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Alignment Coaching: The Missing Element of Business Coaching with Commentary

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Alignment Coaching: The Missing Element of Business Coaching

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*Coaching in organizations often focuses on either how to address issues effectively or how to perform well in a situation, given a decision to move forward and a strategy to meet success criteria. Sometimes these interventions will prove ineffective. There is, however, another possible focus of coaching, one that confronts making sense of one's life and the fundamental values and meaning that get expressed through choice and action. This is **alignment coaching**. This article offers a fresh perspective on business coaching, distinguishing alignment coaching from its **performance** and **executive** coaching brethren. Using a case study illustration, further distinctions are drawn about the types of issues clients face and the type of business coaching that, when matched, can provide 'best fit' to achieve desired results.*

PROLOGUE – IN THE BEGINNING

Consider this hypothetical situation. Sue Gladstone serves as department head in a contemporary corporation. Sue is confronted with a set of issues. Each issue is seemingly nested in another set of issues. At the heart of the matter is a difficult decision that Sue must make regarding the performance of Peter, her trusted colleague of more than fifteen years at the Exemplar Corporation. Peter's level of work has always been outstanding; however, in recent months Peter's performance has dropped off in both quality and quantity. Given that Peter is a long-term employee, respected by younger members of Exemplar, the impact of his poor performance is widespread and potentially quite damaging to the company.

The issue is compounded not only by Sue Gladstone's close working relationship with Peter over many years, but also by the fact that Peter has been distracted from his work by the deteriorating conditions of his wife, Gwen, who is dying of breast cancer. Sue grieves for Peter and Gwen, and very much understands why Peter leaves work early, why he often fails to return phone calls to his customers, and why his orders are often incorrectly submitted. Any wonder, given the horrible conditions he is confronting at home. Yet, Peter is in a critical position at Exemplar. He can't easily be replaced or given a leave of absence. His performance must improve immediately; otherwise, Sue and her department are in trouble.

Sue wants and is in need of coaching. Her coach can be of great assistance in formulating a plan for confronting Peter with his performance problems. Sue wants to be supportive and understanding, yet clear and compelling. When does she meet with Peter? What, specifically, should be the agenda? How, in the midst of these problematic times, does she find something to tell Peter that can be reassuring and truly helpful to him? This is coaching that focuses on decision-making, on strategizing, on "thinking through" a process and its underlying assumptions.

There is also a second type of coaching that Sue might find to be of value. This coaching concerns her personal performance—namely, preparation for the actual meeting with Peter. What specifically should she say to Peter? What should she do if Peter becomes highly emotional or depressed or resigned to his unfortunate fate? How does she talk to

Peter in a way that preserves their long-term relationship, while also respecting their formal reporting relationship? This form of coaching focuses on enactment of a decision or strategy. It is coaching that takes place when “the rubber is about to hit the road.”

Most business-based coaching concerns one or both of these critical junctures in the life of a manager: decision-making and performance. Yet, there is also a third form of coaching in a business setting that Sue could find quite beneficial. What if she was able to explore even deeper issues with her coach: “Why am I in a setting where I am being forced (or at least expected) to confront a colleague about his performance? What I really want to do is be his comforting friend, who is truly ‘with him’ during these difficult times. Why am I working in a company that places higher value on production and sales than on the quality of its employees’ lives? Why am I setting aside one set of values, regarding life’s highest purposes, in favor of another set of values, regarding loyalty to an organization that pays my salary?”

This third form of coaching seems to lie beneath both the first and second form of coaching. It is a foundation for both decision-making and performance. Perhaps Sue first needs to address these deep, fundamental issues. Then, if she does choose to confront Peter, she can turn to the first form of coaching for assistance in decision-making and strategizing, and, finally, to the second form of coaching for assistance in preparing for the meeting with Peter.

COMING TO TERMS WITH TERMS

We propose that all three forms of coaching might be of great value to not only Sue Gladstone but also many other hard-pressed managers. Given that the first two forms of coaching have been described in many other publications, we will attend in particular to the third form of assistance (which we call *alignment coaching*). We will also propose ways in which it relates to both of the other forms of assistance (which are often identified as *executive coaching* and *performance coaching*). In setting the stage for these analyses, we will first attempt to further differentiate between these three forms of coaching.

Let’s first consider a broader term, *business coaching*. This general category differentiates all three forms of coaching in which Sue Gladstone might engage from personal life and career coaching. While Sue might wish to hire a personal life and career coach if she decides to leave her current job, the issues she is now addressing are all concerned with her values, decisions and performance inside a specific organization. As implied by its name, *personal coaching* concerns issues that fundamentally reside outside the workplace—though they may interact with business-related issues. By contrast, business coaching is an intervention strategy that addresses specific business issues, rather than the personal life of the person being coached—though, as suggested in the case of Sue Gladstone, the issues of business coaching may eventually lead to reflections on fundamental life and career issues.¹

As an organizational leader, Sue Gladstone is charged with declaring the vision and direction of her organization. She is to motivate and inspire others, managing their moods and associated behaviors, thereby setting the tone and climate for how work gets done. When leadership falters or fails, it manifests in sub-optimal

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performance, for the leader, the leadership team, and the enterprise. Trust, enthusiasm and engagement wane without leadership and wisdom.

