

# **A case study on the effectiveness of telephone coaching**

**Research**

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**Work Based Research Project  
Module: WBS 4822**

**Project Title**

**A case study on the effectiveness of telephone coaching**

**December 2008**

## Summary

This case study researches the effectiveness of telephone coaching and addresses the following research aims:

- Identify the factors that influence the effectiveness of coaching via the telephone.
- Understand how the coach ensures the effectiveness of telephone coaching.
- Assess how the impact of coaching by phone impacts on the uptake of coaching and how frequently clients are likely to request face to face coaching.

Using interview and questionnaire methods, the research involves a group of three coaches who coach by telephone to different extents, and a group of internal clients from the Royal College of Nursing's (RCN) Management Development Programme.

The research suggests the factors that influence the effectiveness of telephone coaching are:

- Coaches skills in listening
- Coaches use of information other than body language
- Coaches ability to build a relationship on the telephone
- Coaches belief in the value of telephone coaching for clients
- Clients willingness to be coached by phone

The results indicate that coaches ensure that telephone coaching is effective through:

- Listening
- Using silence
- Using an ontological approach
- Paying attention to building relationships with their clients

Telephone coaching can increase the uptake of sessions from 3 sessions on average in the non-telephone group to an average of 5 sessions in those receiving coaching by telephone. The research suggested that 21% of clients would prefer face-to-face coaching.

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## **Chapter 1 Introduction**

### **1.1 Work context**

The RCN has made a substantial investment in the development of internal coaches in order to support managers on the Management Development Programme (MDP). However the take up of the coaching provision by delegates has been variable and this is causing concern to the Organisational Development Department (OD Dept) as the coaching was designed to be an integral component of the programme.

### **1.2 Research themes**

The OD Dept has undertaken some research on the reasons for this (see 2.7) As a result the RCN wants to understand the factors which impact on the effectiveness of coaching via the telephone in preparation for introducing this into the coaching programme.

### **1.3 Appropriateness of the project**

In my role of business development manager I work with internal departments to increase their return on investment, and in this research I will use my business development expertise in addition to my coaching knowledge.

I am also leaving the RCN at the end of November to start my coaching business and I plan to use telephone coaching. I am particularly interested in understanding how the availability of telephone coaching affects the uptake of coaching, as this will help me develop my offer to individual and organisational clients. In addition, I would like to understand how coaches ensure that the telephone sessions are as effective as face-to-face sessions. I plan to incorporate this insight into my coaching practice using Kolb as a practice development model.

## **Chapter 2 Terms of Reference, Research Aims and Literature Review**

### **2.1 Terms of Reference**

The aim of the project is to understand more about the effectiveness of telephone coaching. It will involve a small sample of coaches who use telephone coaching within their coaching practice and a sample of clients who have completed the MDP. The literature search will also include a review of the use of the telephone within coaching and counselling situations. This widening of boundaries is intended to provide richer data on the use of the telephone in helping environments.

### **2.2 Research Aims**

Main research aims are to:

- Identify the factors that influence the effectiveness of coaching via the telephone.
- Understand how the coach ensures the effectiveness of telephone coaching.
- Assess how the impact of coaching by phone impacts on the uptake of coaching and how frequently clients are likely to request face to face coaching.

### **2.3 Research Questions**

The following research questions are designed to meet the research aims:

- What are the factors that influence the effectiveness of telephone coaching?
- How do coaches ensure that telephone coaching is as effective as face-to-face coaching?
- How does the offer of telephone coaching impact on the uptake of sessions within the MDP?
- What proportion of clients is likely to reject telephone coaching and want face-to-face coaching?

## **2.4 My perspective on the research**

Denscombe (cited in Gray 2004) highlights the importance of self in the research, which resonated with my desire to be authentic and open in my values and beliefs and their impact on the research.

The following reflects my position on telephone coaching:

I believe that “coaching via the telephone can be as effective as coaching face to face and can lead to an increased uptake of coaching and reduced costs”.

