



Coaching as a Leadership Practice

Campaign Lab



ACKNOWLEDGEMENTS

We welcome your suggestions for improving this guide further for future trainings. We also welcome you to use it and adapt it for your own trainings, subject to the restrictions below.

This workshop guide has been developed over the course of many trainings by Liz Pallatto, Joy Cushman, Jake Waxman, Devon Anderson, Rachel Anderson, Adam Yalowitz, Kate Hilton, Lenore Palladino, New Organizing Institute staff, Leading Change Network, MoveOn Organizers, Center for Community Change staff, Jose Luis Morantes, Carlos Saavedra, Sean Thomas-Breitfeld, Shuya Ohno, Petra Falcon, Michele Rudy, Hope Wood, Josh Daneshforooz, Melanie Vant, Uyen Doan, Abel R. Cano, Voop de Vulpillieres, Ana Babovic and many others.

RESTRICTIONS OF USE

The following work [this workshop guide] is provided to you pursuant to the following terms and conditions. Your acceptance of the work constitutes your acceptance of these terms:

- You may reproduce and distribute the work to others for free, but you may not sell the work to others.
- You may not remove the legends from the work that provide attribution as to source (i.e., “originally adapted from the works of Marshall Ganz of Harvard University”).
- You may modify the work, provided that the attribution legends remain on the work, and provided further that you send any significant modifications or updates to the Leading Change Network at info@leadingchangenetwork.org or/and upload the resource to the resource center <https://leadingchangenetwork.org/resource-center-add-resource/>
- You hereby grant an irrevocable, royalty-free license to Marshall Ganz and the Leading Change Network, and their successors, heirs, licensees and assigns, to reproduce, distribute and modify the work as modified by you.
- You shall include a copy of these restrictions with all copies of the work that you distribute and you shall inform everyone to whom you distribute the work that they are subject to the restrictions and obligations set forth herein.
- If you have any questions about these terms, please contact Mais Irsusi, Leading Change Network, 30 Bow Street, Cambridge, MA 02138, mais.irsusi@leadingchangenetwork.org or Marshall Ganz, Center for Public Leadership, Harvard Kennedy School, 79 JFK Street, Cambridge, MA 02138 marshall_ganz@hks.harvard.edu

Modified by Ellen Holmes, 2023, Summer LCN Coaching Network

Why is coaching an important leadership practice?

Leadership in organizing is about enabling others to achieve purpose in the face of uncertainty. Coaching enables others.

Organizing campaigns are rich with challenges and learning opportunities, but sometimes we are fish in our own water and we cannot see the challenges we are swimming in. Coaching in organizing helps to alleviate this problem. Coaching helps individuals to overcome motivational, strategic, and informational challenges that might otherwise hinder the progress of the individual, and/or the team, and thus the campaign or training.

What is coaching in organizing?

Coaching is a direct intervention in an individual or team's work process to help them improve their effectiveness.

Coaching is a leadership practice that is useful in a variety of contexts in organizing campaigns and trainings. Some examples of when coaching skills are necessary:

- Helping an organizer overcome motivational challenges with their volunteers
- Assisting a leadership team in creating strategy for their organizing campaign

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Elements of coaching

Coaching requires learning to identify a person's or team's strengths and weaknesses to help them draw upon their strengths to overcome their weaknesses. People often know what they "should" do. But fresh eyes can help diagnose specific challenges they face while identifying ways to deal with them.

- **Motivational coaching (heart)** is intended to enhance effort.
- **Educational coaching (hands)** is intended to help acquire information or skills
- **Strategic coaching (head)** is intended to help evaluate how to use resources to achieve outcomes.

Coaching approaches

Corrective

Some coaching is aimed at helping improve poor performance (i.e., the coachee is overall not doing the leadership practice well and needs help getting up to a basic level).

Developmental

Some coaching is aimed at helping the individual achieve mastery (i.e., the coachee does the leadership practice well and is ready to become an expert).

Basic elements of coaching are the same (i.e., motivational, strategic, and informational), but coaching strategies may differ (e.g., consult by asking reflective questions to develop mastery vs. consult by providing expert feedback to illustrate errors in how they are thinking about the task).

Be aware this is not coaching...

