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LEGACY REFLECTIONS: TEN LESSONS ABOUT BECOMING AN EXECUTIVE COACH

Robert J. Lee
iCoachNewYork, New York, New York

with Michael H. Frisch
iCoachNewYork, New York, New York

This article presents 10 important lessons about becoming an executive coach that the author gained in the course of a long career as a consultant, educator, and executive coach: (1) Shape your own set of best practices through multifaceted learning; (2) Convey a concise understanding of coaching; (3) Be clear about who is the client; (4) Work the interplay between relationship and contract; (5) Manage anxiety: the client's, the sponsors', and your own; (6) Leverage feedback; (7) Convey confidence along with humility; (8) Toggle between internal and external processes; (9) Choose executive coaching as a career with full awareness; and (10) Stay the course as you evolve. An introduction presents the background that frames the author's perspectives and a conclusion is offered with the final lesson.

Keywords: executive coaching, coach training, coaching, professional coaching

This article is my attempt to capture lessons I have learned about becoming an executive coach. I share these in a spirit of openness to encourage reflection, discussion, and learning by others interested in this surprisingly difficult area of practice within the larger field of organizational consulting.

Let me begin by giving you a sense of what I bring to the subject and how I understand it. My professional experience began in Industrial/Organizational (I/O) psychology and went on to include career counseling/outplacement, consulting on leadership and Organizational Development (OD), business management, leadership education, active participation with professional societies, and academic teaching. I decided to focus on executive coaching (EC) after leading the Center for Creative Leadership and returning to New York City. This was in the late 1990s when executive coaching was still defining itself and this journal had broken new ground by dedicating full issues to the subject (Diedrich & Kilburg, 2001; Kilburg, 1996). In 2002, I was invited by New School University to design what I believe was the first graduate-level course on executive coaching in New York City, which I first delivered that autumn. What I discovered through that process was that the multifaceted dynamics of coaching practice needed to be reflected in multifaceted learning experiences for students. I was able to secure for each student a short, but real, coaching case in various

Robert J. Lee *with* Michael H. Frisch, iCoachNewYork, New York, New York.

This article was begun near the end of Robert J. Lee's life, and completed post-humously with the assistance of his close collaborator for several years, Michael H. Frisch.

Correspondence concerning this article should be addressed to Michael H. Frisch, 800 West End Avenue, Suite 1EF, New York, NY 10025. E-mail: mfrischphd@gmail.com

organizations in my network, used multiple articles and books to provide breadth of thinking, invited other practitioners to join me in leading classes, and challenged each student to describe his or her own unique way of engaging with a client.

At the same time I was thinking about how to take this pedagogy and content further to train actual professionals who aspired to offer coaching services. This was a more complex endeavor, and I was very pleased when several experienced colleagues agreed to join me in this adventure without regard to time or compensation. These colleagues—Michael Frisch, Karen Metzger, Jeremy Robinson, and Judy Rosemarin—all had extensive coaching experience but, more importantly, all had also hired, trained, or supervised other coaches and had ideas about how to do that in an open-enrollment course. I had previously taught at the iCoach Academy in the United Kingdom and in South Africa, and when I told them of our plan to deliver a professional coaching course in New York City, they invited me to create a sister organization, iCoachNewYork. We liked that idea and in the spring of 2004 we delivered our first Professional Coaching Program (PCP) to a group of nine eager coaches, including both internal and external professionals, in a bartered corporate training room over 3 months. Thanks to the invitation of Harry Rosen, then chair of the Management Department at Baruch College, CUNY, we found an academic home for the course in 2005 and have continued delivering the course there every spring. iCoachNewYork also has taken various aspects of the course in-house to organizations with internal coaching programs.

With the year 2015, PCP is being offered for the 12th time, and I am very gratified to report a strong response from prospective participants with well over 150 in our alumni network and strong cohesion among the faculty. Although almost every aspect of the course has evolved, marked by our writing and publishing an accompanying textbook, *Becoming an Exceptional Executive Coach* (Frisch, Lee, Metzger, Robinson, & Rosemarin, 2012), the core principles remain surprisingly stable. One in particular forms the cornerstone of both my thinking and PCP: No two people coach in quite the same way, even though the broad outline of a typical engagement may be consistent. How each of us shows up in a helping role reflects a unique mix of personality and experience, yielding differences in interpersonal styles, beliefs about growth, choices about how to facilitate self-insight, even views of who is the client and how to structure the coaching process in a formal contract. I encourage each coach at whatever level of experience to examine and become articulate about how his or her style manifests in a coaching relationship, for better or for worse. You cannot help others if you are a mystery to yourself.

Another enduring principle in the course is that the executive coaching process is itself a nuanced and individualized dance between three parties: coach, client, and organizational sponsors. Much of its power lies in its flexibility to engage a wide variety of clients and needs while charting a path through sometimes inconsistent, or even conflicted, contexts. I believe, and we teach, that navigating those currents at the same time as fostering client self-discovery requires a truly connected relationship between coach and client. Fostering insight, collaboration, and growth requires some degree of coach freedom and process flexibility. We want to empower coaches to be both excellent discussion partners as well as engagement managers, and frankly we have not found other courses that balance that dual focus the way we do.

My views about executive coaching have become clearer over time. Teaching and writing, combined with day-to-day professional practice, tend to do that and maybe team teaching pushes clarity further, with the added push from participants who for the most part are very experienced professionals before they find us. They are highly attuned to the overt and covert feedback they get from their coaching clients, and I have learned much about coaching through supporting the struggles and experiments of newer coaches. In the end, helping them help their clients is not much different than me helping my clients directly. In fact, having my ego one step removed from the actual client has aided me in distilling generalities about what works in executive coaching. As things go, I was able to extract 10 lessons about becoming a successful executive coach from my experiences and reflections, and I offer them humbly in the hope of adding to your thinking and maybe even your practice decisions. These are points that guide the way I operate as a coach and coaching instructor, so I can describe them with confidence, but I also celebrate your free choice to integrate them into your approach to coaching, or not. At least you have my assurance that they are well-grounded in many iterative cycles of practice, teaching, feedback, and reflection. Just as in coaching, I would like to provoke your questions and ideas rather than promote any particular view.