This reflects my view on coaching:

I believe that “in a coaching relationship the coach provides support to the client; however unlike other helping relationships the coach sees the client as the expert and their role is to be a thinking partner for the client in whatever the client wants to explore”.

## **2.5 Managing conflicts in the data and literature**

I plan to include references which conflict with this position, which include “Many counsellors and psychotherapists still dispute the proposition that genuine therapy can take place over the telephone” (Sanders 1998).

I will include and review any conflicts that arise between the literature and research results “as with the deductive approach, theories are tested through observation, leading either to falsification and discarding of theory, or to the creation of, as yet unfalsified laws” Popper (cited in Gray 2004).

## **2.6 Literature Review**

I used the following sources for my literature review:

- Internet
- Research books
- Coaching journals
- Ashridge database
- British Nursing Index database
- PsycINFO database

A number of themes emerged from the literature; these are listed with the quotes in appendix 1.

The literature review covered contrasting conclusions on the effectiveness of telephone coaching. These included, being more honest due to the distance and finding it easier and cheaper to keep the appointments. In addition, I was surprised to read, “When the telephone is used, counsellors have to adapt their face to face practice and model to the medium of the telephone” (Sanders 1998). This contrasted with my own experience.

## **2.7 Review of previous internal data**

Previous RCN internal research included a question on the reasons why clients did not take up all of their sessions. Reasons given for not taking up the full six sessions ranged from illness to difficulties in logistics due to geographical challenges of the RCN and time issues. No one stated they did not take up the sessions due to lack of interest.

## **2.8 Use of literature and data review to inform research**

This insight contributed to the development of the interview discussion guide and the questionnaire in influencing the questions asked. For example, I asked coaches how they altered their coaching model when moving from face to face to the telephone.

## **Chapter 3 Methodology**

### **3.1 Influences on research methodology choice.**

In deciding which methodology to use, I initially reflected on my own view of how theory should be developed. My previous experience as a science graduate suggested a deductive approach starting with a theoretical model based on previous research. I was also clear that I was seeking to develop theory that could be generalised to a larger population i.e. the whole of the RCNs' MDP and the clients, which I would come into contact with in my new business. See appendix 11 on reflections from learning log.

### **3.2 Research Methodologies explored and rejected**

I initially looked at whether Phenomenology would be a useful research methodology. I decided that it might be suitable to help me understand how coaches ensure that their telephone coaching is effective, as I planned to use a small sample size. However I felt that Phenomenology was a method that did not usually develop theory which could be generalised, also it would not be very effective at addressing the question 'how does telephone coaching impact on the uptake of coaching and what proportion of clients are likely to reject telephone coaching'. I therefore decided to review survey methodology.

I was drawn to analytical surveys due to the deductive approach and suitability to generalize results. However, as I only had a relatively small sample of MDP delegates (29) available to me, I decided that this was too small for generalization using this method. In addition, I felt that a survey approach was not the best approach to answer the question how do coaches ensure that telephone coaching is effective.

### **3.3 Chosen approach –Case study on telephone coaching**

I finally decided that a deductive case study approach “as a key strength of case study method involved using multiple sources and techniques in data gathering” Soy (1997). This approach would enable me to answer all of the research questions using the following data sources:

- Coach perspectives
- Client perspectives
- Literature review

### **3.4 Steps to increase the generalization, validity and reliability of the results**

I was aware that one of the weaknesses of case studies can be generalizability, as commented on by Denscombe cited by Bell (1999) and I planned the following steps to increase generalizability:

- The use of a single embedded case study looking at the different units of analysis shown above, as this will allow data triangulation using three data sources. As I was planning to look at three separate data sources, I considered using a multiple case, holistic approach; however I rejected this as I had defined units of analysis and the single embedded would give more generalizable results.
- The use of Kolb (1993) to help generalize the results by using the theory from the literature review, the research as part of the experimentation and the recommendations as part of the concrete practice.
- The selection of cases that were typical of the population of both coaches and clients generalizability based on advice from Gomm cited in Gray (2004). This included “providing evidence on the ‘fit’ of key characteristics between the sample and the population” and “using a systematic selection of cases for study” and “cases that are typical of the population”.
- The development of a case study protocol as recommended by Yin cited in Gray (2004). See appendix 2
- Looking for conflicting data and use of cross analysis Soy (1997).

