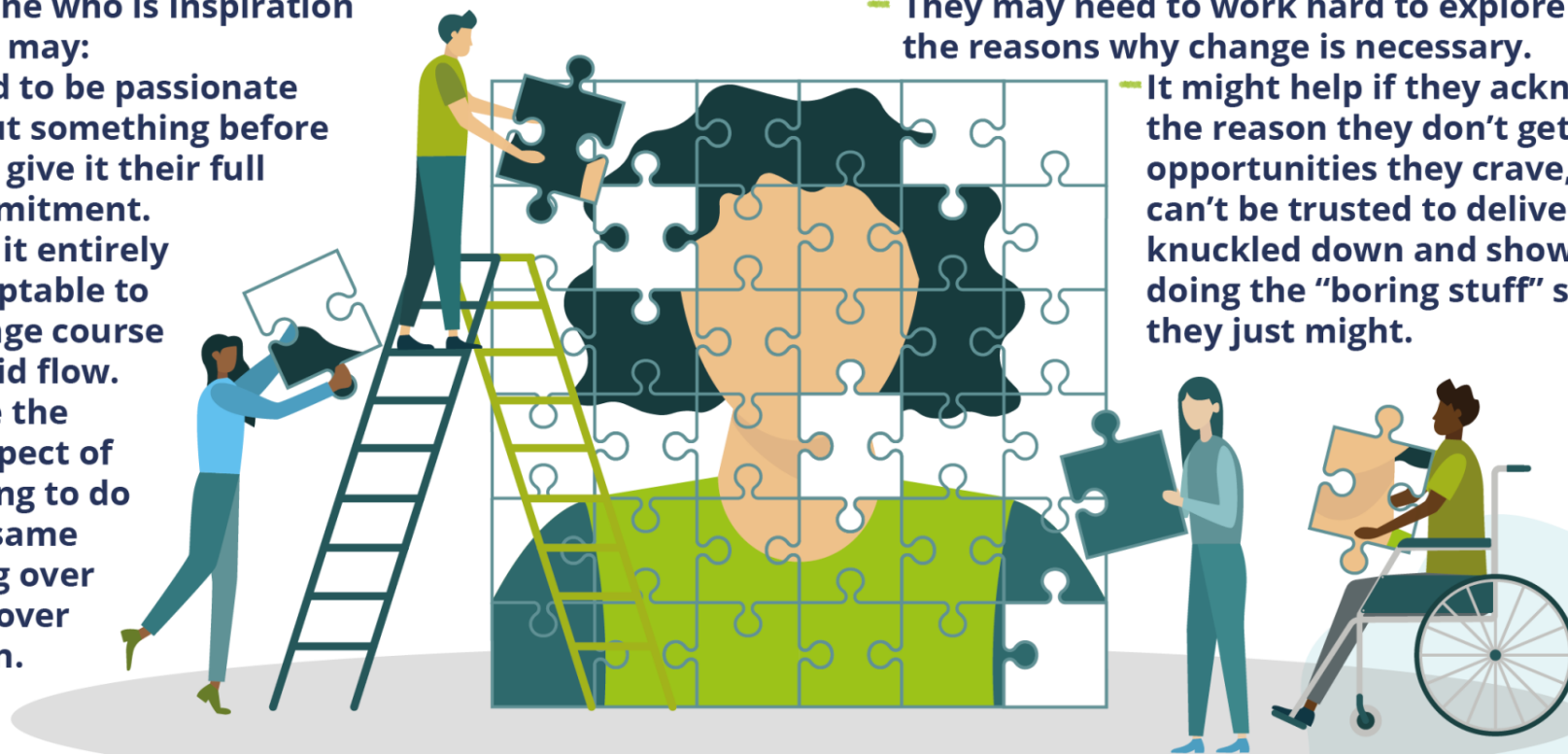
- Each of those aspects has three qualities:
 - Inspiration Driven - Adaptable, Flexible and Spontaneous.
 - Discipline Driven - Purposeful, Structured and Reliable.
 - Big Picture Thinking - Conceptual, Imaginative and Radical.
 - Down to Earth - Practical, Evidence-Based and Cautious.
 - People Focused - Accommodating, Collaborative and Empathetic.
 - Outcome Focused - Tough, Competitive and Logical.
 - Introverted - Observing, Measured and Intimate.
 - Extraverted - Sociable, Demonstrative and Takes Charge.

● Somewhere among those aspects and qualities will be some clues as to what's important, acceptable and possible for someone we're coaching. For example:

- Someone who is Discipline Driven may:
 - Need something that is demonstrably important to focus on.
 - Find chaos unacceptable.
 - Hate the prospect of being unable to deliver against a deadline.

— Someone who is Inspiration Driven may:

- Need to be passionate about something before they give it their full commitment.
- Find it entirely acceptable to change course in mid flow.
- Hate the prospect of having to do the same thing over and over again.