Why am I setting aside one set of values, regarding life's highest purposes, in favor of another set of values, regarding loyalty to an organization that pays my salary?"

Taking a Human Performance Technology (HPT) approach,² we can look at the business results that aren't being achieved and gather information to determine what root causes are contributing to the poor performance. Certain presenting problems (symptoms) will suggest specific prescriptive interventions. When it comes to leadership and the performance of executives, we can identify accountable results that aren't achieved and the behavioral performances and the decisions that are missing or insufficient. We can select *performance coaching*³ or *executive coaching*⁴ as interventions of choice to alter the direction and velocity (and even mood) of an executive's performance.

Sometimes these interventions will prove ineffective. Closer scrutiny may reveal that additional causative factors are in play: lack of motivation, ambivalent behavior, depression, resignation, resentment, distrust, etc. Another kind of coaching may be required – *alignment coaching*. This gets to where people live and make sense of their lives: their underlying values, beliefs, and attitudes. While this intervention tends not to be in the foreground, it often needs to be interwoven with performance and executive coaching as a way to address the whole person, in context, not simply behaviors and decisions.

Closer scrutiny may reveal that additional causative factors are in play: lack of motivation, ambivalent behavior, depression, resignation, resentment, distrust, etc.

Alignment coaching addresses issues of value and meaning in multiple contexts. It can clarify one's personal values and how those contribute to our perspective on the world. It can help one discern what's important. What should be the focal point? How do we distinguish between true and false riches? Alignment coaching can open the conversation about how one's personal values match or mismatch those of the organization in which we work and the personal and organizational impact of that match or mismatch. It can reveal ways in which we construct our world (known through what and how we use language),⁵ the extent to which we acknowledge our degree of authorship in this construction, and the implications and opportunities for authorship and personal choice.

Alignment coaching can legitimize larger conversations regarding spirit and spirituality in the workplace. How is one's work an expression of a higher calling, on behalf of a greater good? This form of coaching can initiate inquiry into *who we are being* (as distinct from *what we are doing*) at a specific stage in our life and how that fits into some larger plan. From such inquiries and conversations, the executive has the chance to step back, reflect, expand awareness and distinction, make choices, and uncover personal truth about the mysteries each of us are as human beings and the mysteries that are embedded in our purpose for being. From such conversations can come attunement, conviction, direction, velocity and joy.

This essay is meant to sketch the specific area of business coaching called *alignment coaching*, distinct from its performance and executive coaching brethren. In addition to the above definition and statement of intent, we examine four sub-types of alignment coaching; each brings a particular focus, set of distinctions and anticipated outcomes. We offer a case study that illustrates the use of several types of alignment coaching, as well as both executive and performance coaching. We

then relate this case study to an important distinction we wish to draw between three kinds of coaching issues: puzzles, problems and mysteries. Finally, we suggest how alignment coaching contributes to learning, personal wellness and integrity, business performance, job satisfaction, and the joy of living.

FOUR TYPES OF ALIGNMENT COACHING

We propose that alignment coaching has emerged in recent years from several different roots—some of which are spiritual or religious in nature and several of which have a long and venerable history. These multiple roots have, in essence, produced four types of alignment coaching. While they go by many names, we have chosen to label these four types using rather common and straightforward names: (1) *spiritual coaching*, (2) *philosophical coaching*, (3) *ethics coaching* and (4) *life and career coaching*. Following is a brief description of each type.

Alignment coaching can open the conversation about how one's personal values match or mismatch those of the organization in which we work and the personal and organizational impact of that match or mismatch.

Spiritual Coaching

Coming out of a long tradition in many cultures, spiritual coaching primarily concerns the reflective inquiry into and appreciation of the major, transcendent forces that: (1) call on us to improve the quality of our lives, our community and our society, (2) provide meaning and context for our complex and often unfathomable life experiences, and (3) provide an institutional base or set of ceremonial activities that enable us to express our deepest longings and life-joys.

At the heart of spiritual coaching lies the process of *discernment*. Through this process, a coach encourages and enables her coaching colleague to more deeply examine and reflect on the various “voices” that speak to him in his ongoing life. The coaching colleague discerns which messages in one's life are aligned with his best interests and the best interests of his community and society. With the assistance of his coach, the coaching colleague also discerns which messages draw him away from these best interests.⁶

Spiritual coaching is particularly valuable for the so-called “secularist” (or non-believer) who rarely, if ever, thinks in spiritual terms. The process of spiritual coaching for this coaching colleague may involve a process that we call *spiritual assemblage*. The coach helps her colleague to identify moments in his everyday life that in some ways are “transcendent”—special, filled with meaning and purpose, awe-inspiring. The coach then encourages her colleague to assemble these moments—bringing them together so that he might seek out patterns in this assemblage of moments. These patterns constitute the colleague's spiritual life—his area(s) of *ultimate concern* (to borrow a phrase from Paul Tillich)⁷.