### **3.5 Data collection approaches**

#### a) Stage 1

I planned to use a semi structured interview approach (Discussion guide in appendix 3) as it offers the following benefits

- Allows in depth exploration of the coaches view of the phenomenon
- Allows sample to be asked the same questions
- Able to include themes from the literature and data review

#### b) Stage 2

I planned to use a quantitative questionnaire (in appendix 4) to answer the questions around the impact of telephone coaching on the uptake of coaching within the MDP as it offered the following benefits:

- Quick simple questionnaire to complete
- Able to incorporate some of the themes from the coach research into the client research
- Able to quantify results
- Able to incorporate themes from literature and data review

#### c) Piloting of questionnaire and discussion guide

I planned to pilot the questionnaire and discussion guide. The questionnaire was to be piloted with two managers who are on the MDP who are not part of the sample, as they have not completed the programme yet. The discussion guide was to be piloted with a coach suggested by the sponsor.

### **3.6 Sample selection**

I planned to use purposive sampling to choose:

- Coaches who use telephone in varying proportions (exclusively, regularly and occasionally)
- Coaches who are available to take part in the research within a short time frame
- Clients who have completed the MDP

### 3.7 Impact of insider research

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• My role within the organisation which may result in a higher response rate to the client questionnaire and may result in more interest from coaches to take part in research</li><li>• Access to the internal research data</li><li>• Access to a large pool of clients</li></ul>	<ul style="list-style-type: none"><li>• Time constraints due to responsibilities of main role</li><li>• Potential bias as a lone researcher</li></ul>

### 3.8 Ethical considerations

I completed an ethics release form as part of my learning agreement; which was agreed by my project sponsor (appendix 12). I considered the following issues regarding ethics throughout the research; this is adapting the advice in Bell (1999):

- Agreement will be sought from my internal sponsor to the learning agreement
- Participants will have the choice of participating in the research or opting out. This is documented on the initial emails to be sent to the coaches (appendix 5) and also on the email questionnaire sent to internal clients (appendix 6).
- Comments at interview or in the will remain confidential and be non-attributable (appendix 5 & 6)
- Briefing emails will be clear on how the research would be used (appendix 5 & 6)
- Agreement will be sort from the coaches that the notes from the interviews are a true representation of our discussion.

## **Chapter 4 Project Activity**

### **4.1 Finalising research sample - interviews**

I used my coaching network to find a suitable sample. Being clear about who met the criteria (see 3.6) was a useful screening tool.

### **4.2 Stage 1 – In-depth interviews**

#### a) Development of discussion guide

I used the themes from the literature review to drive the design of the discussion guide. I reviewed some previous market research discussion guides following reflection; I added a warm up question and wrap question shown in appendix 3.

#### b) Piloting of interview guide

I used the back up plan from the protocol, as the coach I had intended for the pilot did not get back to me. I piloted the discussion guide with an internal colleague to get feedback on the questions and whether there were obvious questions that I had missed.

#### c) Conducting interviews

I used the discussion guide throughout the interviews and found it very useful as the questions and prompts enabled the coaches to talk more fully. I made notes throughout the sessions and recorded most of the coaches' comments. I checked the accuracy of these notes with the coaches.

### **4.3 Stage 2- Quantitative questionnaire**

#### **a) Developing the questionnaire**

The questionnaire was designed to answer all the research questions except ‘how does the coach ensure effectiveness’. I checked that the format ensured that the questionnaire flowed in a logical order and was applicable to those who had not had telephone coaching in addition to those who had.

#### **b) Piloting the questionnaire**

I piloted the questionnaire as planned and asked for feedback on how long it took to complete the questionnaire, whether the flow was logical and what were the difficulties they found when completing it based on my reading of Bell (1999). See Helped section in appendix 7 and initial and final questionnaire in appendix 4.