● These facets of their personality may help us understand why they:

- Resist or embrace change.
- Actively scan for fresh opportunities or cling to the status quo.
- Get stressed by a heavy workload.
- Have a reputation for starting but never finishing anything.

● They may also help us explore alternatives:

- They may need to work hard to explore and understand the reasons why change is necessary.

— It might help if they acknowledged that the reason they don't get the exciting opportunities they crave, is because they can't be trusted to deliver but that, if they knuckled down and showed willing by doing the "boring stuff" some of the time, they just might.

Being a *coach*

We hope that you've found what you've read so far interesting. What we really hope, however, is that you now want to do something with that knowledge.

What might an opportunity for a coaching conversation look or sound like?

Here are some examples:

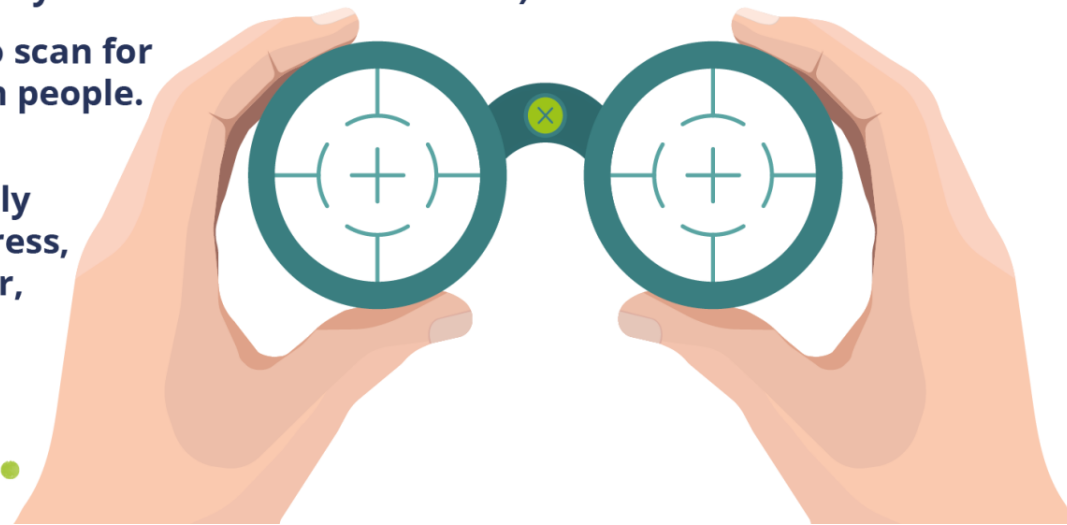
- You notice that someone is consistently missing deadlines that they previously made easily.
- You notice that someone is making a lot of unforced errors.
- You overhear someone talking about how frustrated they are with their job.
- Someone tells you in a performance review that they're keen for promotion.
- Someone new joins your team.
- Someone has just been given more responsibility.
- You get feedback about the exceptional performance of one of your team.
- One of your colleagues seems to be struggling.
- You notice that someone is staying late on a regular basis.
- Someone asks you for help!
- A team member mentions to you that another member of the team is struggling with their workload.



Whether you *scan* for any of those opportunities will depend on how important it is to you.

For example, if you're:

- *Discipline Driven* (Purposeful, Structured, Reliable) missed deadlines and unforced errors will absolutely be on your radar. On the other hand, someone frustrated with their job might not.
- *Inspiration Driven* (Spontaneous, Flexible, Adaptable) someone wanting a change is very much what you might be looking out for while missed deadlines may be less significant.
- *People Focused* (Empathetic, Collaborative, Accommodating) your senses will also be primed to be on the lookout for any sign that someone is struggling.
- *Outcome Focused* (Tough, Competitive, Logical) missed deadlines and unforced errors may also be something you're looking out for, particularly if your personal credibility is at stake. Someone staying late, however, may not, as you may take it for granted that people do whatever it takes to deliver.
- *Big Picture Thinking* (Conceptual, Imaginative, Radical) an expansion of someone's role and the potential excitement that brings, might mean that a promotion or the potential for increased responsibility will be on your radar.
- *Down to Earth* (Cautious, Evidence-Based, Practical) data that suggests that errors are being made is certainly going to be something you'll look or listen out for. Anything not to do with the task in hand, however, like someone's longer term aspirations may not (unless they are a threat to it of course).
- *Introverted* (Observing, Measured, Intimate) you're likely to scan for opportunities for interesting, in depth conversations with people.
- *Extraverted* (Takes Charge, Demonstrative, Sociable) the opportunity to build relationships with newcomers is likely to be on your radar. Someone's withdrawal because of stress, however, may be missed because there are so many other, more stimulating things to look or listen out for.



What those opportunities *mean* to you will then, of course, come into play.