Lessons

1. Shape Your Own Set of Best Practices Through Multifaceted Learning

It has been said that leading cannot be taught but it can be learned. I believe that applies to the art of coaching as well. Each has foundational skills that are required learning, but the real goal is to bring yourself into the activity as an expression of who you are. How does one get started on the path to learning a performance art like leading or coaching when there is so much that is variable? The answer is multifaceted learning.

To begin with, draw on the available books and articles that have been published. There are many commentators, researchers, and theorists who provide written perspectives and advice on the practice of coaching (including special issues in *Consulting Psychology Journal* [*CPJ*]— see Diedrich & Kilburg, 2001, and Kilburg, 1996—and edited collections such as Kilburg & Diedrich, 2007). More interactively, professional meetings, workshops, and even fully dedicated conferences on coaching are also vehicles for learning. These relatively informal opportunities to read, listen, and discuss coaching are good ways to invest time in building a foundation of knowledge, as well as identifying questions to explore.

Furthermore, since the early years of this millennium, free-standing and university courses on coaching have proliferated, including certificate and even graduate-degree programs. Formal educational experiences can be highly useful if a few considerations are kept in mind. First, it is essential that the type of coaching taught is consistent with the learner's objective. Many courses treat all coaching as a singular practice—whether life, personal, career, business, or leadership coaching— but this is an oversimplification. There are important differences among these interventions, especially if one chooses to coach in an organizational context, managed by organizational sponsors, and aimed at an individual manager or executive—that is, if one wants to become an executive coach. If EC is what you want to learn, then you should seek out a course that teaches it specifically. If you are not sure, then consider a more general program to help you decide on which type of coaching to practice.

Second, in my view EC is more aligned with the helping professions than with consulting. It is not a technical profession like accounting, engineering, or even organizational psychology, in which clients expect recommendations and answers. Courses of study in the helping professions consistently make use of actual practice opportunities or internships combined with case supervision from experienced practitioners so that a different emphasis, on process rather than on answers, can be explored in real time. In other words, there is an apprenticeship or *learn-by-doing* aspect to becoming a helper. That model of learning is not easy to find but it is important in becoming an executive coach. One can learn a lot from articles, books, conferences, and instructors, but these inputs need to be applied with real clients and critically examined in the context of actual casework to refine helping skills and build confidence as a practitioner.

Third, and this is a key aspect of the learn-by-doing approach, is that the classroom experience must be open and active. Instructors and students need to be honest, committed, and parallel learners. No one should be phoning in or showing up only when convenient. Fellow learners and teachers need to be true discussion partners, able to talk with each other at a deep and authentic level, which is not typical in the usual professional training. The classroom becomes a laboratory for students to analyze their own practice experiments and hear about others' experiences, with a safety net provided by the instructors. In effect, the same confidentiality boundaries that exist in coaching and case supervision should extend to the coach-training classroom. Students need to feel safe to air their views about many topics, such as contracting, feedback, client resistance, and, most importantly, dealing with their own doubts and anxiety. This type of training may be aided by technology in various ways but, for the most part, convenience is not a high priority. Instead, it requires unusual amounts of in-person time and attention from both instructors and students to support finding one's voice as a helper.

There are also topics to learn that are essential to EC but may not show up enough in coach training. One broad topic is a grasp of organizational life, such as functions, titles, hierarchies, power dynamics, politics, and especially in vitro leadership. A deeper dive into HR systems, processes, functions, and language is also useful because EC usually is contracted by HR professionals, some of whom may be coaches themselves. Learning about organizational life happens most thoroughly by direct experience within an organization. Having internal organizational experience allows one to generalize to other sectors or industries. For executive coaches, this usually means large business organizations, but such work experience could include a wide variety of organizational settings, such as not-for-profits, private-equity-portfolio companies, entrepreneurial/start-ups, educational institutions, government, medical/health providers, professional-service firms, and family businesses. Each has its special dynamics, and experiencing those could provide a foundation for the contextual knowledge that is part of an EC practice.

Finally, as soon as possible after formal training, it is beneficial to find opportunities to do EC without regard to fees: pro bono shorter engagements with clear templates supported by conversations with a committed journey partner who can provide both a safety net and encouragement to stretch. Embrace the parallel processes of coach-client learning and do not be put off by the always surprising overlap. The end of this initial learning phase should be the self-awareness, confidence, and freedom to bring more of yourself into your coaching work.

2. Convey a Concise Understanding of Coaching

Because *coaching* can refer to many different activities, what is being done specifically needs to be clarified at the beginning of every coaching relationship. Adding to this challenge is the fact there is a range of people who need that clarification: client, boss, HR stakeholder—maybe even a seatmate on a flight to LA. The other person may have a sophisticated sense of what is meant by EC, just a passing familiarity with coaching in general, or only a notion that it is tied to sports. The explanation you come up with should be flexible in response to those audience variables.

I might have said that your next lesson is to learn to define coaching for the people you are working with in a coaching engagement, but clearly a lot more is required than merely reciting a standard definition. You need to convey an understanding that can be shared flexibly, potentially to help others contribute to an EC experience.