#### **c) Engaging delegates**

I sent a personal email to the questionnaire sample (appendix 6), with the intention of increasing the response rate and to preserve individual confidentiality. I gave the delegates two weeks to complete the questionnaire which I felt was sufficient to ensure that clients taking half term as holiday would be able to complete it. I reflected about sending out a reminder email and experienced balancing, between the desire to get as big as response rate as possible and my ethical position that delegates had the right to refuse to take part in the research. I finally decided that I could send a reminder email attached to the original one (appendix 6) giving clients a reminder while also reminding them of their right not to take part.

#### **4.4 Data analysis**

##### **a) In-depth interviews**

After the interview I reviewed my notes and themed them using the themes from the literature review (Appendix 1). Further analysis was carried out using a theoretical proposition (see later in chapter).

##### **b) Questionnaire**

Initially I started to analyse the data quantitatively by developing a simple grid and using a 5 bar approach to scoring. However, I did not find this approach very useful, as it did not allow me to look at the differences in results between those who received or did not receive telephone coaching. As a result, I re-analysed the results initially by splitting the responses into those from clients who had been offered telephone coaching and those who had not. Then I looked at the data to see if I could see any other groupings and I saw that there were as shown in appendix 8.

I also recorded any comments from the clients into each of the groups above. From this initial analysis I carried out further quantitative analysis as shown in appendix 8.

##### **c) Development of a theoretical position**

Initially I used the themes from the literature review to develop the theoretical position. I then developed a table of supporting and contradicting data (appendix 9) and subsequently I revised theoretical position, which I re-analysed the data against (appendix 10). See appendix 7 e) what helped me.

#### **4.5 Reflections on what helped me? (See appendix 7)**

- a) Development of case study protocol
  
- b) Piloting of questionnaire
  
- c) What do I really need to know?
  
- d) Re-analysis of data
  
- e) Development of theoretical proposition

#### **4.6 Reflections on what hindered me? (See appendix 7)**

- a) Recording interviews

## Chapter 5 Project Findings

In order to understand the relative importance of the factors that influence the effectiveness of telephone coaching it is important to understand the relative effectiveness of telephone versus face-to-face coaching.

### 5.1 Can telephone coaching be as effective as face-to-face coaching?

The analysis suggested that telephone coaching could be effective. Previous researches commented that “*participants not only embrace distance treatment as an acceptable access solution but would also select it again over a face-to-face system*” (Lingley-Pottie 2007) and this was supported by comments from one client that “*I had a couple of sessions of telephone coaching as part of my 6 sessions from the MDP. I found them very useful and certainly no less effective than face-to-face coaching*”.

In addition to the evidence on effectiveness, the analysis also suggested that telephone coaching could be more effective than face to face in some situations with a comment from one client “*it allowed me ‘privacy to think’*” This was supported by comments from the literature and from two of the coaches.

Finally, all clients who experienced telephone coaching said that they would recommend it to a colleague. In addition the average number of sessions that took place in the group taking up phone coaching was 5 compared with an average of 3 for the non-telephone group. Both pieces of data strongly suggest that clients found telephone coaching an effective way to receive coaching. However this could be interpreted differently, with the lower take up for face to face suggesting that it was more effective therefore clients needed less sessions. If this interpretation were correct it would contradict the findings above and my assumption that clients would recommend telephone coaching to colleagues because they found it as effective.

## 5.2 What are the factors that influence the effectiveness of telephone coaching?

- a) The coaches ability to listen effectively and demonstrate that they are listening and present for the client

Data from all sources reviewed highlighted the need for effective listening. The questionnaire responses suggested that the important factors for coaches to consider were to show they were listening (66%) and knowing when a client is thinking and when to say something (22%).

- b) The coaches' non reliance on body language.

Both the clients and the literature searches highlighted that being face to face could cause distraction to both the coach and client, with one client writing "*Found telephone coaching better than face to face as I was not distracted by subtle non verbals.*" All coaches suggested that they used other information than body language to connect with their client. More detail is given in 5.4 b).