For example, if you're:

- *Discipline Driven* (Purposeful, Structured, Reliable) those missed deadlines and errors will certainly get your attention but not necessarily because they're opportunities to coach. Instead they may be seen as threats that require you to intervene.
- *Inspiration Driven* (Spontaneous, Flexible, Adaptable) the possibility of change may be an opportunity to play with possibilities rather than help create a practical way forward.
- *People Focused* (Empathetic, Collaborative, Accommodating) signs that people are struggling may mean the need to rescue rather than help someone work things out for themselves.
- *Outcome Focused* (Tough, Competitive, Logical) any threat to your credibility may mean that decisive action is needed to get back on track. In this scenario, the needs of the individual may be secondary.
- *Big Picture Thinking* (Conceptual, Imaginative, Radical) your excitement around the possibilities presented by aspirations or actual promotion may be more important than the actual needs of the individual involved.
- *Down to Earth* (Cautious, Evidence-Based, Practical) your focus may be more on the errors themselves and the opportunity to drill down into the data than the person who made them.
- *Introverted* (Observing, Measured, Intimate) you may well spot opportunities to coach but not give yourself permission to do anything with your observations.
- *Extraverted* (Takes Charge, Demonstrative, Sociable) a new member of the team may be seen more as someone to add to your network than as someone who may need your help.



Depending on the meaning you make, of course, you'll probably consider the following:

- If you're *Discipline Driven* (Purposeful, Structured, Reliable), the options you'll consider may include:
 - Reinforcing the importance of sticking to deadlines.
 - Reallocating responsibilities to more reliable people.
 - Do some remedial instruction to make sure that the person fully understands what's required.
- If you're *Inspiration Driven* (Spontaneous, Flexible, Adaptable), the options you'll consider may include:
 - Throwing around a lot of ideas.
 - Encouraging the individual to not overthink things.
 - Encouraging the individual to "follow their passion".
- If you're *People Focused* (Empathetic, Collaborative, Accommodating), the options you'll consider may include:
 - Listening with real sympathy to the plight of the individual.
 - Trying to find ways of linking the person with others who may be able to help.
 - Taking on tasks from the person who's struggling.
- If you're *Outcome Focused* (Tough, Competitive, Logical), the options you'll consider may include:
 - In depth and challenging questioning of the individual.
 - Sharing some "home truths" with the individual so that they really get the seriousness of the situation.
 - Setting even firmer deadlines.
- If you're *Big Picture Thinking* (Conceptual, Imaginative, Radical), the options you'll consider may include:
 - Keeping the focus on the big picture and the connections between key factors.
 - Encouraging the individual to "think outside the box".
 - Encouraging the individual to be "brave" and try something new.
- If you're *Down to Earth* (Cautious, Evidence-Based, Practical), the options you'll consider may include:
 - Encouraging the individual to weigh up the pros and cons of the options open to them.
 - Keeping a close eye/ear out for unrealistic thinking.
 - Cautioning the individual about the risks associated with the situation they're in and the options open to them.
- If you're *Introverted* (Observing, Measured, Intimate), the options you'll consider may include:
 - Asking a lot of questions in order to fully understand.
 - A lot of active listening.
 - Keeping your thoughts to yourself until you're sure of your ground.
- If you're *Extraverted* (Takes Charge, Demonstrative, Sociable), the options you'll consider may include:
 - Sharing your thinking with the individual.
 - Grabbing hold of the situation and actively driving the individual towards action.
 - A lot of emphasis on building the relationship with the individual.

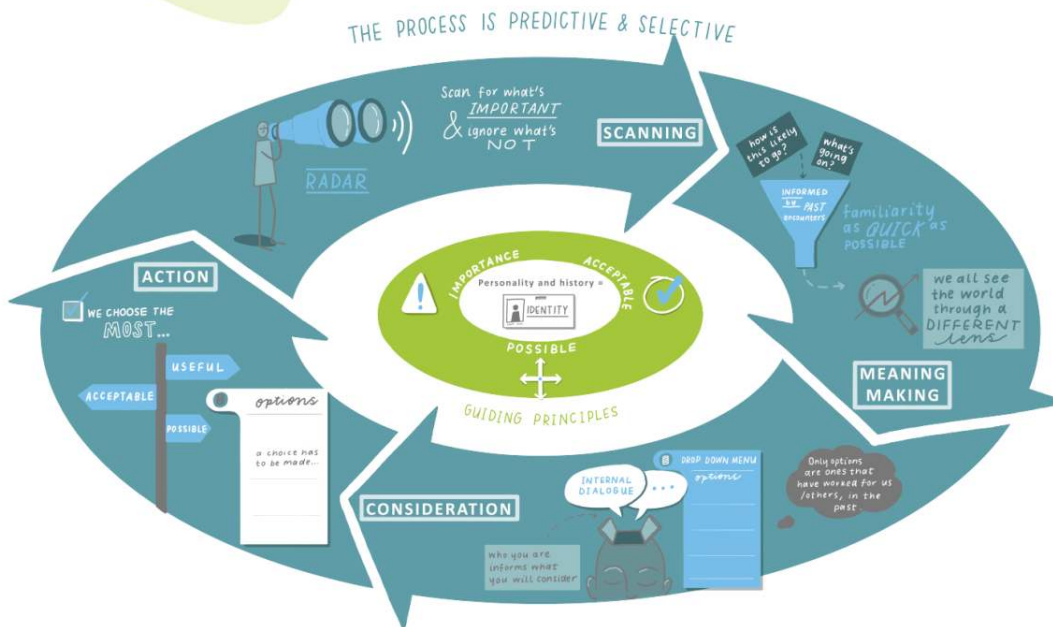
The **COPA** model is a good place to start. Our personal experience is, not surprisingly, that it provides a great framework for a coaching conversation. Being a coach isn't, however, just about following a script. It's also very much about how you respond in the moment and, of course, that will depend on how *your* identity influences your choices. What we've covered so far, therefore, suggests that this is about:

- Whether you believe that coaching people is important enough *to you* that you'll actively scan for opportunities to coach.
- What you believe coaching is. Is it helping people or driving performance or correcting errors or something else? Whatever you believe, your meanings around importance, acceptability and possibility will influence who you believe you can coach and how you approach the opportunities available to do so.
- The options you've got available to you - what you predict will be useful, acceptable and/or possible for you in the moment.
- The choices that you ultimately make.



So, to be a coach, you'll need to spot opportunities to coach, choose to take them and then handle them skilfully. It's helpful to look at this challenge through the lens of:

The OBDMM



"Scanning"

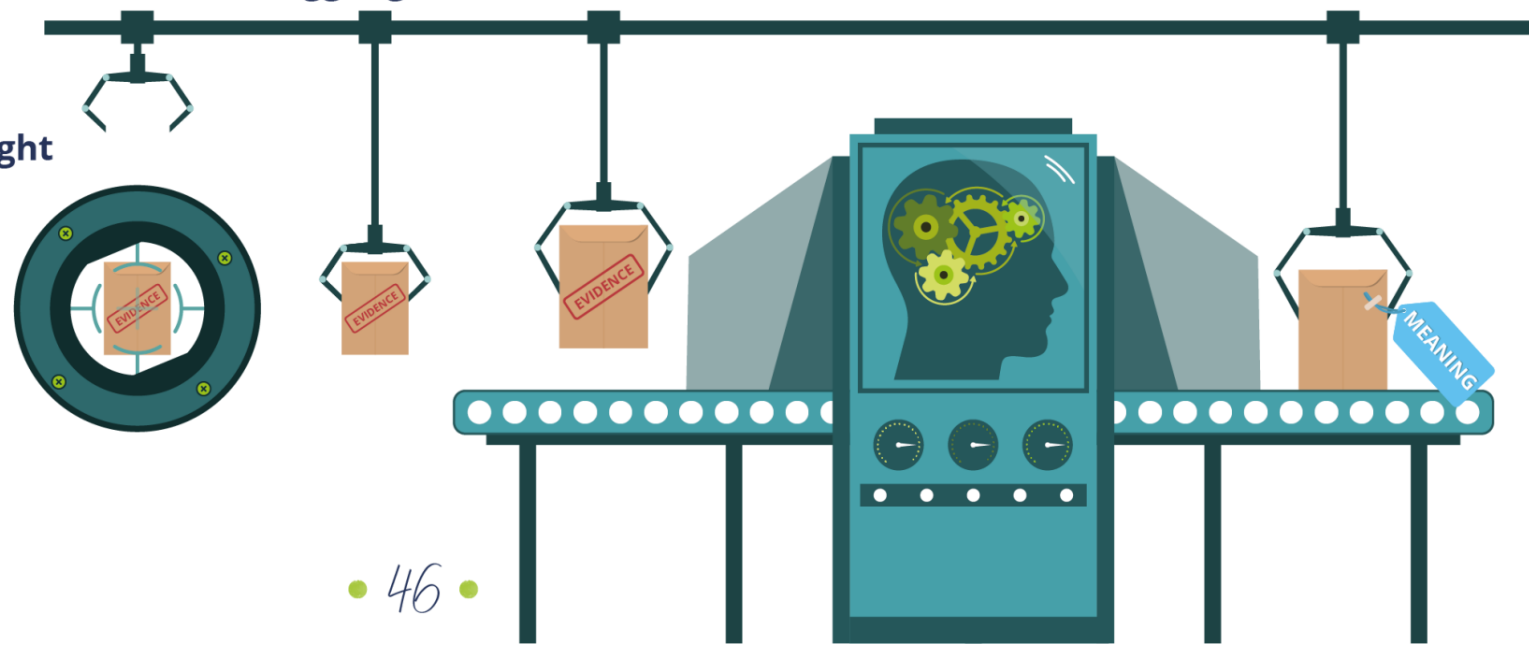
- Whether you have the skills to coach or not is irrelevant if you don't scan for opportunities (Pivotal Situations) to do so. This requires that first, you know what they look and sound like but, more significantly, believe that taking them is important enough to bother scanning for them.
- If, for example, you believe that helping people when they get into difficulties or helping them achieve their full potential is the right thing to do, you're likely to scan for opportunities to coach. If, on the other hand, you believe that people should look after themselves and fix their own problems, then you'll probably avoid or dismiss them. So, some good questions to ask yourself are:

- ❓ Would I recognise a coaching opportunity (Pivotal Situation) if I saw/heard it?
- ❓ How important is coaching to me?
- ❓ What will I get out of spending time coaching others?
- ❓ How would I feel if I failed to help someone out of a hole or exploit their potential?



"Meaning making"

- It's obviously a good start to know what you're looking for and to then scan for those coaching opportunities (Pivotal Situations). Whether you actually take them or walk on by, however, depends on what you think and, more importantly, feel about them. We know that *meaning making* is about importance, acceptability and possibility and so, from the point of view of coaching, it's about:
 - Whether you think/feel that coaching a particular person at a particular time is a valuable use of your time (you may be up against a deadline for example and it might be tempting to fix the person's problem yourself).
 - Whether you think/feel that it's ok for you to coach someone in a situation like that - they may be senior to you in the hierarchy, part of someone else's team or maybe you just don't like them very much (or vice versa).
 - Whether you think/feel that you can handle the situation - the conversation may involve raising some challenging issues, for example.
- So, some good questions to ask yourself are:
 - ❓ Who do I think I'm allowed to coach?
 - ❓ What matters to me in a coaching situation - that the problem is solved or that the person I'm coaching solves it for themselves and learns from the experience.
 - ❓ How much responsibility do I take for other people's development?
 - ❓ How do I feel if I see/hear that someone is struggling?
 - ❓ How do I feel about people that work for me achieving their potential?
- And, just as importantly, you might ask yourself whether this is the kind of conversation I'd be prepared for someone else to have with me?

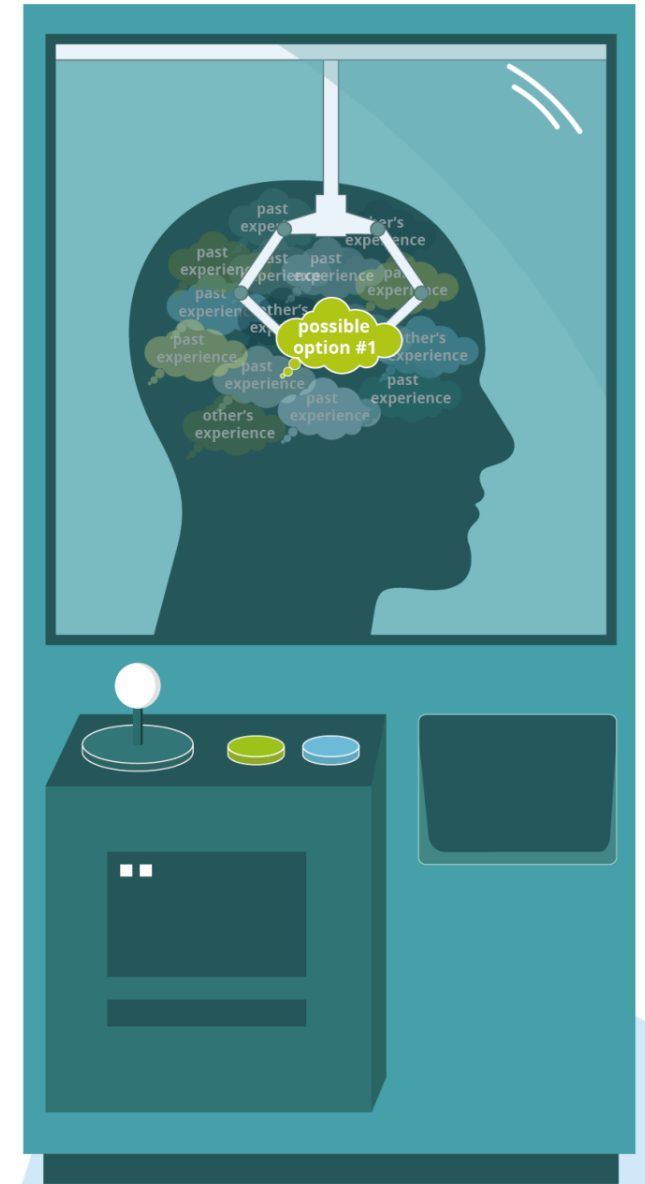


"Consideration"

- The skills associated with coaching - active listening, summarising, asking good questions and giving feedback for example, are not rare (and you probably already have them). Whether you consider using them, however, depends on the meaning you've made of the situation/moment you're in and also how useful, acceptable and possible you think/feel they are in a situation like that. For example, if you're under pressure to deliver.
- So, some good questions to ask yourself are:
 - ❓ What do I think will work here?
 - ❓ What do I feel I'm allowed to do here?
 - ❓ Can I actually pull any of those things off in this situation?