Giving advice

Since good coaching should take a coachee beyond the limitations of the, coach, leader or mentor's knowledge it makes sense that your advice shouldn't be the golden tip. The golden tip is the one that the coachee will realize on their own that is even better than any solution that you could come up with. It is essential to avoid giving advice as a coach.

Leading questions

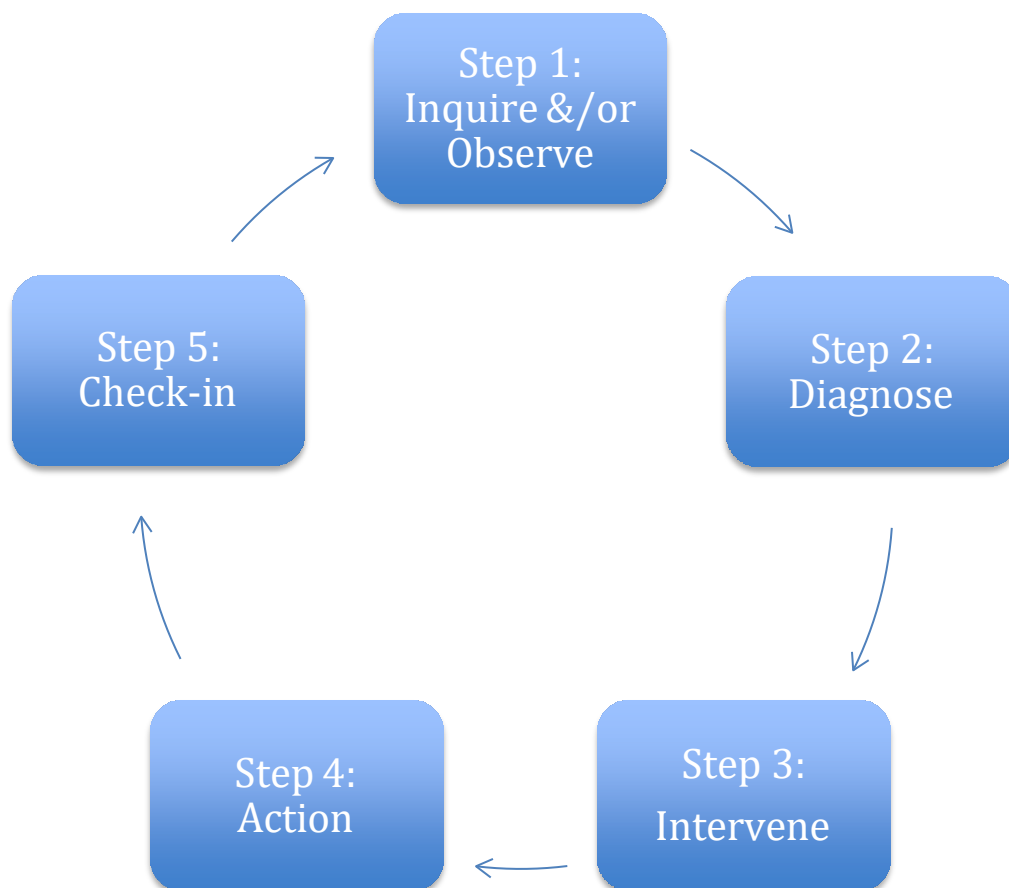
Leading questions is basically hiding your advice in a question format. If good coaching is all about asking the right question, that doesn't mean that ending with a question mark can make you get a way with an embedded advice in the question.

Examples:

- Have you tried to do xxxxxx?
- Will xxxx work in your situation?

Following this simple, 5 step coaching process can help you dive in and begin your coaching practice:

5 Step Coaching Process



1. Inquire &/or Observe - What do I see and hear?

When you are observing a person's actions in the field or someone comes to you for help, your first inclination may be to draw conclusions from the initial observations you make. As a coach, you need to take time to dig deeper. Are you seeing all the angles here? What information is missing? Think about the "who, what, why, how, where, when" questions.