At the heart of spiritual coaching lies the process of discernment. Through this process, a coach encourages and enables her coaching colleague to more deeply examine and reflect on the various “voices” that speak to him in his ongoing life.

Philosophical Coaching

This second type of alignment coaching also comes from venerable roots—one might even declare that Socrates was the first philosophical coach! The primary function of the philosophical coach is parallel to that of the spiritual coach, except for the focus of the philosophical coach on the secular, rather than sacred, domain of life. The philosophical coach encourages and assists her coaching colleague to probe deeply into his *underlying assumptions and beliefs*, and to reflect on how these underlying assumptions and beliefs relate to and

impact on his perceptions and actions in all aspects of life.⁸

The role of the ethics coach is to help his colleague identify and clarify her own values and ethical stances

The philosophical coaching session, for instance, might focus on the coaching colleague's assumption about personal freedom—both his own freedom and the freedom of other people. “What will make you feel free? When is freedom an illusion in your life and when is it truly present? Is the choice between two brands of toothpaste really freedom?” Philosophical coaching might also involve probes into the emotional life of the coaching colleagues. However, it is not therapy and the emotional life is addressed in a quite different manner. For instance, while a therapist or counselor might ask a patient why he is anxious and might seek to uncover the roots of this anxiety, the philosophical coach remains in the present and probes her coaching colleague with regard to the meaning of the anxiety in his life: “What does anxiety means to you? How do you know when you are anxious? What does your anxiety tell you?”

Ethics Coaching

Obviously, the issue of ethics is extremely important in the scandal-ridden world of contemporary organizational life. The critical point to be made with regard to ethics coaching is that the coach is not trying to convince or coerce his coaching colleague with regard to a specific set of ethics or life values. Rather, the role of the ethics coach is to help his colleague *identify and clarify her own values and ethical stances*, and identify ways in which she aligns with (and ways in which she betrays) these values and ethics.⁹

The ethics coach also helps his coaching colleague trace out the *implications of her actions* in our complex, unpredictable and turbulent world, and to form new ethical and value-based principles that are responsive to these challenging conditions. Finally, the ethics coach helps his coaching colleague *expand her domain of reflection* regarding values and ethics, seeking alignment between her personal and professional life, between her family and community, and between her personal interests and rights and her collective responsibilities in a changing society.

Life and Career Coaching

This fourth type of alignment coaching overlaps with personal coaching and is probably the most common and diverse of the four. What distinguishes this form of coaching from the other three and from personal coaching? The key factor concerns the breadth of the life review process. Life and career coaching embraces the entire life-experience of the coaching colleague.¹⁰ Broad and enduring life and career patterns are examined by the colleague, with the assistance of his coach.¹¹ Financial issues might interplay with issues concerned with friendships, the use of leisure time, or the identification of alternative career paths.¹²

Life and career coaching also differs from the other three forms in that it often involves inventories, specific sets of interview questions and planning exercises.¹³ A career interest questionnaire might be offered along with a tool that encourages identification of skills that transfer from one career to another. Life career coaching differs from the other three types in yet another way. It tends to be action oriented rather than just reflective. The coach often plays the role of catalyst, cheerleader or even goad, encouraging her colleague to take specific steps that will move him toward specific goals and personal aspirations in his life and career.

How then does the life and career coaching approach to alignment and business coaching differ from personal life and career coaching? The difference between these two coaching strategies is subtle, but important. First, when life and career issues are addressed in an alignment coaching session, the focus is at least initially placed on the work setting. Sue Gladstone moves into alignment coaching because of conflicts associated with her relationship with Peter in the workplace. These conflicts yield important coaching issues that are associated with personal life and career decisions. Conversely, personal coaching that focuses on life and career issues usually takes place outside the work setting and often is engaged by people who are selecting their first job, are between jobs or are contemplating a change in jobs. While alignment coaching is often supported financially by the organization in which the person being coached works, personal life and career coaching is typically financed by the person receiving coaching or by an organization where this person previously worked (as part of a reduction-in-workforce outplacement package).

A CASE STUDY

One of the authors worked for one year with the President (let's call him Tom) of a multi-generational, family-owned business. What brought the coach to the company was a life coaching issue: an acknowledgment by Tom that while business was going pretty well, he didn't have a life outside of work. In fact, his wife had mentioned to him in passing that she felt "like a rose dying on the vine." So the initial step was to distinguish all of Tom's concerns that might become an appropriate focus for coaching. From there, we could articulate a goal state: what would success look like a year hence, both at work and in other domains of life that were important to Tom (such as family, health and well-being, community service, etc.)? Thus, the life coaching approach was a stand to recognize and identify the full range of life domains and their concerns, then ensure work was appreciated within that context, rather than vice versa. Within each identified domain, stated levels of current and desired or projected satisfaction provided the gaps and created a tension and pull where coaching could occur.