"Action"

- What do you actually do when it comes down to it?



Supporting models

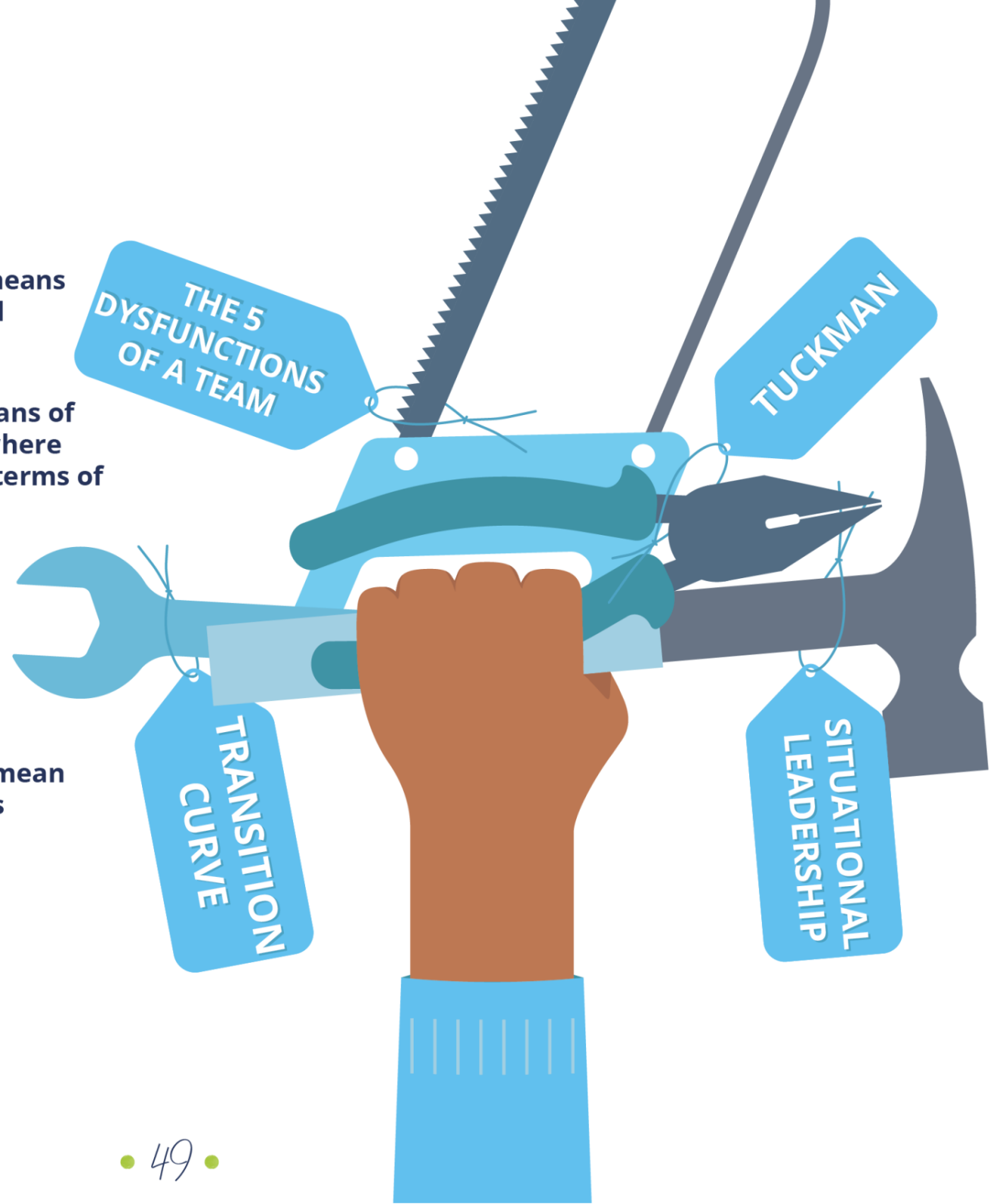
There are also a whole range of tools that you can use to help you as a coach.

Here are some that we use with the people we coach to help them explore their *context, outcomes* and *Pivotal Situations*.



When it comes to *Context* we use:

- **Tuckman's Team Formation** model as a means of helping a person we're coaching understand the team context they're operating in.
- The **Situational Leadership** model as a means of helping a person we're coaching understand where someone they themselves need to coach is in terms of their maturity in a role.
- The **Transition Curve** as a means of helping a person we're coaching understand where they and others might be in terms of their relationship with a change they are involved in.
- The **5 Dysfunctions of a Team** model as a mean of exploring the nature of the team a person is leading and/or working in.