For the following discussion I assume that you, the coach, are talking to a client at the start of an EC engagement. The client needs to know what he or she is getting into, and you need to use this opportunity to build your credibility and trustworthiness. Clients usually ask questions, and you must become comfortable weaving your explanation into your answers, tied to what you already know about the client and context.

Describing your approach to executive coaching is the beginning of your relationship with a client. Here are points that typically are covered during those important moments. At its core, EC is a one-on-one process within a wider context that includes sponsors and stakeholders. Furthermore, it has a time frame, confidential conversations, and typical focal topics that could be mentioned. From there the description could extend in many directions, mostly determined by a specific client's context, interests, and openness. EC engagements usually focus on some aspect of leadership but they can tilt toward people management, self-management, or even legacy. Sometimes specific felt needs from clients or sponsors are on the table from the start—for example, leadership impact, communication or influencing skills, or readiness for promotion. Most often, specific and actionable goals emerge later after assessment, feedback, and insight. It is useful if this early description of EC emphasizes process and discovery rather than trying to provide an exhaustive list of likely topics.

It is also important to clarify what EC is not: It is not consulting to improve the organization or to solve particular organizational or business challenges, such as staffing, morale, or strategic direction. Clients are likely to have experience with consultants and may overgeneralize those to coaching. Unlike consulting, however, EC emphasizes facilitation of the client's growth rather than providing answers. This is an important distinction that clients, especially C-level ones, may not grasp at the start of an engagement and may actually resist as time goes on because everyone wants answers. Giving answers, or even firm recommendations, however, is a slippery slope, so I encourage a bright line between coaching and consulting.

Another bright line is that EC is not aimed at the client's personal life. Clients are whole people and their open sharing of personal factors and challenges may be a positive indicator of trust with the coach, but these topics should not become focal areas for the engagement. Other helping professionals are better trained to work on these areas and executive coaches can learn to diplomatically redirect clients when those needs are apparent or pressing.

EC has several other features that may surprise clients. First, the process is transparent. As an executive coach, you are not working behind the scenes to manipulate the client or the context, even if that context has obvious deficiencies. On the contrary, you explain the process, boundaries, and confidentiality clearly and are open to all questions. You want your clients to be full partners in the process. In this way you can jointly determine the responsibilities, direction, speed, and objectives of the coaching; you own guidance about the process, and the client owns action and outcomes. Further, by being transparent about your role and responsibilities, you are less likely to slip into advising or consulting.

Second, even as you support the client in navigating the coaching process, you are not the client's advocate. If you do any significant amount of EC, you will encounter situations that test that position and push you into rescue mode. Organizations can be blaming, judgmental, and short-sighted, among other frustrating characteristics. When any of those are combined with arbitrary organizational power, clients may be justifiably angry and frustrated. As a coach you can advocate for a fair and balanced coaching process and you can work to improve the alignment between the client and sponsors, but taking up the client's cause both disempowers the client and alienates the sponsors. There is much value during a fraught process in being an empathetic ear for the client and a discussion facilitator for sponsors. Direct advocacy is reserved for attorneys rather than coaches.

3. Be Clear About Who Is the Client

Just below the surface of defining EC is a tricky question: Who is the client? My answer is that the client is the person I am coaching. I refer to others on the scene as *sponsors* (HR and boss) and *stakeholders* (wider team). A coaching client is a "who," not an organizational "what." It is not the agency, company, department, group, or system that will have my main attention. It is the person in the coaching relationship who is the primary beneficiary and majority owner of the coaching engagement, even though in EC that person is not paying for it.

I have three reasons for making this distinction. First, it helps to clarify both roles and confidentiality. In EC, confidentiality is not designed to be absolute; sponsors and stakeholders deserve input to a development agenda, and, at the least, sponsors help finalize and implement it. I want them to feel a partnership in fostering the client's growth. In some ways, the more coaches the client has, the better. However, my commitment to confidentiality with the client must be stronger than the supportive relationships I have with sponsors.

Second, labeling the person that I am working with *client* reminds me of the priority that I have to design and manage a balanced process even when the context is changeable and confusing. As mentioned above, organizations often contain ongoing narratives and cross-currents and I want to avoid mission creep toward organizational advising.

Third, and the main reason that I label the individual *client*, is because coaching does not work well if the person being coached does not end up owning it. It is natural for a client to be wary at the start of an engagement, but a key unstated objective of EC is that the client should feel primary ownership of effort and results. During a successful engagement, there is a natural shift in responsibility that occurs, first from the organization to me as coach, and then from me to the client as individual benefit is realized. That last shift in responsibility is a key indicator of likely progress in EC. It may not be tracked in any formal way but referring to the individual as *client* helps me tune into ownership. If sponsors, or coaches, stakes remain higher than the client's, results will be less than they could have been.

Focusing on the client, however, should not obscure awareness of the context within which that person works. You will never know that context as well as the client, but you will begin to understand his or her perceptions of it, even those that puzzle you. The client's behavior may only make sense once you understand some of the contextual dynamics. Your fresh perspective should empower your questions and observations, which can lead to insight and learning. Newer coaches can be self-conscious about what they do not know, but there is a benefit to organizational ignorance: Access your curiosity about how things work there and discover that there is utility in being marginal to the client's organizational life. Never underestimate the power of common-sense questions to instill new perspectives and hope for a better future.

Furthermore, both the client and the organization need to be ready to utilize coaching for what it is. Organizational sponsors may not appreciate the importance of their role in a person's ability to change. In general, clients are not crazy, and their bad habits and defensiveness probably have a basis in the reality of coping with a less-than-ideal context. You may be able to help sponsors more fully encourage clients and help clients navigate difficult organizational currents, especially if you have built flexibility and safety into the coaching process. On the other hand, there are both organizational contexts and individual client characteristics that are not conducive to building coaching relationships. As confident as you might feel about your work with clients, coaching is not a magical panacea. Diplomatically stepping away from, or recontracting, an engagement, potential or active, should always be an option available to you.