Those gaps became the context for a regularized process of life coaching. At the heart was the opportunity to create a "game" or project for each domain. Tom was invited to generate a future or possibility for what would be available in that domain, identify success criteria, establish milestones from the future already realized back to the present, and then create action plans for achieving those milestone outcomes. Executive coaching was then focused on a specific performance aspect: making choices about what actions Tom said he would take to close the gap toward the next milestone. Performance coaching focused on the efficacy and fulfillment of those actions each week.

In the business domain, we identified work projects to create a well-run company that would meet Tom's criteria: allow for 35% less time spent at work, work only in high leverage areas, develop organizational capacities and performance capabilities to perform at same or higher levels, and so forth. Overall, there were more than two dozen projects started, almost twenty completed in the year we collaborated.

Separate from these projects, there were several opportunities for other types of alignment coaching. Throughout the year, we regularly focused on the leverage

Throughout the year, we regularly focused on the leverage points of philosophical coaching: distinguishing Tom's background listening, beliefs, alignment with personal values, overall coherency and consistency.

Puzzles have answers. They are uni-dimensional, in that they can be clearly defined and can readily be quantified or at least measured.

points of philosophical coaching: distinguishing Tom's background listening, beliefs, alignment with personal values, overall coherency and consistency. For example, we distinguished, then talked through Tom's beliefs and values about how best to support his wife, Della, once she had been diagnosed with breast cancer. As a result, Tom was able to talk through critical issues with her as they came up, reducing stress for both of them and assuring wise decisions. Overall, this type of coaching enabled Tom to make important internal shifts. He thus experienced greater freedom, confidence and self-expression, as well as reduced "noise" that would have interfered with doing what he said.

There also were two opportunities for ethics coaching: the reexamination and readjustment of commissions for the sales force and the bankruptcy of one of the subsidiaries of the company. The establishment of equitable sales commissions was one of the first projects chosen, given its assessed consequences for repeat and new sales. A number of coaching conversations allowed for the framing of the values and fairness issues and how to discuss them with the salesmen, ultimately assuring alignment with Tom's personal values. The choices he arrived at, upon reflection, provided a place to stand, a confident and generous context to speak from, and the chance to successfully complete the negotiations. The bankruptcy situation also enabled conversations to clarify values, distinguish ethical dilemmas, and make hard but congruent choices.

At the end of six months, one of us, as the coach, sat down with Tom to assess his progress inside his games. We used both objective and subjective data: number of projects started and completed, timeliness and budgetary parameters on the one hand, level of perceived satisfaction on the other. According to him, we were slightly behind on the number of projects completed, while ahead on number of projects started and projects within budget. But equally import, on the seven life areas he was making an explicit effort to move forward. His level of satisfaction score was the same on two and higher on the other five. And this was at the time of his wife's diagnosis and treatment for breast cancer and the chapter 11 bankruptcy proceedings.

Problems do not have simple solutions. They are multi-dimensional and inter-disciplinary in nature.

At the end of the year's work, one of us, as coach, again sat down with Tom to assess the results we had produced together. Of the thirty projects on the plan (for which executive and performance coaching had been provided), nineteen had been completed, one revoked, six were still in process and on schedule, and four were in process and delayed. Overall, the project work was ahead of budget by about 5%. And in the seven life areas (for which alignment coaching was provided), compared to six months earlier, he had a higher score on three domains and the same score on the other four. Compared to scores at the beginning of the coaching and consulting, Tom had higher levels of satisfaction for all domains on which he had been actively working. And he was spontaneously thinking about and planning how to move his games forward after our collaboration ended. As an aside, his wife successfully came through the cancer treatments and the completion of the bankruptcy proceedings, though painful, freed up time and energy to give to the moneymaking divisions of the business.

PUZZLES, PROBLEMS AND MYSTERIES

We propose that Tom, the President of a family-owned business, is confronted

with three different types of issues that are each amenable to one of the three forms of coaching being considered in this essay.¹⁴

In several cases, Tom is facing issues that we would identify as *puzzles*. These are the everyday issues that anyone working in an organization must face. Puzzles have answers. They are uni-dimensional, in that they can be clearly defined and can readily be quantified or at least measured. Puzzles concern such things as changing a production schedule to accommodate a major new order. Puzzles also concern changes in organizational policies to accommodate new federal laws, or an overall increase in wages to keep hourly workers from leaving the company.