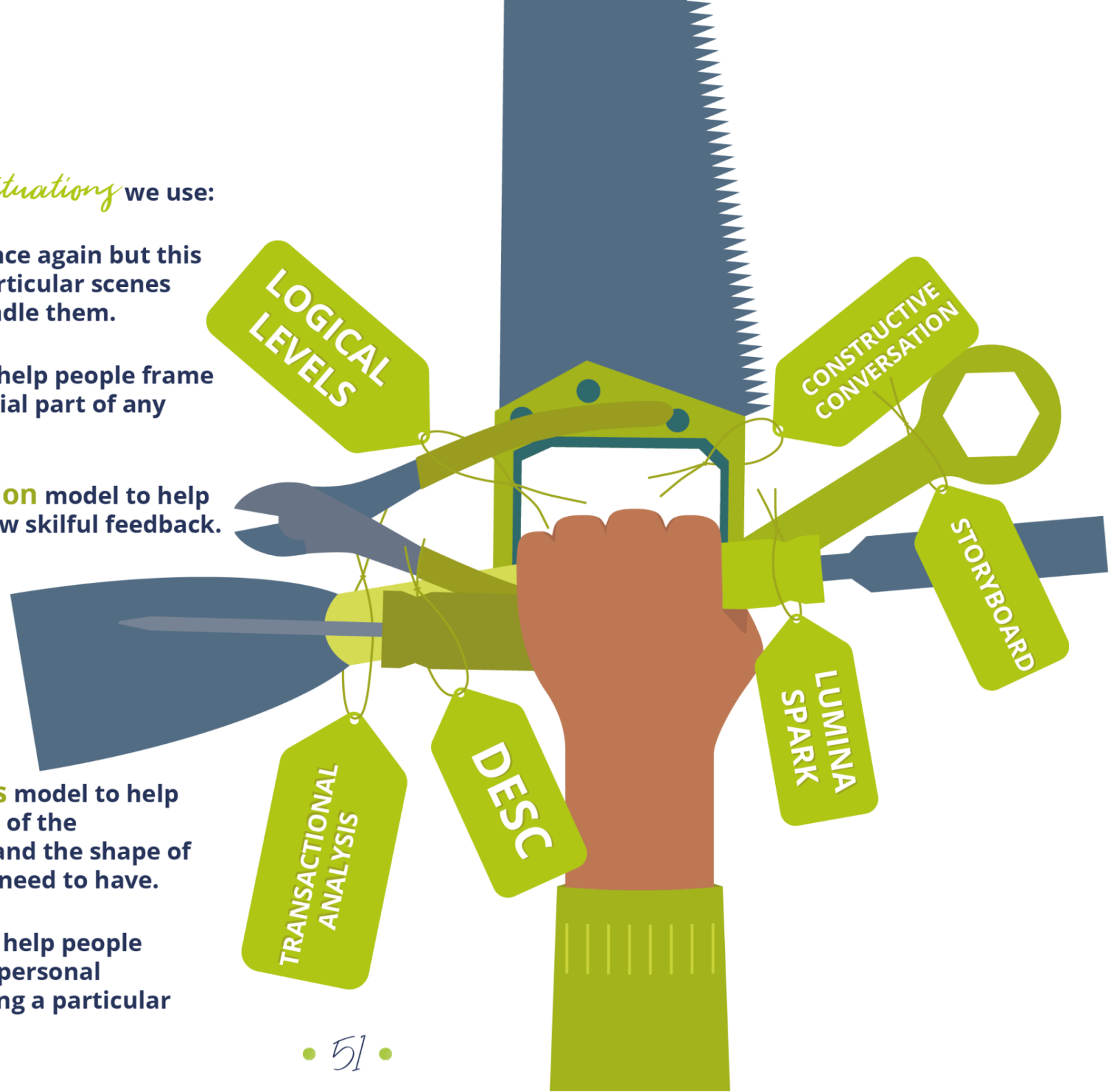
When it comes to *Outcomes* we use:

- The **Storyboard** approach in order to help people bring those outcomes to life.
- The **Relationship Mapping** approach to help people identify the relationships they need to work on.
- A four box grid that helps individuals we coach pinpoint where people they are responsible for are and where they need to be in terms of **Performance and Potential**.
- The **5 Dysfunctions of a Team** model to help people target their interventions in the team they lead or are members of.
- The **Transactional Analysis** model to help people identify the relationships they might need to work on and how those relationships might be if they were more productive.