- **Motivational (heart):** Is the individual struggling because s/he is not putting forth enough effort? Is she not trying hard enough because she's embarrassed? Is he quitting too soon because of frustration or fear?
- **Strategic (head):** Is the individual struggling because the goals are not achievable? Or because they're not thinking creatively enough about how to use the resources they have to meet goals? Or because the overall strategy doesn't make sense and needs to be clarified or adapted to their situation?
- **Skills-based (hands):** Is the individual struggling because of not being able to muster the behavioral skill to execute effectively? Does he not have the skill in his repertoire? Is he getting interference from other habits and behaviors (like someone well-versed in marketing speak may think that skill set is a substitute for authentic story-telling skills)? Is there something you could model, or that this person that just needs more help practicing and debriefing?

2. Diagnose & 3. Intervene: Which form of coaching does this require? How will I intervene?

		
If your diagnosis is that the individual needs to put in more intense effort, choose a <i>motivational</i> intervention, – for example:	If your diagnosis is that the individual is not <i>understanding</i> the focal practice adequately, or thinking about it appropriately, choose a <i>strategic</i> intervention – for example:	If your diagnosis is that the individual lacks <i>execution skill</i>, choose an <i>educational</i> intervention – for example:
○ Encouragement and enthusiasm—you can do it! ○ Helping the individual understand and confront fear, embarrassment, or other emotions that get in the way of the willingness to try harder or persist in the face of setback ○ Incentivizing, rewarding and praising courage ○ Modeling courage and emotional maturity in your own behavior, confessing fear and explaining how you move toward it rather than away ○ Kick in the pants (offered with love) ○ What else?	○ Asking good questions about how the individual is thinking about the key leadership practice – “Why did you choose to do this and not that?” – Based on where you are now what resources could you draw on to take this story/team/strategy to the next level? ○ Offering your assertions about what you are observing and how you think the individual might fruitfully think about the practice differently – “When you stop at that angry point in the story, I think you may be forgetting that your listeners need a reason to hope in order to be called to action.” ○ Offering the opportunity for silent reflection and self-diagnosis – “Why don’t you take a moment to think through what you believe is working and not working and let’s talk about that?”	○ Model the behavior and invite the coaches to imitate you or work side by side with you to get the “feel” of the activity ○ Break it down into smaller parts and invite the individual to try one at a time ○ Practice, feedback, repeat ○ Offer three or four different practice exercises and observe which ones “take” for that person ○ Repetition, repetition, repetition ○ What else?

3. Intervene – What do I do?

Once you think you've figured out what the problem is don't just tell the coachee what you think they should do! Find out what they think they should do? Ask questions that enable the coachee to see the problem, and for you to see how the coachee sees the problem, and discern a way to solve it. Get the coachee's views out on the table. The appropriate intervention depends on the diagnosis.

If the challenge is **motivational**, you can:

- Encourage and exhort—you can do it!
- Offer a kick in the pants (with love)
- Help the person confront his or her fear, embarrassment, or other emotion that may get in the way of their ability to risk acting, persevering, trying new things. Communicate with empathy, hope, and affirmation of the coachee's self-worth. Reward and praise courage
- Model courage and emotional maturity in your own behavior confess fear and explain how you move toward it rather than away from it.

If the challenge is **strategic**, you can:

- Work through a specific example with the person, asking questions to guide the strategic process. Then reflect on the process itself, asking them to describe how it worked?
- Ask questions about how the individual is thinking about the practice ("Why did you choose that tactic?")
- Offer your observations, asking how the person might think about it differently ("At that point, were there other options? What might they have been? Why did you choose the one you did?")
- Offer feedback on what you are hearing, asking if that describes the situation, at the same time, offering possible reframing of it.

Use silent reflection and self-diagnosis ("Why don't you take a moment to think through what you believe is working and not working and let's talk about that?").

If the challenge is **educational**, you can:

- Model the behavior and invite the coachee to imitate you to get the "feel" of the activity
- Break it down into small parts and invite the individual to try one at a time
- Offer three or four different practice exercises and observe which ones "take" for that person.
- Suggest others with whom the person can practice.
- Suggest ways to figure out where to find the missing information.

4. Action: How can I allow the coaches to develop their leadership skills?

What action will they take that would allow them to move forward?

- Avoid the urge to do it for them.
- Allow the coaches to try the intervention.
- Observe them in action and note observations for your debrief.