There is a second set of issues that a client faces. We identify these issues as *problems*. When Tom is confronting a problem, there are many more cognitive demands being placed on him, for problems do not have simple solutions. They are multi-dimensional and inter-disciplinary in nature. Problems can be viewed from many different vantage points and it is unclear when they have been successfully resolved. Donald Schon identifies these issues as “messes.”¹⁵ We find a technical solution and realize that the problem has financial implications. We address the financial implications and soon find that there are a whole host of managerial concerns associated with the problem. Problems that exist in contemporary organizations often concern such things as personnel policies (that are not forced by new government regulations), compensation systems (that are not just wage increases), productivity, morale, creativity, risk-taking, flexibility—and trust.

If the problems and mysteries being confronted by Tom were not acknowledged and addressed in the coaching session, then the puzzles on which he chose to focus would have been viewed outside their full context.

Finally, there are issues that Tom must face that defy either clear specification or decisive action. We identify these issues as *mysteries*. This type of issue concerns deeply felt and experienced aspects of life. In some cases, mysteries are associated with loss or misfortune. Why is this person sick or why did she die? Why has this leader or this organization been identified as the cause of the economic downturn in this community? In other cases, mysteries are associated with birth, love or good fortune: the smiling face of a new-born grandchild or the continuing love for a spouse; the opportunity to move into a new international market as a result of a chance encounter with someone at the airport. Mysteries can neither be measured nor confined by a category.

Mysteries seem to take place outside our sphere of control or influence. Psychologists call this an “external locus of control,” and note that some people are inclined to view most issues as outside their control (that is, as mysteries). By contrast, puzzles are usually under our control. Psychologists identify this perspective as an “internal locus of control” and note that some people are likely to view all issues as being under their control (that is, as puzzles). Problems are usually complex mixtures of controllable and uncontrollable elements. To successfully address a problem one typically needs a balanced perspective with regard to internal and external loci of control. [See Table 1, The Business Coaching Taxonomy.¹⁶]

What about Tom? What are his puzzles, problems and mysteries? The initial convening issue for Tom appears to be a mixture of problem and mystery. This is what life coaching is all about—the balancing of life and career, love and work. When the coaching process became more focused, with the client being encouraged to create a “game” or project for each domain, the issue became problem-based. Each game was complex, multi-dimensional and inter-disciplinary. While measurements

Table 1. The Business Coaching Taxonomy

Type of Coaching	Nature of Issue Being Addressed	Examples of Issues Being Addressed	Sub-Varieties of Coaching Strategies
Performance [Behavior]	Puzzle [Uni-dimensional, quantifiable, internal locus of control]	<ul style="list-style-type: none"> • Providing a subordinate with feedback • Building the agenda for a meeting • Preparing a presentation for board meeting 	<ul style="list-style-type: none"> • <i>Engagement</i> (Interpersonal Relationships) • <i>Empowerment</i> (Group Functioning) • <i>Opportunity</i> (Preparation for major event)
Executive [Decision-Making: Cognition/Thought and Affect/Feelings]	Problem [Multi-dimensional, complex (“messy”), mixture of internal and external locus of control]	<ul style="list-style-type: none"> • Determining whether or not to give specific feedback • Identifying primary purpose for specific group’s existence • Understanding the leadership style one prefers in group settings 	<ul style="list-style-type: none"> • <i>Reflective</i> (Deliberating about options, assumptions, beliefs) • <i>Instrumented</i> (Gaining clear sense of personal strengths) • <i>Observational</i> (Gaining greater insight regarding one’s own actions)
Alignment [Fundamental Beliefs, Values, Purposes]	Mystery [Unfathomable, unpredictable, external locus of control]	<ul style="list-style-type: none"> • Determining whether or not to remain employed in an organization that places a low value on human welfare • Identifying the ethical and appropriate action to take in a particular setting • Clarifying one’s own values and perspectives with regard to personal search for both career advancement and personal autonomy 	<ul style="list-style-type: none"> • <i>Spiritual</i> (Discerning one’s spiritual directions) • <i>Philosophical</i> (Critically examining fundamental frames of reference) • <i>Ethics</i> (Identifying and consistently acting upon one’s own values and ethics) • <i>Life and Career</i> (Identifying and acting upon broad life and career preference patterns)

could be taken, no one measurement (nor cluster of measurements) could capture the complexity of the success criteria that he identified in each domain.

There was yet another level of focusing in this coaching process that transformed the issues being addressed by him into specific, manageable puzzles. Specific work projects were identified that had measurable criteria (e.g., 35% less time spent at work). At the end of six months and after a year of coaching, progress in each domain could be assessed and new plans made. This is the great benefit of being able to move in coaching from mysteries and problems toward puzzles: accountability can be established (given that puzzles have internal loci of control and outcomes can be assessed).

This didn’t mean that the rich problem-based and mystery-based components of the coaching process were set aside. They continued to illuminate and undergird Tom’s actions. Furthermore, additional problems and mysteries were identified by Tom throughout the coaching engagement. Together with his coach, Tom addressed the problems associated with equitable commissions and the responsible handling of his subsidiary’s bankruptcy. Tom also had to confront the mystery of his wife’s breast cancer and medical treatment.