- c) The coaches ability to build a good relationship with the client over the telephone and responsiveness to the needs of the client to meet face to face

All coaches suggested that they built relationships on the telephone in the same way as face to face. With the literature research suggesting that the level of relationship was as good in face to face as telephone situations. "*High levels of working alliance and problem resolution were found in both face-to-face and distance conditions, providing some support for the effectiveness of distance coaching.*" (Berry 2005)

All the data sources suggested that the coach needs to be responsive to the clients needs for face to face with coaches (3/3) and literature saying "*I recommend at least one personal, initial meeting if possible. But that's not necessary for the coaching relationship to be effective.*" (De Gaetano) With clients saying that at least one or two face-to-face meetings were important with 21% refusing telephone coaching.

### 5.3 Data which conflicts with theoretical proposition

The data from the interviews suggests that the coaches' perception that the client is suitable for telephone coaching is important in their decision to offer coaching by telephone. With one coach saying that they would *“only tend to coach easier clients by phone”* and *“my trickier clients lack interpersonal skills and I feel that my presence is more important with them as feel it is easier to feedback if I experience the whole person.”* This contrast with the view of another of the coaches who said *“if working with a client with low emotional intelligence, I would suspect the feedback would be as difficult on the phone as face to face.”*

This is supported from data in the literature; *“Many counsellors and psychotherapists still dispute the proposition that genuine therapy can take place over the telephone”* (Sanders 1998).

These data suggest that an important factor affecting the effectiveness of telephone coaching is the coaches' belief in its effectiveness. This factor should be added to the theoretical proposition.

### 5.4 How do coaches ensure that telephone-coaching sessions are effective?

#### a) Use active listening

All of the coaches highlighted the importance of listening particularly *“the tone of voice and how the client is phrasing”* *“how they are speaking, their changes of energy, how they say what they say, and their breathing.”*

#### b) Use of silence

The use of pauses and silence came through as key themes from all coaches *“I ask and I don't interrupt pauses, clients have told I that I am good at uncomfortable silences. When the client hits silence this can be good as it can produce something. I may say, “did you notice that pause – what is that telling you?”*

The use of silence was referred to by two of the coaches, *“I use silence rather than body language and it can take a while before the client is easy with silences. I ask the client if they are thinking or stuck e.g. “have you finished your thinking?”*

c) Using body and emotion

Two of the coaches said they “*work from an Ontological perspective with body, emotion and language*” and “*as it is impossible to see the person, I connect through listening to breathing, voices and stories.*”

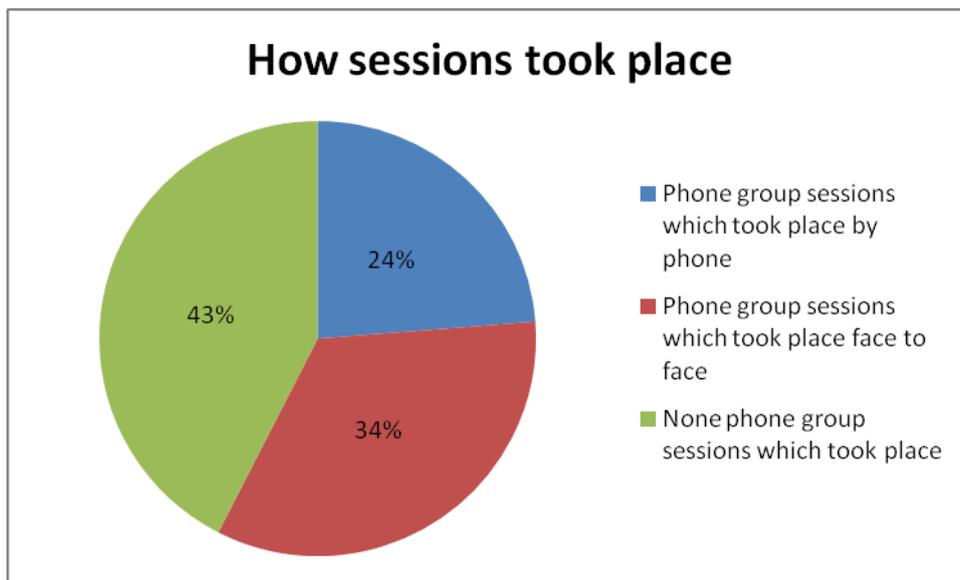
One coach said that they “*listen to their story and get the client to walk around and tell me what they are noticing and what is going on emotionally.*”