5. Check-in and Debrief: What do I ask the coaches to help them reflect on their experience?

- What went well?
- What are you challenged by?
- What are some possible solutions?
- What are your goals/next steps?
- Schedule periodic check-ins to support your coaches in integrating this new or revised solution into their regular practice.
- Find out from the coaches how the situation has changed.
- Assess whether the diagnosis and intervention was successful. Celebrate success!

Coaching is useful whenever we are working to enable others to build their own capacity to act, and though the contexts vary, the process is very similar throughout.

Effective Campaign Coaching Is	Effective Campaign Coaching Is Not
-Showing up and being present to another person's experience and listening, with both your head and heart	- Being so prepared that you figure out all the answers for the coaches before you even hear or observe their challenges
- Helping the coaches explore and make sense of their challenges and successes and what they learned from it all	- False praising of the coaches or only focusing on their strengths because you do not want not to hurt their feelings
- Helping the coaches to find solutions to challenges	- Solely criticizing the coaches for their weaknesses
- Asking questions that both support and challenge the person you are coaching.	- Telling the coaches what to do

Coaching Cycle Scenarios

Below are 4 scenarios, you have been provided enough information for **Step 1: Inquire and/or Observe - What do I see and hear?** of the coaching cycle – and you are free to use a little imagination to round out the scenario. Your task is to determine what kind of coaching they need – **Motivational, Strategic, Skills-based**.

Scenario 1: The context – You are preparing leaders to get over the anxiety that most of us feel when we ask other adults to do tasks that might not be enjoyable.

This is a group of local leaders that have secured member volunteers to run a phone bank asking for campaign contributions for a school board candidate's campaign. The leaders are scared of hearing no's from their colleagues on the phones and are a little by the growing "clarifying questions" coming from their volunteers. Ultimately, they feel they should just scrap the whole thing because they are not confident that the volunteers will show up and they are sure they won't raise much money.

Type of Coaching: _____

Scenario 2: The context – You are facilitating the goal setting of a leadership team struggling with common understanding of what their campaign should be able to achieve.

The team members have a wildly divergent notions of what the outcomes should be and they keep shying away from setting a goal and straying into thinking about "cool" actions they could plan. It appears to you that they may not have run this kind of meeting before and they may not understand how to develop a plan for action.

Type of Coaching: _____

Scenario 3: The context – You are debriefing with a leader who has not kept a commitment.

The leader is relatively new and quite a bit younger than others at the worksite – but has good relationships and is well respected. The commitment was a relatively small one that was dependent on using already established relationships – a.k.a. "ask five friends to..." You get the sense that this leader has not taken this commitment seriously at all.

Type of Coaching: _____

Scenario 4: The context - Helping a leader overcome motivational challenges with managing other members across several worksites who are supposed to be making a face to face contact with each employee in the worksite to update contact information and establish a basic presence in each worksite.

The leader is having difficulty keeping the teams to following the protocol of relationship building – various teams are reverting to – " place a notice in the mailbox" – send a broadcast email – or are leaving it to one person at the worksite to do alone – or are not doing it at all. The leader has been shy to redirect the teams to the protocol of face to face contact and feels that it is "not their place" to question if other adults have kept up their end of the work.

Type of Coaching: _____



The Craft of Coaching

The Craft of Coaching Includes the following:

- Questions vs statements
- Guideposting
- Emotional presence
- Holding authority
- Soccer vs ping pong.
- Strategy is also a fundamental element of the craft -- that is, choosing which content area you will dive in on.

Questions vs. Statements

- *Why are questions important?* – They allow the person to consider their own situation. They are engaging in reflection and the cognitive challenge of seeking solutions.
- *What do questions do for the coachee that statements can't?* – Statements are from the “other person’s” perspective. They are directive and from a position of expertise. Questions allow the person to use their agency to commit to act in the process of problem solving.
- *How might you as a coach strategically use questions to your advantage?* – Coaches use questions to discover the other person’s context, to help them see their role in the change they want to take, to help the person discover the resources they need. Questions keep the focus of developing power on the person and prevents the coach from becoming an actor in the change.

Guideposting

- Let's the coachee know where they are going before they get there
- Be explicit about what you are intervening on

An example of this is saying directly, "I don't see any assessment of how you are planning to center equity within your leadership team." Then begin asking about their process and thinking around this "guidepost."

