Routledge
Taylor & Francis Group

Coaching is the ultimate customizable solution: an interview with David Peterson

Carol Kauffman and Tatiana Bachkirova

Dear David
You have been a true pioneer in the coaching field from 1990 to the point of being Senior Vice President at Personnel Decisions International. Your substantial contribution to this field includes many articles and best-selling books on coaching such as *Development FIRST* and *Leader as Coach*. We also know about your valuable PhD study in which nearly four hundred business leaders were rated by bosses, self, and coach before coaching, after coaching, and 1–2 years later. Amongst many other important features this outcome-study included experimental controls (people were rating non-coaching items about the person). We know how committed you are to making coaching as efficient as possible and we believe that our readers would love to know more about your thoughts on this.

Keywords: coaching framework; insight; behaviour; outcome; conditions for learning; experiment

Q: David, could you describe first how you became a coach?

Completely by accident. In 1985, I joined PDI (Personnel Decisions International), which had started an executive coaching program in 1981. It was really the first company to do that. When I started I knew nothing about coaching: it didn't exist as a profession. I just ended up at the right place at the right time and was given opportunities to start coaching. My PhD was in counselling psychology and organisational psychology, and working with the individual inside the organisation was a nice blend of both disciplines. It was a perfect fit for me.

Q: Can you sum up what PDI is?

PDI started in 1967 as an organisational selection and assessment company in Minneapolis, Minnesota, and over the years it expanded into a full-scale human resources consulting firm. It developed some of the first 360 surveys and was one of the first to do assessment centres. It is a leader in many areas of executive coaching and leadership development in the US with thirty-some offices around the world. I've been the head of the coaching practise since 1990, so I've been training coaches and thinking strategically about

*Corresponding author. Email:

coaching for a long time. It's been a great platform at the centre of much of the growth of the industry.

Q: It seems that you are one of the pioneers in the field of coaching. Could you tell us how different you are now as a coach from when you started?

When I was learning to coach, we were exploring what it is in many ways. To some extent we invented it as we went along. We developed a strong procedural approach: First you do this, then this, then that. Many coaches operate that way today – if they have a process, they work the process. The main change in me as a coach is that today I make deliberate choices about what I do and when, based on the person and their needs rather than on a pre-designated process. Most of my coaching is based on where the person is right now and what will be most helpful, rather than on following any particular process. I figure out what our fundamental goal is and what's the most powerful thing I can do to further that goal.

We used to do a thorough assessment up front: a background interview, psychological testing, maybe cognitive-ability testing. Now I sit down with the person to determine what they need in terms of assessment or needs analysis. If they come with a clearly defined and well-understood issue, I dive right in. For most coaching, we have six months to gather information about the person, so I have plenty of time to get whatever data I might need later. If we want a personality or interest inventory, or cognitive-ability testing, we have six months to do that. Before I start coaching, I just want to have enough data to begin – and rarely does that require a one-hour background interview. If, however, a client wants me to understand their history, I listen and ask questions about their story. It's designed around what the person needs, not what the process is for me.

Q: Do you think that that's more of an emergent process than a structured one?

Absolutely, but there is a science behind it, beginning with the Development Pipeline – my label for the necessary and sufficient conditions for behavioural change. If these five conditions are there, people will make changes and improve their performance and results.

1. Insight – do they know what they want to get better at and where improvement will make a difference?
2. Motivation – are they willing to invest time and energy to accomplish those results? Do they see the personal payoff?
3. Capabilities. Do they have the skills and knowledge to make the change?
4. Real World Practice – do they experiment with what they know in a real setting to break down old habits and build new habits?
5. Accountability – do they stick with it, and are there meaningful consequences for making the change?

I try to identify where the constraint is in their development pipeline and then the coaching revolves around where there is a bottleneck.

Q: What is your meaning of 'insight', or that first part of the pipeline?

Insight has a general sense – how well I know myself and what it takes to be successful in the context I work in – and a specific sense – how much insight do I have around any specific topic. Some people have great insights about their work relationships but no clue when they go home to their spouses. Some have great insight on their technical capabilities