4. Work the Interplay Between Relationship and Contract

Which comes first, the contract or the relationship? Is it possible to have a productive relationship with a client without first having a clear contract? Can you establish a clear contract without building some degree of trust with a client? What I have noticed is that these two pillars of EC evolve together. Coaches create an effective working relationship with a client only when the contract clearly sets out the terms and limits of the coaching process. However, you cannot anticipate every contingency at the start of coaching, nor should you try. As a result, a contract, at least in outline form, and a relationship, begin simultaneously and then are revisited as the engagement unfolds.

What do I mean by the term *contract*? I mean all the agreements—oral, written, and implied—among the sponsors, client, and coach (Lee, 2012a). Contracting sets process expectations, milestones, and time frame and identifies what is confidential versus what is shared. Contracts may also describe data gathering, assessments to be used, and likely goals of the engagement. Formal written contracts usually also include fees, invoicing procedures, payment schedules, and even nondisclosure assurances. The presence of a formal third-party contract is a key differentiator of EC versus other forms of coaching: We project out across the entire arc of the engagement, not just within session dynamics. Managing an engagement that includes coach, client, and possibly multiple stakeholders in the sponsoring organization requires a contract aimed at keeping everyone aligned.

Contracting actually starts before the coach arrives because the sponsors would have initiated earlier steps: They have determined that a specific person would benefit from EC and that it is an appropriate and cost-effective intervention for that person, and they have specified when a coach, or coaches, should be brought in to meet the client. After the coach-client match has been made, contracting is formalized to cover some or all of the points mentioned above. Clients may not actually see the formal contract but key points will be discussed, including the implicit psychological contracts between coach and client that may emerge at the same time.

There are many subtleties in the joint evolution of relationship and contract. Being an executive coach means establishing a special relationship with a client, unlike other relationships in life. The coach has no positional power and is in an unusual one-time role with the client, which will be confirmed over time in words and actions. The contract establishes a foundation for this to occur, and an effective coach builds on that so that the relationship will deepen and strengthen. Research on common factors for effectiveness in the helping professions (McKenna & Davis, 2009) draws a clear conclusion that the quality of the relationship is more important than other factors under the helper's control, and a contracted process capitalizes on those findings.

Just as the contract supports growth in the relationship, there are threats to the relationship as well. The professional helper from outside the organization, often with an advanced degree, has an unearned aura of wisdom and authority. This is not necessarily desirable, or even helpful, but it is there. Your comments can be overgeneralized, your remarks over-interpreted, and your insights overvalued. What you thought was a pump-priming suggestion may be viewed as a dictate. Differences in age, experience, nationality, language, gender, and a host of other variables inject unknown moderators into how your impact is felt by the client and the organization. Clients and sponsors will not be aware of all this transference, but as a professional you need to tune into those reactions and modulate accordingly. This may make you uncomfortable, but you need to accept the power you have and yet never believe that it exists outside of the mandate of the contract.

As in other helping relationships, coaches are well advised not to try to become the client's business contact or friend. You are likely to be a resource in various ways after a successful engagement, and you may end up on your client's *personal board of directors*, but this should not extend to the client becoming a target for marketing or socializing. With the contract in the foreground, the perfectly human needs for closeness, approval, and more business should not determine how you operate before, during, or after a coaching relationship. Coaches need to embrace the contracted boundaries that our clinical brethren have defined for helping relationships even if we do not fully appreciate their importance for the relatively safer process of aiding a client's professional growth.

The term *contracting* also is used to describe setting the goals of the engagement. My view is that it is best if these evolve in the early stages of coaching, usually informed by informational interviews and other assessments. One of the coach's most important tangible contributions is to help the client make sense of the subjective swirl of feedback that he or she probably has heard before. We bring credibility to the descriptive information we collect and then help distill it into goals that make sense to sponsors, feel right to the client, and are actionable.

More specifically, during the first third of the coaching engagement, sponsors will want to know what the coach and client are working on. You need to anticipate that by inviting sponsor participation in confirming the goal contract (that we usually call an *individual development plan*). This interplay with sponsors is partly to assure the organization that productive work is happening but it also serves to set up a discussion about alignment between the sponsor's original felt needs and the client's coaching goals. I have found that sponsors are willing to adjust their original wording (often phrased generally or negatively, such as, "Become a better manager," or "Stop yelling at your staff") but they do expect the substance of those original needs to be addressed. Furthermore, those sponsors who think about the overall process want clearly contracted goals so that the effectiveness of the coaching intervention can be evaluated later. From a professional coach's point of view, a productive relationship, a contracted process, and some hard work are required to help goals evolve so they resonant strongly with the client and also speak to the needs that instigated the engagement in the first place. Gaining consensus for goals that do that is a major milestone in both the client relationship and the EC contract.

5. Manage Anxiety: The Client's, the Sponsors', and Your Own

EC is triggered by a need for change either in the client's behavior or as part of a larger organizational-change effort, or both. Who initiates addressing that need for change varies, but if coaching is to actually deliver results, at some point the client at least accepts, and hopefully embraces, that need for change. There are, however, many uncertainties that accompany the need for change: Articulating what to change, supporting the effort to make the change happen, determining how long it will take, and watching for unexpected distractions and side effects that may occur. Those uncertainties, as well as fears and concerns unique to an individual, make anxiety a given within EC. One might even say that if there is no anxiety about EC outcomes, it is probably not worth doing. As a result, coaches must become skilled at recognizing, accepting, and handling anxiety, although it shows up differently for each person in the picture.