Emotional Presence

- This is the practice of the Coach modeling vulnerability in their own campaign work
- The coach holds tensions in a productive way so that learning can happen

This might look like the coach leaning in, and pausing after an emotional response. It can sound like a coach saying simply, "I feel that with you."

Holding Authority

- Tight leadership and focus - Keep the coachee on topic and answering the question you asked them to answer.
- Your role is to challenge AND support – Be direct. You are not coaching with love if you can not be precise, succinct, and direct in your questions and assessment.
- Keep time and Interrupt Productively – Time is a matter of equity. Hold coachee and yourself to the time set for the meeting. Don't be afraid to interrupt when the coachee is wandering away from your questions or the tasks of the meeting.
- Hold coachee accountable – Leaders are accountable for their commitments.

Soccer Vs. Ping Pong

- Soccer = Group Facilitation: Engage the whole group to reflect, resonate, and coach one another.
- Ping Pong = One-on-One Deep Dive: Use focused back-and-forth to explore vulnerability or key insights with the coachee.
- Be Intentional: Use clear, purposeful questions to guide group (soccer) time effectively.
- › **Balance Both:** Strategically alternate between soccer and ping pong to maximize group learning and individual growth.



Coaching Techniques

Coaching technique: Active listening

What is it?

- pro-actively look and listen for what someone else is trying to communicate, while trying not to project our own thoughts and expectations onto them.
- Normally our understanding of a conversation is coloured by our own interpretations, experience and point of view. Our subjective view of what we've just heard might differ significantly from what the speaker wanted us to hear.
- we can come to understand how the speaker feels about a subject or situation.
- we hear through their words and tune into their underlying emotions, concerns and tensions.
- we can help the speaker formulate their thoughts and reassure them they are being listened to.
- shows the speaker that we respect and value them and what they have to say.
- allows us to focus on the core issues of a person's message and to understand them better as a result.

How to actively listen?

- Create a safe atmosphere for the speaker
 - Find a suitable space and deal with any distractions (turn off mobile phones, televisions, computers etc).
- Make any limits to your listening clear from the start
 - if you've only got a certain amount of time, say so.
- Show that you're listening
 - Signs of listening are
 - leaning toward the speaker
 - an interested facial expression
 - maintaining good eye contact
 - Facial gestures and small movements such as nodding our heads can show interest and support.
 - Avoid signs of impatience such as looking at your watch.
- Make the mental space
 - Don't think about what you want to say but focus on your speaker.
- Use verbal cues
 - (questioning techniques) to draw out your speaker's thoughts
- Summarise and restate what's been said.
- needs constant practice

Coaching technique: Mirroring- reflecting back

Mirroring is the technique of reflecting back the EXACT WORDS that the coachee has just said and then leaving a room for silence. Hearing someone's words in another person's voice is a good way to hear yourself and build your thoughts further. It's a very powerful coaching technique that can let the other person reach a clearer place without having to do much effort as a coach.

Coaching technique: debriefing -Summarising & Restating

- After listening to someone we can offer them a short summary of what we've heard.
- This is a way to show that we've listened
- This is a good way to check whether we've understood them.

How to:

- Wait until the speaker has finished
- Offer the summary tentatively
 - If we restate in bold terms such as: so you feel that... and we're wrong, not only do we show we haven't been listening, but we risk offending the speaker by misrepresenting them.
 - Better examples are:
 - You seem to feel that...
 - What I hear you saying is... is that right?
 - Would it be fair to say that you feel...
- Summarise succinctly
 - Boil things down into one or two short sentences.
 - This is essential if your summary is intended to clarify the situation and move a discussion on



The Art of Questions

Open questions

- Longer reasoning or answers.
- TED:
 - Tell, Explain, Describe.
- Good for:
 - Open conversation
 - Detail.
 - Opinions, issues or experience