This is the strength of recognizing all three types of issues in a coaching engagement. If the problems and mysteries being confronted by Tom were not acknowledged and addressed in the coaching session, then the puzzles on which he chose to

focus would have been viewed outside their full context. His wife's cancer and his ethical struggles regarding compensation and bankruptcy were part-and-parcel of his daily working life. They could not be ignored, nor could the coach have avoided them by referring Tom to a therapist or religious counselor. Business coaching will inevitably move through puzzles, problems and mysteries—given that these three types of issues are inherent and interwoven in all contemporary lives and organizations.

What about the three forms of coaching? How do they relate to these three types of issues? We would suggest that puzzles are often addressed through performance coaching. Tom was receiving performance coaching during the time when he was enacting his projects (“games”). By contrast, executive coaching is usually appropriate when a problem is being identified and analyzed. The client was receiving executive coaching when he first identified the projects and planned for their enactment. Alignment coaching is appropriate when the issue being considered is a mystery or (as is often the case) a blending of mystery and problem. Alignment coaching was being employed when Tom addressed the balance between his life and work, and when he was struggling with the compensation and bankruptcy issues. Alignment coaching was being employed, in particular, when he was attempting to operate as both the owner and leader of a business and the loving husband of a woman who was fighting breast cancer.

Should one person have provided all three types of coaching? We believe that it is very appropriate for a single coach to employ all three types when assisting another person with their complex life issues. When one person is doing the coaching, there is consistency and each issue can be more fully understood within the context of the other issues being addressed in the coaching session. Most issues are nested in other issues. Puzzles are nested in problems that are nested in mysteries.

This doesn't mean that a coach can ignore the important differences between performance, executive and alignment coaching. When there is a shift from puzzle to problem, things get more complex and less clear. The performance coach becomes an executive coach and moves back from execution of a decision to the process of decision-making itself. Success is harder to measure and the coach must be clear with her client that they are no longer in the safe harbor of clearly defined puzzles.

Similarly, when moving from a problem to a mystery, the coach and client must be clear that they are beginning to address issues that may have no solutions and that often lie outside the control of the person being coached.

At this point, the coaching session often moves away from action and towards reflection, away from thoughts and towards feelings, away from a focus on means and towards a focus on endpoints and ultimate purposes. This isn't religious counseling, though aspects of religion and spirituality are often part of the agenda. This is alignment coaching.

Perhaps most importantly, it is important to note that alignment coaching *isn't* psychotherapy, and one must be careful about not moving across this boundary. Alignment coaching, however, is healing and, one might say, “therapeutic” —and the world in which we now live is very much in need of this healing type of dialogue. When addressing problems and mysteries, one will inevitably confront

When moving from a problem to a mystery, the coach and client must be clear that they are beginning to address issues that may have no solutions and that often lie outside the control of the person being coached.

highly emotional issues that tap into long-standing fears and concerns. However, the alignment coach and the person being assisted is to consider these emotions, fears and concerns as *part of the context*, rather than as the *primary focus of the coaching session*.

THE VALUE OF ALIGNMENT COACHING

We have shown and illustrated the settings in which executive and performance coaching can occur and how they contribute to learning, expanded repertoires and perspectives, as well as desired results. Yet the deeper satisfaction and joy of the process and the interim outcomes are often enabled by alignment coaching. It

can expand one's capacity to positively reframe situations to create and declare the benefit or gift that is available. Because alignment coaching specifically attends to one's context and values, and the meaning that stems from those foundations, it connects us with our life journey, our narrative about why (we say) we're on it, and grants opportunities for valuable learning that is essential for traveling well.

The alignment coach and the person being assisted is to consider these emotions, fears and concerns as part of the context, rather than as the primary focus of the coaching session.

Alignment coaching furthers personal integrity, revealing where personal values are aligned and attuned (or not) with one's actions. They can also distinguish the fit between personal values and corporate values. The greater the congruence, the less there is stress due to the inconsistency. Operating consistently with one's values, commitments and higher purpose can be the basis for higher levels of satisfaction and appreciation, greater sustained motivation and discretionary effort, and better business performance. Alignment coaching enables a reflection and perspective that contributes to one's experience of acceptance, wholeness, integrity, connection, gratitude, and purposefulness. These are avenues for living life joyously.

ENDNOTES

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Commentary On Alignment Coaching: The Missing Element of Business Coaching

JOHN LAZAR, M.A., M.C.C. AND WILLIAM BERGQUIST, PH.D.

WHY SELECTED?

John: Our article appeared in the inaugural issue of the *International Journal of Coaching in Organizations* in 2003. A later, more refined version appeared in the *Performance Improvement Journal* the following year. I believe that what was of interest to our readers was a different approach to thinking about coaching in organizations: where to place the boundaries between coaching taxonomy types. Bill had already given this some thought before we collaborated on the article and it provided a vehicle for elaborating and showing the concepts in action.