but weak insight on how they come across to people. As we work, insight usually increases. For example, take a client who wants to improve their strategic thinking in order to get a promotion to a more strategic leadership role. I usually begin very simply, helping them think about this from a different frame of reference by asking, 'What would you do if you were CEO of the company?' They might say, 'I would look at our offerings to the midmarket and midsize companies. We have great offerings for small companies and enterprise organisations but not our midmarket.' Given your role, I ask, what can you do now? 'Oh, I could do this and this', they say. Now just with that question, they're thinking strategically about how to make their organisation more competitive. It's a practical way for clients to look at themselves differently and gain insight about what they can do. In this case, starting with some simple insights and skills builds momentum, which facilitates motivation. We want a practical plan for clients to experiment with in the real world, which leads to new challenges. My client might then ask, 'How do I get people to support my ideas?' Even if the initial goal is to improve strategic thinking, we often work on half-a-dozen different topics because issues are interconnected. Strategy requires motivating and influencing others, new ways of looking at issues, change management. As we explore and bounce around the Developmental Pipeline, clients almost always gain new insights, regardless of what we're working on. However, if they get stuck on insight, we might consider more assessment. Whatever the constraint is, I try to zero in on what will work best for each person at that moment. So my coaching is much less of a sequential process. It's still driven by a framework, but it requires constant attention and adaptation. The result is, though, much greater impact in much less time.

In coaching, the exciting burst of insight is only the first step toward change. I used to love these moments. Now I think: this is where the real coaching begins, when clients understand what they need to do, they begin the work. What is more important is how will they do things differently? Do they see tangible outcomes from insight? How will they make sure they stick with it? This leads to transformation in the person. Insight is a booby prize if it does not translate into action. I care far more about what happens outside a session than in it. That's where the results of effective coaching are demonstrated.

Q: What do you think are the most common mistakes or misperceptions about coaching that are still apparent in this field?

Many coaches fall in love with their tools – particular instruments, surveys, or models – and they use them with all of their clients in the same way. I tell my clients there are a hundred ways to gain insight, to learn skills, to build accountability. Let's find one that works for you. It is critical for coaches to have a big tool kit that includes a variety of tools, models, and methods to help clients accomplish their goals. With these tools, you can tailor coaching to your clients needs. Coaching is the ultimate customizable solution because it's delivered one-on-one, yet clients often receive standardized offerings because of a coach's preferences, not their own needs. Some organizations hire coaches and manage the process too tightly; they over-engineer and commoditise coaching by, for example, dictating that everybody gets eight hours or 20 hours of coaching. But some people don't need coaching at all, some need two or three hours, and some may need forty hours. Eight hours may not work for everybody. So the question is how can you do a large-scale implementation of what is fundamentally an individually customized solution? How do you manage and monitor that, and ensure quality? I consult with organisations to help them design their coaching programs. We figure out the optimal design by making thoughtful choices around who gets coaching, who provides the coaching, what the process looks like, how is it

evaluated, and what other organisational roles and supports are required. You can have some standardization – for example, requiring written objectives approved by the person's boss – but still allow the individual tailoring that provides value.

Q: How do you go about customizing the coaching you offer?

By 1993, I had coached about 300 managers and found myself getting bored. My clients would tell me they were the most unique people in the world and that no one understood their context. Meanwhile I thought, 'This is scenario 27 and in 45 minutes you'll say this and we'll do this'. I realised I couldn't continue like that. One day I was coaching an executive in the computer industry, where the technology was constantly evolving – faster, cheaper, better. I thought why isn't that true in coaching? I decided to pursue that same goal, to make my coaching faster, cheaper, better, and more rewarding for me and the client every year. That re-engaged me. I stepped back and asked myself different questions about the process. For example, is an hour-long interview the most powerful thing I can do to start the coaching process? Do I need a standard intake or assessment process? I started experimenting to find out. I quickly discovered one of the most helpful tools I've ever learned: asking clients what would be most helpful to them. Probably only two or three people out of 500 wanted to tell me their life history. Others might want to tell me about a critical event that occurred five years ago or about a significant boss they had, but in general they all wanted to get to work on their goals. What I moved to is discussing what really mattered to the client and then working on it, so they could have immediate value from it. When more information was necessary, we explored it when it was most relevant.

In coaching workshops, I ask, 'How many of you have a problem getting your clients to come to a second meeting?' Sometimes it's 80%; sometimes it's 100% who raise their hands. I no longer have that problem in my coaching, and I think it's because of this shift in my approach. My goal is to make sure that if our meetings are interrupted after a half hour my clients have already obtained so much value that they are anxious to return for more. Once I had a three-hour session scheduled with a CEO of a midsized company. After 50 minutes he said: 'if we had to end now, I'd be completely satisfied'. That is the goal – that they see the value quickly. When I started coaching, I was concerned about having a 'great coaching conversation,' and I wanted clients to think, 'Wow, David is a great coach'. Over time my focus shifted completely. Now I care about how making sure my clients know exactly what they'll do to be more effective and are committed to doing it.

Q: Can you explain a bit more about that?