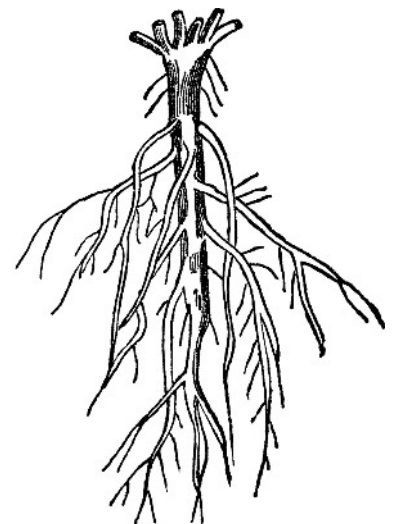
Closed questions

- Reduces options so as to receive a single word or very short, factual answer.
- Best avoided when a conversation is in full flow.
- Good for:
 - Check understanding.
 - Concluding i.e. a discussion.
 - Setting a frame i.e. introducing an issue.

Probing

Two step process:

1. Limiting scope
2. Asking an open question within that scope.



Funnelling

Refers to a sequence of specific questions that narrows down to a specific answer:

- What, where, with whom, why, when (often with use if some closed questions).



Refers to more of a sequence of questions

Appreciative inquiry

Ask questions based on people's own experience like:

- What have you experienced before that worked?
- What successes have you experienced ?
- Have you experienced a similar situation before? How was it?
- If you are to give yourself an advice, what would it be?
- From where do you get the courage and patience to continue?

Reality check

Coaching questions that helps better evaluate the situation accurately and helps see the positive side. Since often times few bad incidents can make us feel bad, and its good to have REAL sense of the problem. Also based on other historical experiences people can feel too effected or less affected about certain things.

Questions that can put numbers on challenges and measure quantitatively and not just qualitatively.

- So we are talking about the challenge of X, how many incidents/ people are we talking about from how many total?

Questions that can shed light on the half full of the cup to see the positive side not just the challenge to enable possibilities of solutions there:

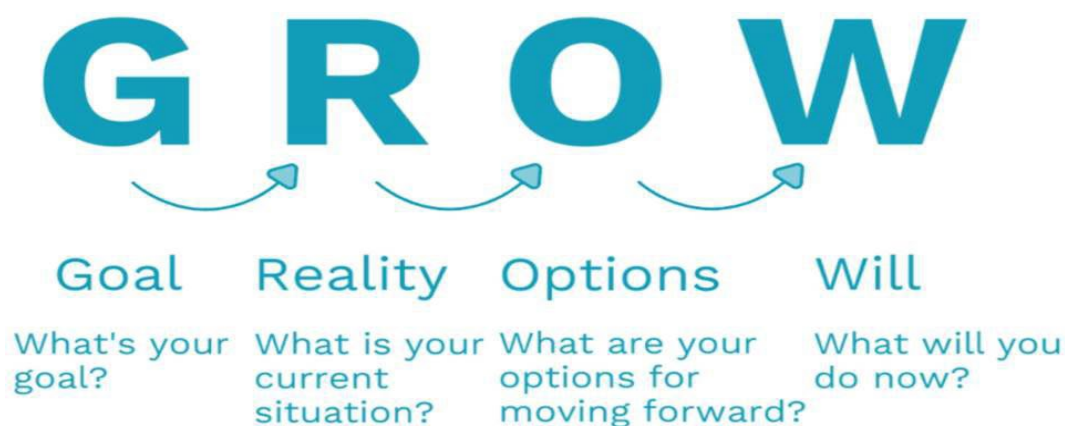
- You are sharing the challenges when it come to X what do you consider a the success or strengths of X?

What if questions

What if questions open a light of possibility in the coachee's mind, for them to be able to see beyond the challenge. Examples:

- What if everything was possible what would you do
- What if you could make any decision, what would be your choice
- What if that xxx challenge was not there, how would things be different.

The GROW model of coaching - *by Sir John Whitmore*



GOAL- Setting a goal for the session is important to create focus on defining the challenge and an achievable goal in the duration of the session.

REALITY: checking to explore the current situation, and context to be able to diagnose the challenge better.

OPTIONS : and alternative strategies or courses of action. In good coaching sessions the coachee arrives to their options naturally in the good time for them. Not lead by coach.

WILL: or what is to be done, when, by whom and the will to do it.

Sources

LCN organizing guide developed by Marshall Ganz and his associates- updated by Benedict Huggoson.
Coaching for performance - Sir John Whitmore