Client. Although less common now, sometimes EC is associated with preventing failure, halting a slide in performance, or some other remediation effort. In these situations, client anxiety is present well before, and then into, the engagement. There may be an implied threat of job loss, stigma about needing coaching, and mutual blame, resentment and other difficult feelings. In such an environment, there are aspects of the process that also may be uncertain, such as sponsor roles, confidentiality, and time frame for improvement. Not surprisingly, the push and pull of resolving these contracted elements increases anxiety, all tied to the perceived likelihood of achieving the changes envisioned.

Even in less fraught situations, anxiety is likely to be present for the client, who needs to find time for the process, rely on a relative stranger, and trust the organization's motives in providing the service. The strength of these concerns may slow the process of relationship-building with the coach by increasing the client's vigilance, skepticism, and testing of the coach. Avoid taking these reactions personally; instead view them as natural by-products of the change effort you are leading, confident that they will ease if you do good work.

It is easy to equate a client's anxiety with what clinicians may label as *resistance*. Unfortunately, this puts a rather negative connotation on what is happening. In my coaching model, I reframe client resistance as *reluctance*. As such, when it spikes it is a signal that I have touched on something the client finds important enough to protect. In practice, this becomes a sign that reads, "Dig here, but carefully." Yes, clients will be anxious when you touch that spot, but it can be explored respectfully, and as you do so, trust will increase. In fact, if early anxiety is not replaced by trust, progress in the entire engagement will be compromised. In rare instances, client anxiety is so generalized or intractable that the engagement needs to be halted, or at least postponed.

Sponsors. The sponsors of the coaching assignment (the boss and the HR people) have their own reasons to be anxious. Will this be cost-effective? Will the data collection be disruptive to others? Could coaching actually make things worse? Can we trust this outsider playing in our sandbox and engaged in a somewhat mysterious process?

They might not express those questions openly but the underlying uncertainty can trigger intrusiveness or process controls. All the more reason to do clear contracting before the engagement starts. Whereas client anxiety is eased by trust, sponsor anxiety is eased by coach credibility and process clarity. When you speak knowledgeably about your approach and process, sponsors are reassured. As the engagement progresses, you will learn where specific tension points are for sponsors: who to interview, when to check in with sponsors, and how to collaborate on action plans and evaluating results. In response, you can make sure contracts address expectations about those process steps. Anticipating and grounding sponsor anxiety makes it is less likely to pop up inconveniently in hallways or casual conversations.

Still, coaching in the early stages is a bit of a black box for sponsors. Be sensitive to the feelings that may be triggered by their uncertainties. Even the best contracting may miss a pressure point felt by sponsors, triggering inquiries that can become tense phone calls or even demands. When anxiety does get the best of sponsors, your credibility with them and confidence in yourself should lead them to be reassured by your responses to their concerns.

Coach. Are coaches anxious about relationships and outcomes? Of course! Coaches work hard to get their slice of business and want to be viewed favorably so they will get more slices. However, coaching outcomes are not under the coach's control. It is the old quandary of lots of responsibility with no formal authority. You must live with that quandary without becoming desperate or grasping. Coaches need to be professional and confident regardless of what they are experiencing inside. With low control and high exposure, how do you find a way to feel affirmation about your work?

I think this is accomplished through two processes: client learning and coach reflection. We all want our clients to change and grow in ways that make them more effective managers and leaders. We help design those change efforts so that outcomes are observable to others. Being both the existentialist and I/O psychologist that I am, however, I know the vagaries of observations that become perceptions. I sometimes wonder how many of the accolades that I and my client's receive are simply Hawthorne effects or expectancy theory in action. I feel deeper satisfaction about progress when I observe a client actually learning in the moment. This can take many forms including pregnant pauses, freeing insights, acceptance of risks, and feeling ready to tackle difficult issues. When I am fostering learning in real time, there may be anxiety present but there is also a very satisfying energy and connection that gives me confidence that I have made a difference.

When I am anxious about results and when my best efforts do not seem to be triggering learning, I find that reflecting on the situation, either on my own or with trusted colleagues, helps to reenergize my progress. Case supervision with a colleague and what I have called *self-supervision* (Lee, 2012b) are essential antidotes to the anxiety about disappointing progress. Taking that anxiety seriously and using it to examine choices, actions, blind spots, and assumptions are necessary for both grounding the anxiety and providing ideas for how to make better progress. Supervision can be described as *coaching the coach about coaching* and is respected, or even required, in the wider world of helping professions. Maybe it also works because it reflects the dual nature of learning in a helping relationship: If we are learning, the client is more likely to be learning too.

Other more tangible anxiety triggers also exist for coaches. Unless you are an internal coach, you will be working on your own, in a small firm, or as an affiliate of a larger consulting firm. Ultimately you, and they, are measured by commercial success as well as client satisfaction. That brings the inevitability of what I label CFA (cash-flow anxiety). Coaches and other consultants tend to look at their calendars with deep concern: too much, too little, or the wrong kinds of business; too much travel; not enough time for work and family; and so on. The coaching field is growing and sometimes it seems that the number of coaches is outpacing available clients, resulting in more competition, commoditization of services, and the inevitable downward pressure on fees, thus exacerbating CFA.

Your anxieties can lead to poor decisions, such as taking cases that have ambiguous support from sponsors or that show other indicators of lower probabilities of success. Even more troublesome, your anxieties may truncate contracting when it is most important for these problematic cases. It may not seem fair but there is an expectation that coaches self-manage better than other people. You do need to know yourself well enough to both monitor your anxiety level and have strategies for managing yourself. Certainly physical activity, quality time with others, meditation, art, and other pursuits can counterbalance anxiety and ease its hold. As mentioned above, coaches should have their own go-to relationship resources to help regain their balance and avoid reactivity.