In addition, the distinctions between puzzles, problems and mysteries added a coaching sensitivity about the nature of issues brought to a coaching intervention and how they would, perhaps even must, be addressed differently. The case study illuminated the complexity of a coaching intervention and illustrated how the three types of business coaching could be implemented and would interact with each other coherently.

Bill: I agree with John. I think the key ingredients were the taxonomy and the distinction between puzzles, problems and mysteries. If the field of organizational coaching (or more generally the field of professional coaching) is to become a discipline—and an enduring human service vehicle—then there is a need for some distinctions to be drawn among different coaching strategies. While no one

taxonomy will ever be adequate, it is important to at least try drawing up a map of the territory so that we can begin to use some of the same terms when referring to different assumptions about and uses of organizational coaching. Taxonomies are also needed if research on coaching is to move past the question of impact (“Does coaching make a difference?”) to the much more difficult challenge of matching coaching strategies with organizational challenges (“Which coaching strategies work best in addressing which organizational problems?”)

If the field of organizational coaching (or more generally the field of professional coaching) is to become a discipline—and an enduring human service vehicle—then there is a need for some distinctions to be drawn among different coaching strategies.

I personally am particularly pleased that the puzzle, problem, mystery distinction has gained some traction. I fear that complex and systemic organizational coaching problems will be readily trivialized into “solvable” coaching puzzles yielding outcomes that are easily observed and measured. While I would like to think that coaching can yield impressive ROI numbers, I also would urge us to think of more subtle evidence of effectiveness. I like the phrase that Jeannine Sandstrom and Lee Smith of CoachWorks use: Return-On-Expectation(s). Expectations seem to be more aligned with the role played by coaches in helping their clients address problems (and even mysteries) rather than just puzzles.

SECOND THOUGHTS

John: Several things occur to me about the article. First, we distinguished a business coaching taxonomy of performance, executive and alignment coaching. The executive coaching distinction (as decision making and related assumptions) seems to be swimming upstream against the more commonly held definition of executive coaching as coaching for people in an executive function. The reader therefore may need to work harder to understand this part of the background.

Second, the four types of alignment coaching, though coherent in concept and underlying discourse, are only one way to parse out this domain. I mention this because I tend to group aspects of philosophical and ethical coaching differently, based on my own comfort level and mental model. Functionally, there probably isn't any difference in the effectiveness of my coaching, because I still am systemic and systematic in my listening, insight and questioning of clients.

I was heartened by how robust the taxonomy seemed to be, for business coaching in general and for alignment coaching and its sub-varieties specifically.

Third, I was disappointed that, because of our lack of expertise with printing technology, our business taxonomy table had to be laid out in a less than visually appealing and clear manner. That has been resolved to my satisfaction, both in the *PIJ* version of this article and the reprint in this issue of *IJCO*.

Organizational Coaching Taxonomy [Revised 2007]

	Performance Coaching	Executive Coaching	Alignment Coaching	Business Coaching
Focus of Coaching	Behavior	Decision-Making: Cognition/Thought and Affect/Feelings	Fundamental Beliefs, Values, Purposes	Overall Business Performance
Nature of Issue Being Addressed	Puzzle: Uni-dimensional, quantifiable, internal locus of control	Problem: Multi-dimensional, complex (“messy”), mixture of internal and external locus of control	Mystery: Unfathomable, unpredictable, external locus of control	Challenge: Specific and focused, yet involving multiple dimensions and multiple stakeholders, internal but broad-based locus of control
Examples of Issues Being Addressed	Providing a subordinate with feedback Building the agenda for a meeting Preparing presentation for board meeting	Determining when to give specific feedback Identifying primary purpose for specific group’s existence Understanding the leadership style one prefers in group settings	Determining whether or not to re-main employed in an organization that places a low value on human welfare Identifying the ethical and appropriate action to take in a particular setting Clarifying values and perspectives with regard to career advancement and personal autonomy	Determining the best procedure for engaging in a strategic planning process Designing a specific job in the organization for high level performance Creating an effective marketing plan to launch a new product
Sub-Varieties of Coaching Strategies	Engagement: Preparing for difficult and important interaction with one other person Empowerment: Preparing for difficult and important work in a group setting Opportunity: Preparing for major event in one’s life	Reflective: Deliberating about options, assumptions, beliefs Instrumented: Gaining clear sense of personal preferences and strengths Observational: Gaining greater insight regarding one’s own actions and the impact of these actions	Spiritual: Discerning spiritual directions Philosophical: Critically examining fundamental frames of reference Ethics: Identifying and consistently acting upon one’s own values and ethics Life and Career: Identifying and acting upon broad life and career preference patterns	Strategic: Creating and executing a strategic planning process Tactical: Implementing various components of a strategic plan Design: Reviewing and modifying job and organizational structures to create high performance Operational: Reviewing and modifying policies and procedures of organization to

Finally, it was fun and instructive to apply the distinctions we were sharing to the case study and see where they fit and how they applied. I was heartened by how robust the taxonomy seemed to be, for business coaching in general and for alignment coaching and its sub-varieties specifically.