Two of the coaches said they ask questions from an ontological perspective for example, “*I ask the client how they are holding themselves and ask them what is going on with their bodies as they speak. I also use my own body experience.*” Also “*if they are talking fast I ask them what is happening in their body “so how about if you sit back?” “I get them to use their body to change their state” and “I also get the client to talk through their shape.*”

c) Build relationships on the phone

All the coaches said they felt that the process of building a relationship was the same on the telephone as when they were face to face “*I use the normal process of building a relationship, checking in and asking what’s important to them now, getting into their space and connecting with their story and being present for them.*”

## 5.5 What is the impact of offering telephone coaching on the uptake of sessions?

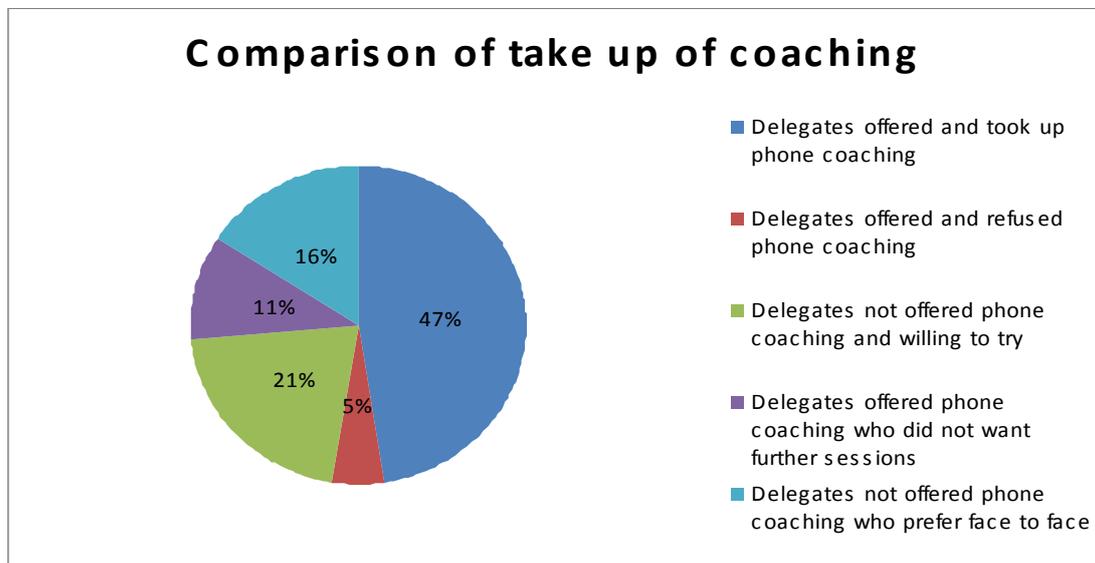


The questionnaire provided useful data on the actual number of sessions; overall 24% of the sessions that took place were by phone. Of the sessions, which took place 58% of them, were in the group that were offered phone coaching compared with 43% in the non-phone group. The average number of sessions that took place in the group taking up phone coaching was 5 compared with an average of 3 for the non-phone group.

Evidence from the questionnaire suggested the benefits of phone coaching to clients were more convenience (66%), less time taken to travel (22%) and less cost as no travel (11%). This was also supported by evidence from the literature review, coach interviews and the previous internal research.

This suggested that telephone coaching had a positive impact on the uptake of coaching with more sessions taking place in the group who received telephone coaching.

## 5.6 What proportion of clients is likely to reject telephone coaching and want face to face?



The data analysis shows that 21% of clients are likely to reject telephone coaching. Actual data given in appendix 8.