If we think about the developmental pipeline, the person may need insight, but also motivation, capabilities, real world practice, and accountability – insight is only a beginning. The 'transformation' moment may not have a long half-life. I often see self-development junkies, constantly waiting for the next big 'hit'. And coaches who love the moment of glory when that happens, too. What's seductive is that people will be very appreciative and give their coaches credit for facilitating new insights. But the real work is what the person actually does with it afterwards. To achieve that the coaching session itself might be less exciting, and it's slower and more tedious and the client has to do the hard work, so the coach gets less credit. But the tangible outcomes are when clients actually take what they learn back to their work lives and do something that makes a difference. That's what counts.

Q: How do you achieve that?

I'm concerned about the transfer of skills to the real world. It's easy to learn new skills during training sessions. In that context clients are being prompted, it is an emotionally neutral setting, the coach is demonstrating and shaping and encouraging specified new behaviours – but none of that happens in the real world. There people have multiple agendas; it's emotionally hot. There may be little time to think, and no one rewards the clients for trying out the new behaviour.

Optimal learning is not like optimal living; they happen in different environments. We must teach skills in contexts that replicate the messy complexity of the real world. For example, I may ask my client to start asking open-ended questions and then continue our conversation as usual. Five minutes later I challenge them because they have not asked me even one open-ended question. I say, you have to take responsibility to figure out when and how, I'm not going to tell you. That recreates the conditions that are similar to the real world.

Q: How else do you do to make coaching more like the real world?

In real life clients use many skills at the same time. For example, they must articulate goals, ask questions, listen to the answers, and solve problems. Will clients be able to do this in the real world? We practice scenarios drawn from real challenges they face, where they are expected to manage their emotions, demonstrate new skills, and move the agenda forward, while at the same time I am trying to push the difficulty level to the very edge of what they can handle. That's where the real learning occurs. Yet a coach must balance challenge and support, so I embrace the 'good enough' principle. I don't expect them to perform everything perfectly. Elegant mastery is not necessary; rarely does the ability to demonstrate sophisticated listening skills add incremental value to a leader. Peter Drucker noted that listening is not a skill, it is a discipline – all you have to do is keep your mouth shut. For some leaders in some settings, that's good enough. So I try to find out, what level of effectiveness is good enough for their world? A mediocre skill that someone uses to their advantage is better than a well-polished skill they only demonstrate to please their coach.

Q: What do you feel are important areas for coaching research?

It's fair to say that we have clearly established that coaching works. So the most important research now is to examine what highly effective coaches do differently from less effective coaches. We need to discover what the quickest and most effective approach is, and who gets results quickly? What do they actually do in a session that produces results? Who gets great ratings, and what are the most important elements of their approach? I'm interviewing coaches and their clients for a study based on the development pipeline. We ask clients if they gained insight, motivation, skills, etc., and what they attributed that to. What did the coach do that produced that outcome? We're also asking the coaches if they see changes in insight or motivation, for example, and what they think they did that generated that impact. We are trying to link specific behaviours with specific outcomes and see if coaches and participants have the same perspective on what happened as well as what worked.

There are several related challenges in coaching research that have been largely ignored. First, part of the reason that coaching works overall is that coaches have multiple methods and repeated opportunities to achieve results. To increase insight, for example, coaches can give immediate feedback, give feedback from others (e.g. 360), ask provocative questions to

stimulate reflection, ask clients to try something and watch what happens, and so on. Coaches can also offer the same feedback in different ways, and repeat that feedback over the course of an hour or even in different sessions. So even if we know that insight was increased, we don't really know what caused it – was it the fifth action or was it some combination or was it the result of the total process? And coaches may not even know what worked, so self-report isn't necessarily reliable.

Another challenge is that many things a coach does seem to work and so coaches continue to do what they've always done. But few seem to systematically experiment with ways to improve their own coaching, and so we really have little insight into what works best under what conditions. For example, some coaches always use 360 surveys, because they're often useful. But I'd like to see research that examines when they're really useful, when they're a waste of time, and what value they provide for different types of people and situations. For me, the key question is not just 'does it work?' – which seems to satisfy many people – but what is the quickest and best way to accomplish our goals?

Q: What is the last word you'd like our readers to hear?

For the long-term success of the field we need to educate consumers on how to find the right coach for their needs and how to use their coach effectively. It would help to have a taxonomy to classify the different kinds of coaches and the different kinds of value they provide. Emphasising certification is just the beginning. We need clear skill sets for different kinds of coaches. Saying 'I'm a qualified coach' is like saying, 'I'm a qualified surgeon'. Qualified for what? Would you want an orthopaedic surgeon operating on your heart?

Notes on contributors