Bill: Since John and I wrote this article I have been doing much more with the taxonomy and have used a revised taxonomy in my work around the world—particularly in Asia and in the Canadian Yukon. I find that this new taxonomy makes sense in these highly diverse cultural settings, as well as in my home territory (the United States).

OTHER WORK THAT IS RELEVANT AND OF INTEREST

John: I have found that these distinctions have been useful in several contexts. When contracting for coaching services or a blended, coaching and consulting, intervention, the business coaching distinctions can help me initially slot the hypothesized kinds of coaching to provide. More refinement can come later about the potential types of alignment coaching that might be appropriate.

In addition, I am sensitized to the tendency of an organization’s spokesperson to oversimplify or mischaracterize the issues at hand—in other words, to characterize problems as puzzles and ignore mysteries altogether. Such a listening allows me

to question, push back, and ultimately arrive with the client organization at a common understanding of the nature of the work. This enhances my ability to set and manage expectations, and reduces the likelihood of surprise and upset down the road, especially about performance and intervention duration parameters.

I believe I have a richer set of distinctions to work from when coaching, which can focus inquiry and add value for the person being coached. All coaching sub-varieties have given me a well-articulated map with which to navigate and explore the coachee's world. Questions related to the alignment coaching sub-varieties enable me to distinguish, understand and reveal the coachee's context, the place from which she derives meaning. I have found that working in these areas is essential for creating lasting, sustainable change.

The coachee's narratives and mental models provide orientation towards and reinforcement of old ways of being and acting. Distinguishing them, perhaps even shifting them, is essential for developing new cognitive, affective and behavioral patterns.

People have commented on how 'right on' the tendency is to oversimplify the nature of performance issues in organizations.

Bill: I have nothing further to add to what John has already written. His use of the concepts introduced in our article point to the potential value of any article printed in *IJCO* not only for the reader, but also for the author(s) of the article. When we are asked to clearly articulate our own assumptions and strategies, then, as Donald Schön (1983) would suggest, we become "reflective practitioners" and are better prepared to do effective work with our clients and contribute to our field of professional service.

OTHERS' COMMENTS

John: Without providing specific comments from specific others, the comments I've received tend to fall into two categories: alignment coaching distinctions, including the sub-varieties; and the puzzle/problem/mystery issue. People have positively assessed the usefulness of having these contextual (alignment) distinctions to work with. They seem to have more moves available to them. Similarly, people have commented on how 'right on' the tendency is to oversimplify the nature of performance issues in organizations. They have been bitten by tacitly or explicitly accepting the client's characterization as 'how it is,' then having to work within the assumptive system that is logically energized. By both being aware of this phenomenon and having the insight that emerges from seeing the client's world more clearly, the coach can ask different questions and act more responsibly during the issue identification part of the process.

Bill: Other people who have asked me questions about this article often inquire about the relationship between alignment coaching and personal or life coaching. While John and I have been somewhat at the forefront in terms of distinguishing between personal and organizational coaching (beginning with formulation of the name and initial charter of this journal), I also realize that there is significant overlap between these two coaching clusters and believe that alignment coaching often combines personal and organizational coaching strategies.

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John Lazar has been a performance consultant and coach for over 23 years, including thirteen as executive coach. He has a Master's degree in clinical psychology and has been certified as an ICF Master Coach since 1999. He works with individual leaders and their work teams, altering their perspective, motivation and performance to produce emotionally intelligent leadership, breakthrough results and business success. In addition to business coaching, he consults on issues of leadership, management, communications, executive team alignment, culture-strategy fit, organizational change, performance improvement, and evaluation. With Bill, John is co-founder and co-executive editor of *International Journal of Coaching in Organizations* (IJCO, www.ijco.info). He is a founding member and former Acting Executive Director of the International Consortium for Coaching in Organizations (ICCO, www.coachingconsortium.org).

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Bill Bergquist has offered professional coaching services for more than forty years (though in the early years he considered it to be an element of his consulting practice). As author of more than forty books and fifty articles, Bill continues to be interested in the dynamics of profound individual, group, organizational and societal transformations. He has coached and consulted with corporate, human service, educational, and religious organizations throughout North America, Europe, Africa, and Asia. Having served as President of The Professional School of Psychology (PSP) for the past 21 years, Bill is now concentrating on building a distinctive doctoral tutorial program at PSP that blends intensive in-person and virtual at-a-distance interaction between tutor and mature, accomplished student. With John Lazar, Bill co-founded and serves as co-executive editor of *IJCO* and was also one of the co-founders of ICCO (serving currently as Dean of the ICCO Symposium Series).

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