This suggests that 79% of clients are likely to accept coaching by phone, which suggests that it will be a useful option for the RCN where clients are based in different locations to coaches.

## Chapter 6 Conclusions and Recommendations

### 6.1 Conclusions.

This research has enabled me to understand more about the effectiveness of telephone coaching. The results suggest that telephone coaching can be at least as effective as face to face coaching. Although the case study used small samples, the fact that purposive sampling was used for the coach sample and the client sample is representative of the clients on the MDP, the results can be generalised for the RCN MDP. In addition, it is likely that the results could be generalised to clients outside the RCN assuming that their profile is similar to the internal clients.

The results suggest that the theoretical proposition needs revising to include the impact of the coaches' belief in telephone coaching. Based on the revised theoretical proposition, the factors that influence the effectiveness of telephone coaching are:

- Coaches skills in listening
- Coaches use of information other than body language
- Coaches ability to build a relationship on the telephone
- Coaches belief in the value of telephone coaching for clients
- Clients willingness to be coached by phone

The results indicate that coaches ensure that telephone coaching is effective through:

- Listening
- Using silence
- Using an ontological approach
- Paying attention to building relationships with their clients

Telephone coaching can increase the uptake of sessions from 3 sessions on average in the non-telephone group to an average of 5 sessions in those receiving coaching by telephone. The research suggested that 21% of clients would prefer face-to-face coaching.

## 6.2 Recommendations

The recommendations for the RCN are:

- To introduce telephone coaching as the main method of coaching with an initial face to face meeting to help build the relationship and review the 360 feedback.
- To hold a telephone coaching development workshop to support its coaches. This will include practice telephone coaching sessions where the coach and client are in separate rooms. This will involve the observer listening into the call, it would be possible to use teleconference facilities to enable them to hear both coach and client.
- To hold an ontological coaching workshop to help internal coaches develop skills that may enable them to be more effective as coaches.
- To hold supervision sessions where coaches can explore their reservations about telephone coaching.
- To track the use of face-to-face vs. telephone coaching against the benchmark that 79% of clients will accept telephone coaching.
- To track the uptake of coaching sessions which should increase from the current average of 4 to 5.

## 6.3 Further research

I would recommend that the questionnaire be repeated once telephone coaching is introduced more extensively to ensure that the results in the small sample are replicated with a bigger sample. In addition, it would be useful to extend the coach research and potentially use a phenomenological approach to develop thick descriptions on how coaches develop their relationships by phone. I would like to develop more research on this area in the future.

In order to validate the theory further, I plan to review the findings with the coaches who took part in the research to ask for their feedback on the research findings, this would increase the validity of the research and reduce the risks associated with insider research.

From a personal perspective, I am intending to read more about ontological coaching, reflect on what I read and what I have heard from the coaches in the research and then experiment with this in developing my future coaching model. I think that this is likely to impact on both my face to face coaching and telephone coaching. This is a good example of how I will continue to apply Kolb's (1993) experiential learning cycle once I have completed the post graduate certificate and will have an ongoing impact as I continue to develop my coaching.

## **6.4 Reflections on learning log**

I have included learning reflections in my helped and hindered section in appendix 7. In addition there are eight main areas of reflection which are referred to in depth in the learning log extracts (appendix 11) these are:

- a) Importance of choice of methodology before methods
- b) Choice of research question
- c) Importance of choice of data analysis
- d) Value of protocol
- e) Reflection on generalisation
- f) The use of the theoretical proposition
- g) Incorporation of learning into my coaching model
- h) Overall learning throughout the programme

Word Count chapters 1-6 4481

Key words: Coaching, telephone, effectiveness

Project Supervisor, Middlesex University: Jean O' Neil

Acknowledgments – thank you to the following people

- Kim Manley (RCN Learning and Development Institute)
- Carolyn Munton (Project Sponsor)
- Geraldine Cunningham (Interview pilot)
- Lynda Isaac (Colleague and questionnaire pilot)
- Nicky Spode (I- coach community)
- Jean O' Neil (Middlesex university)

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