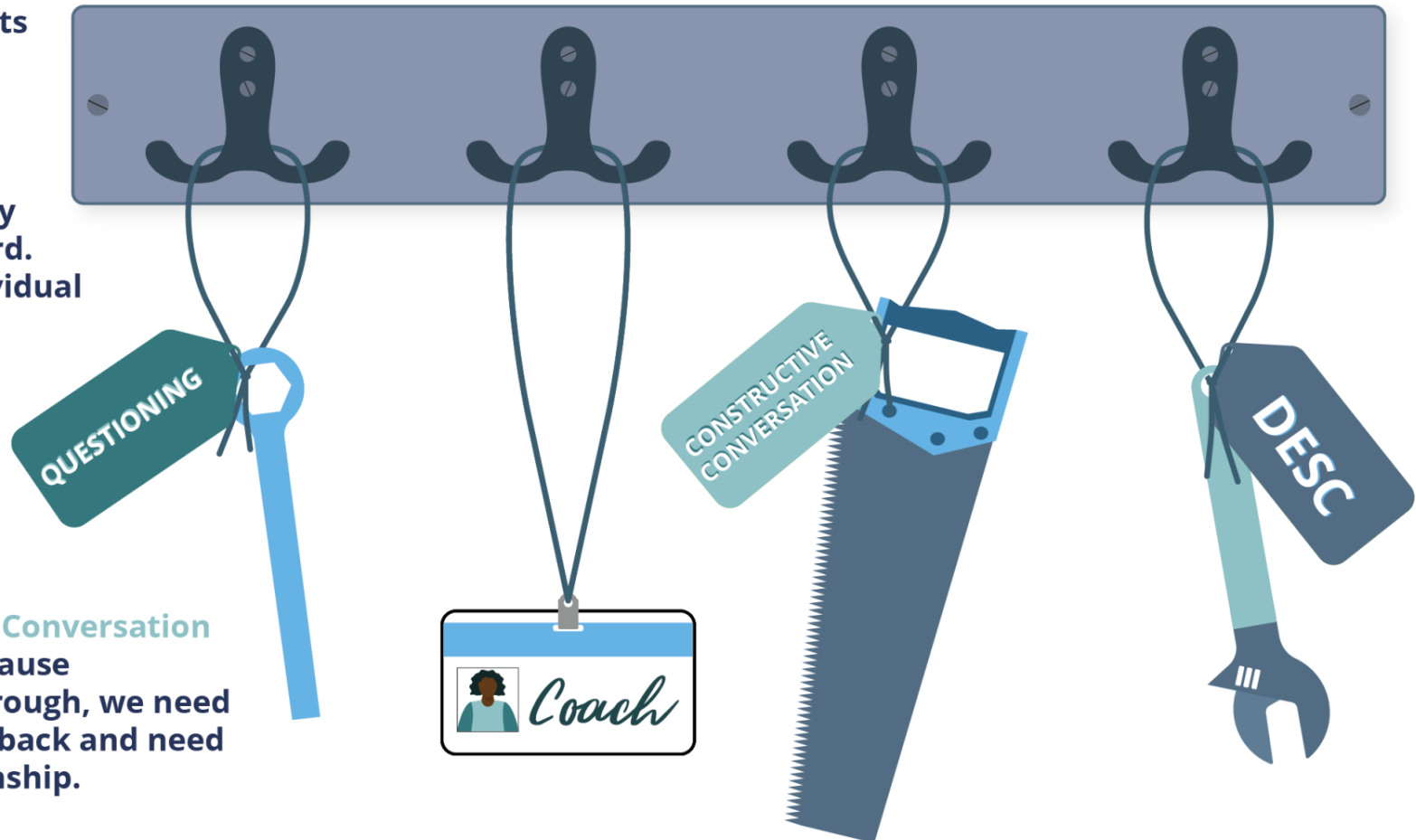
When it comes to *Pivotal Situations* we use:

- The **Storyboard** approach once again but this time drilling down into the particular scenes and exploring how best to handle them.
- The **DESC** feedback model to help people frame the feedback that is an essential part of any coaching conversation.
- A **Constructive Conversation** model to help people manage what can follow skilful feedback.
- The **Lumina Spark** model to help people understand and then explore who they are dealing with in a particular situation and how best to approach them.
- The **Transactional Analysis** model to help people understand the nature of the conversations they're having and the shape of the conversations they might need to have.
- The **Logical Levels** model to help people understand the nature of the personal challenge they face in managing a particular Pivotal Situation.



Other tools we use are more to do with our personal practice as coaches:

- Fundamental to being a good coach is the **skilful use of questions**. This isn't about a simplistic "open questions good, closed questions bad" view. It's much more about having access to a range of questions and knowing how and when to use them.
- There are, of course, other facets of a **Constructive Conversation** that we draw on:
 - The use of **silence**.
 - Demonstrating that we're genuinely listening by actively **playing back** what we've heard.
 - **Mirroring** and **pacing** an individual in order to build rapport.
- We also use the **DESC** feedback model ourselves to frame the feedback that we sometimes need to give the person we're coaching.
- We also apply the **Constructive Conversation** model to our own coaching because sometimes, to make a breakthrough, we need to share some challenging feedback and need that not to damage the relationship.





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