It is your job as a coach to be sensitive to the client's, the sponsors', and your own anxiety and face it openly. Much anxiety can be eased by your confidence and by progress on the engagement. Dealing with your own anxiety relies on reflection and self-management, two factors that are essential for anyone in the helping professions. Cultivate your awareness of anxiety in yourself and others and, with a little help from your friends, deal with it as a necessary part of every coaching engagement.

6. Leverage Feedback

Most of us operate with little useful feedback from managers, colleagues, customers, or even family members. Ideally feedback should be based on actual behavioral data from a representative sample, summarized to be descriptive, and offered on a timely basis. This may not sound that difficult but in fact it is, especially within organizations because they tend to be heirarchical and political. Getting an executive coach involved, however, vastly increases the likelihood of getting useful feedback. The transparency of the coaching contract, your integrity and credibility, the working alliance with the client, and your well-honed facilitation skills provide a foundation for gathering and leveraging feedback that cannot be easily matched outside of a coaching engagement.

Of course, that does not mean that clients will embrace the feedback that you so conscientiously gather. They are used to defending themselves against feedback that often is loaded with negativity. No one wants to be reminded of shortfalls or lapses. It is easier to avoid negative feedback or explain it away. Your job as a coach is to use your special relationship with clients to make feedback clear and useful for development planning. You are well positioned to help clients listen to feedback, explore emotional reactions to it, and keep the focus on learning and future improvement. The gap between a client's intentions and others' perceptions may be large or small but it is never uninteresting. Helping clients work through feedback opens up new possibilities for developmental action and growth.

Whether you help clients prepare a written development plan or something less formal, feedback is the raw material that you and the client will distill into themes covering both strengths and possible development areas. Those themes can be combined with previously facilitated self-insight and ideas to yield a comprehensive list of strengths to continue leveraging and a short list of areas to actually work on. I am guided by the *Rule of 2 or 3.* It is not unusual for a client to want to pile too much into a development plan. Part of our job is to pare things down into two or at most three development goals that are high priority and actionable in the client's context.

One more point about feedback: As mentioned above, as a coach you have unique advantages in both gathering and summarizing feedback. You have the client's best interests in mind and you have the integrity of your role to help other people feel safe to open up and speak honestly about the client. In framing the process in this way, the feedback needs to belong to the client exclusively. In my view, turning feedback into a document shared with sponsors changes the very nature of what we do as coaches from developmental to evaluative. Furthermore, doing so would require some unsettling fine print in contracting with interviewees about who receives their feedback. A coach's emphasis is on the client's growth, not on evaluations handed back to management. Mixing the two will yield a muddy process that in the end will satisfy no one. Clients and sponsors do engage and collaborate around a sharable development action plan, so let us keep the earlier feedback step confidential and safe to get the most out of it. In my experience, much more detailed and resonant development plans come out of a process that values feedback in that way.

7. Convey Confidence Along With Humility

As I think back on when I have done well or poorly as a coach, it often comes down to whether I had enough confidence to be truly humble and did not need to feed my ego. Not seeking validation, credit, or even acknowledgment is a challenging part of being a coach. You want the client to be at the center of the engagement and receive whatever praise may be had for making positive changes. Said even more directly, you should not have a personal stake in the choices your clients make or even in the outcomes of your coaching engagements. Of course you want them to do well and you care when they stumble, but you must be vigilant to avoid mixing in your own needs: for a positive evaluation from HR, for a case to go smoothly, or to do the next case that the sponsors are considering. Coaches are catalysts in the process of growth, experts in helping clients make fully informed choices. Confidence in the coaching process must have deep roots so that you can weather slow or nonlinear progress that may frustrate sponsors.

It is difficult to pin down what creates a feeling in clients that "this coach can help me." Certainly part of it is conveying your competence to manage the coaching process. That does not mean you can guarantee outcomes or results, to the individual or the organization; there are too many random variables and unexpected twists and turns to guarantee anything in life, let alone that a client will change in ways desired by sponsors. Even with those uncertainties, you can feel confident that you can implement a robust process that has a good chance of being helpful.

Focusing on managing the process also helps foster humility because that implies acceptance that there is only so much you can control. Newer coaches struggle with finding the balance between "I'm new at this, so don't expect much," versus "I'm the expert and so I am in complete control." Obviously experience helps with both confidence and humility, but from the start you can indicate your knowledge of coaching and the steps in an engagement, as well as demonstrating personal characteristics that support your credibility; taking the initiative, conveying a positive spirit, focusing on progress, being open and honest, showing empathy, and in general being an active, optimistic presence without providing many answers.

Internalizing confidence and humility is part of creating what I call a *personal model of coaching* (Frisch et al., 2012). Writing a personal model is a way to systematically think through your strengths applied to coaching and critically examine attitudes and beliefs that may get in your way. Another piece of your personal model of coaching is committing yourself to go out and get more coaching experience. Targeting certain sectors, honing your description of coaching, mocking up a contract (even for pro bono work), and completing other marketing tasks definitely build your confidence in advance. As you get more experience, your personal model will allow you to capture insights and learning so that you can continue to grow and develop as a coach. The irony is that the more you explore and deal with your own coaching frustrations and limitations, the more secure your foundation of confidence will be.

8. Toggle Between Internal and External Processes

Speaking broadly, there are internal processes taking place inside of you and your clients, and external processes taking place in the coaching engagement and the surrounding context. They influence each other and you need to tune into both when conducting EC engagements. Designing and leading the coaching process are what you are hired to do, so you must keep your focus on the steps just completed, the steps up ahead, and the need for any modifications along the way. There are also external processes in the client's context that may intersect with coaching: turnover, training, performance and talent management, organizational change, and so on. Just like driving down the road, you must adjust to twists and turns or end up in a ditch. Clients may not think to tell you much about the context because they live and breathe it, so you usually need to ask, leveraging your ignorance and curiosity.

Within the arc of a coaching engagement, there are many external subprocesses that are happening. Being aware of these is what I call *having an engagement mindset*. Too often coaches focus their attention on what happens within sessions instead of also keeping the flow of the engagement in mind. Examples of engagement subprocesses include the management of the flow of sessions in the overall engagement from initial meetings to closure, the shift in responsibility from you to the client, the evolution of goals from felt needs to ones that truly resonate with the client, the decisions of when and how to involve sponsors in development planning, and the determination of frequency of meetings, to mention only a few. These subprocesses require your attention at appropriate times during the engagement. I have found that coaches vary in their attention to them, often reflecting their own preferences and experiences rather than what is needed. Here, too, a personal model can help to highlight both subprocesses and contextual variables that you are less familiar or comfortable with so you can work on building your confidence about them.

Processes that are internal to you and to your clients are more difficult to label but no less important to the engagement. For clients, you need to tune in to their trust, openness, risk tolerance, resilience, learning, and other variables that are important in tracking reactions to the coaching and developmental progress. It is even more important for you to stay tuned into your own internal processes as you react to the client. Some aspects of the client and his or her behavior are likely to trigger reactions in you that you must learn to handle: personality differences between you and the client, the client's reluctance or distance, missed appointments or other evidence of low motivation to change, the client pressuring you for recommendations and answers, the client blaming others or not taking responsibility for actions, defensiveness in response to feedback, and so on. These are likely to trigger your own internal processes, but you need to avoid being reactive. These challenges are an important part of why helpers need to have colleagues who can act as discussion partners in an examination of their own reactions and in the selection of reasoned responses. You may have good insight into what pushes your buttons in daily life, but I guarantee being a coach will show you some new ones.

A specific example of the importance of tuning into internal processes is your use of self (Frisch et al., 2012). By this I mean paying attention to your reactions to the client's words and actions and then determining if and how to use those reactions with the client. A simple illustration of use of self is sometimes called *in-the-moment feedback*; this is when you call attention to something the client is doing with you, positive or negative, often conceptually tied to the development plan. It could be an obvious behavior such as pace of speech or flow of points, or it could be much more subtle or even odd, such as a feeling or an association you have in response to the client. Noticing your internal reactions and then deciding if, when, and how to use them with the client is a skill worth developing. Ironically, coaches are often taught to suspend judgment and be all-accepting. In my experience, using my reactions selectively but directly with clients makes for more impact and faster progress. Again, experience, reflection and confidence are important in refining your use-of-self intuition.

Because external and internal processes influence each other, you need to frequently toggle your attention between them. It is easy to get caught up in a client's current issues and frustrations but you also need to consider external processes in the client's context, as well as the effect of these on the flow of the coaching engagement. Heifetz (1994) has described this toggling for leaders as “getting on the balcony”; I believe the metaphor also applies well to coaches. You must switch between being in the action and observing the bigger picture. It is natural that you become very involved with your client but you also need to stay aware of and manage various external processes that are happening in the coaching engagement and in the client’s context.

The assumption that underlies leveraging both external and internal processes is that your helping effectiveness is tied to how you manage the realities of each case. You may be very experienced and capable of designing a detailed coaching engagement but it should fit the client’s needs and interests, even if that means making it simpler. You may have deep, psychologically sophisticated insights about the client but, again, only share what’s useful. Another way to think about this balancing act is as an interplay between hope and reality. You instill hope at the same time that you clarify internal and external reality. This is tricky but if you get good at toggling between internal and external processes, both hope and reality are activated. And the challenge of doing both stretches your own learning along with the client’s.

9. Choose Executive Coaching as a Career With Full Awareness

Being an external executive coach became my chosen vocation and it has both benefits and downsides. Not surprisingly, I am a bit biased toward the benefits.

Benefits. These are the positives of being an executive coach. It allows me to use my curiosity about, and enjoyment of, the world of work in organizations and more broadly careers. It provides opportunities for robust use of many aspects of my education and work experiences, including psychology, business, leadership, entrepreneurship, and consulting.

It makes it possible for me to work independently rather than in an organization. As is true of many consultants, I have an ambivalent attitude about structured systems: I enjoy studying and trying to understand them but I am not as keen on being a member of them (although I certainly have been). This appreciation of constructive marginality serves both me and my coaching. I enjoy a flexible, self-managed balance (not always equal) between my work and the rest of my life. I have a steady diet of interesting challenges. It permits me to be very selective about colleagues to partner with when projects require more effort than just my own.

Since EC is still relatively new, there are many opportunities to reflect about and contribute to the practice. As a lifelong educator, I can plow those contributions into teaching others about the practice or even inspiring them to join me in this field.

This work allows me, in fact requires me, to use my whole self in helping others. For me, there has never been greater satisfaction than that, and with coaching I even get paid for it.

Downsides. These are what I see as the negatives of being an executive coach: Self-employed consultants do not have an easy time of marketing, selling, being alone a lot, and managing work/life boundaries, and there is always the dreaded CFA.

These reasons also push most coaches to provide other services such as OD, HR consulting, training, therapy, career counseling, and so on. There is complexity to keeping these different services clear to you and to clients and avoiding confusion or mission creep.

As with all self-employment, taking care of yourself physically, interpersonally, and emotionally is an occupational challenge; in coaching not doing so is also a threat to your effectiveness. You have to be both serious and a little selfish about having resources that you can draw on and the courage to say “No” when business oversteps what’s right for you.

There is ambiguity about coaching in general and EC in particular, resulting in a constant need for explanations both broad and detailed. There are many choices for coach training in terms of focus, content, and delivery and most use a lot of hype about outcomes. It is definitely a buyer-beware situation in terms of coach training.

Similarly, credentialing is all over the board. Certificates of completion are not certifications to practice, but few understand the distinction and I do not see an easy path to clarifying that here in the United States.

Overall. The net for me is that, after working in business and consulting/training organizations for most of my career, being a coach for the past 15-plus years has been a very good fit. It has provided me with a clear professional identity in an emerging practice area within the wider field of consulting/IO psychology and the even wider field of applied psychology. I feel connected to all these levels at the same time as I am connecting to individual clients and sponsoring organizations. Certainly coaching is not right for everyone, but without a doubt it has taken its place in the last 20 years as a viable option for professional practice.

10. Conclusion: Stay the Course as You Evolve

In 2002, when I started to design courses about EC, one of the clearer decisions I made was that I was not going to teach others to coach like me, or anyone else for that matter. It may sound ironic but even new coaches have to find their own best ways to coach. My points of view, as expressed above, are ideas to be considered, tried on for size, and tailored to a specific coach’s approach but they are certainly not gospel. It would be easier to teach coaching if I could tell you exactly how to do it, but that would guarantee that we both would fail: My teaching would be mechanical and your learning would be narrow, neither one appropriate for the challenges of being a helper.

The organizing principle for my teaching, mentioned several times in this and other articles, is the recommendation that coaches work up their own personal models of coaching. Certainly your model will draw on the ideas of others, and I hope I have provided a few insights to think about, but in the end you have to show up as yourself if you are to succeed in coaching. You have to find our own posture, style, values, and voice in this role so that what you learn will mix with who you are to yield practice decisions that are uniquely tied to you and a specific client. Out of that mixture, I hope you come up with new and innovative ways to approach coaching that others can learn from; and so it goes.

Shaping a personal model is not an end either. All it does is provide a foundation from which to go forth and make informed choices. As those choices accumulate and are examined, a model will evolve. Often in the helping professions we are faced with a challenge for which there is no right answer, just multiple alternatives to choose from. These moments tend to be formative in the growth of practitioners, so capitalize on them in discussion with trusted colleagues or in more formal case-supervision sessions. Of course, reflecting on them in self-supervision is always valuable too.

EC is not a practice that fits into a 9-to-5 day. There will always be homework to do: processing what has happened in recent client interactions, reflecting on quandaries with sponsors, trying to resolve dilemmas in marketing efforts, and maybe thinking about the field as a whole. True professionals remain works-in-progress, integrating changes in context, the profession, and client needs. Maybe my one piece of direct advice is to embrace that change and fold it back into your coaching practice. I believe having an articulated personal model provides the foundation to do that.

Again, there is a parallel: Only if we figure out how to learn from our own experiences can we apply that to foster ongoing learning in our clients. Different from other corporate or organizational professions that have recommendations and answers, executive coaches have to model what they expect clients to do: Absorb multiple realities, bring their best selves forward, make choices, learn from those choices, and repeat. Without that iteration, your usefulness will be limited to what worked last year, which will have diminishing benefits to clients going forward. As a coach, you face a constantly changing context and client challenges requiring your confidence, perspective, openness, honesty, and especially your optimism that there is something better over the next hill. If you can, then your clients can, and vice versa.

I am sorry to put that burden on your shoulders but that is what you are signing up for as an executive coach. Being true to yourself at the same time as being aligned with a profession is hard work but for me it has been more satisfying than providing advice or making things happen directly. The benefits of being an executive coach, as summarized in Lesson 9, are for the most part modest, although a few coaches become famous and enjoy the trappings of overt success. For the rest of us, continually learning how to help each individual client is challenging and satisfying enough to keep us engaged.

Afterword
by Michael H. Frisch

We lost Bob suddenly on April 16, 2014. As those who saw him late last winter know, his mobility had deteriorated quickly. Many were shocked when he rolled into the Division 13 meeting in a San Antonio hotel on a motorized scooter. They were reassured, however, when the same engaging, sharp, and funny personality was evident, although from a lower angle. It was on that trip that he told me he had been invited by *CPJ* to write an article on his reflections about being a coach as a senior member of the field. I thought that was a wonderful idea but frankly I worried about how he would fit the writing into a busy schedule and clearly less energy. As we had done in the past, we devoted several hours to brainstorming ideas for the article, which I captured in a document and provided to him. Soon after, we were taken up with our annual coach-training program at Baruch College in New York City. My occasional inquiries about his progress on the article were answered confidently, but I did not see his work on it until several weeks after he passed away—one of many loose ends and unfinished projects that needed to be addressed. I estimate that he had drafted about 25% of the text as a more-than-annotated outline but many points needed to be fleshed out. I felt immediately that I could do that given my familiarity with his work and awareness of his intentions. More important, I felt that this article needed to be finished—for him, for the field, and as a way for me to honor our 12 years of collaboration. My goal in finishing this piece was to remain true to both his content and his voice, and that is why it is presented as a first-person narrative that focuses on capturing Bob's hard-won wisdom about coaching. In doing this, however, I was not sure how to characterize my contribution to the article. It did not feel right to present myself as a coauthor or as a ghost writer. After talking things over with Rob Kaiser, the Editor of *CPJ*, it was decided that it would be best to show me as a "with" contributor. I feel comfortable that this article is truly Bob's piece, and I would welcome your reactions to it. Or if, like so many others, you would just like to reflect on your special time with Bob, I would like to hear from you.

In Bob's original draft, he had noted acknowledgments to me and to the following other professionals: Steve Axelrod, Bob Berman, and Kate Edwards.

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