

The Use of Coaching to Obtain Agreement Regarding the Preferred Culture Within An Executive Team

Research

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The Use of Coaching to Obtain Agreement Regarding the Preferred Culture within an Executive Team

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Personal Reflections



Learning Points

Chapter 1

Introduction and Scope of the Research

1.1 Introduction

This chapter summarises my experience of corporate business and its evident need for a more meaningful inclusion of values and culture as the “how we agree to do business” or strategic focus. My passion is for increased performance through alignment in organisational culture and the values which underpin it. That will clarify why I chose this topic for my D.Prof research project. I go on to explain the rationale for the particular company with whom I chose to work.

1.2 A stronger focus on corporate culture and values is called for

My experience as a consultant to corporate business relating to strategy and culture has confirmed my belief that too strong a focus is placed on short-term gains. The goals of maximising profit, and thereby shareholder value, too often appear to disregard long-term consequences. My personal belief is that value creation is about much more than achieving short-term gains. Value creation requires introspection regarding the key values and beliefs of those in leadership positions, and the living of these values in their day-to-day interactions with all stakeholders.

Hopkins *et al.* (2005: 2-3) underscore my personal belief that leaders overlook “corporate culture as a source of competitive advantage for the organisation” and the central role it plays in the organisation’s ability to create and sustain this advantage. Their main reasoning is that corporate culture influences an organisation’s business conduct in the sense that it drives behaviour towards customers, both internally and externally. It is specifically the aspect of customer service delivery, and the effect this has on long-term business relations, which distinguish those companies which achieve short-term success from those which achieve it in the long term. Most corporate strategies deliver results in the short term, but only service-oriented companies build customer relationships for life. Deal and Kennedy’s (1982: 22) research shows that companies gain strength and prosperity when their employees have upheld “shared values”. Values become shared when reinforced, especially by the leader/managers of the organisation.

Shared tactics and buzzwords are some of the factors which Pennington (2006) sees as representative of the organisation’s culture. He makes a compelling case for leaders to choose an organisational culture which engages all stakeholders in the company’s mission.

Pennington suggests that the resulting benefits revolve around effective partnerships and teams, and a focus on what is good and not what comes easy. He relates success stories of companies like Toyota and Nordstrom, where consciously-chosen organisational cultures won the hearts, minds and loyalty of employees and customers.

How is it then that shared organisational values sustain performance and competitiveness? Corporate experience taught me that shared values lead to a preferred way of doing and being which ultimately results in a definite culture (i.e., a collective way of doing and being). A strong culture recognises and reinforces certain behaviours in similar ways to conditioning, i.e. people display behaviours which are rewarded positively, while shying away from those behaviours which result in negative recognition. All individuals need recognition, and when made to feel good about their behaviour they tend to repeat this behaviour, thus reinforcing the resulting culture.

Bellingham (2001: 18) suggests that shared values facilitate a process whereby individuals feel they can contribute to the vision of the organisation. He sees shared values as a helpful benchmark against which corporate decisions can be evaluated. Bellingham also believes that values inform strategy and establish purpose. My corporate experience suggests that the biggest single challenge is the translation of values into behaviour - this will be the key determining factor in making values practical in organisations.

On their webpage, an Irish organisation called XenerGie states its case for alignment of team values in bringing about better dialogue and cooperation. It describes a value as “a code of behaviour, belief, or material element that you intrinsically adopt or hold important”, and suggests that it makes leadership sense to agree a set of behaviours which result in capturing of team energy because of the human tendency to value what people need and believe in (<http://xenergie.com/team-values-at-work.html>).

As most companies are faced with a need to improve competitiveness, as natural consequence is a stronger focus on customer service, linked to incentives aimed at motivating staff towards behaviour which would promote this. My hypothesis is that companies have a better chance of being customer-oriented when led by someone who not only sees economic sense in being customer-focused, but also treats their customers exceptionally. Cultures are maintained through the messages which are sent, often by leaders, as to “what good looks like” – i.e., behaviour which is accepted and expected. Informed decisions need to be taken as to “how we should do things differently so that the customer can be more satisfied”; goals need to be set for the new behaviour, and once it is displayed reward should follow.

Roger Harrison (1995: 200) explains that culture is the key to understanding service: “the service that the organisation offers, both internally and to its customers, is a reflection of that combination of values, preoccupations, social structure, norms and mores which we call organisation culture”. He suggests that ‘walking the talk’ is what matters most: to simply believe that customers need to be seen as kings is not sufficient. In Chapter 4 I relate the four distinct organisational cultures which Harrison identified to their service orientations, which is an integral part of the theoretical underpinning for this research project.

Similarly, Deal and Kennedy (1982: 21) perceive the values of an organisation as the bedrock of its corporate culture, and as such represent “the essence of a company’s philosophy for achieving success, providing a common sense of direction for all employees and guidelines for their day-to-day behaviour”. “Cultural leadership begins when managers search their hearts and souls for the values and beliefs that they are willing to stand behind. The process continues when others begin to accept and share these beliefs and begin to shape their behaviour accordingly” (Deal and Kennedy, 1982: 191).

The value questions which emerge here could render meaningful answers for corporate leaders:

- What values would I be proud to see exercised in my business through my leadership style and how would I achieve that?
- Which values will instil the type of organisational culture that I want in my business?
- What strategy would I use to ensure that people’s beliefs are aligned with the way we should be treat customers, both internally and externally and to ensure that these beliefs are shared?

The key to unlocking changed behaviours and attitudes seems to be a definition by leaders of those values representative of the culture they prefer, followed by quick and decisive action to show they “mean it” (Bellingham, 2001: 111). The experience from this research project is that there has to be agreement by all leaders in the organisation as to the behaviours which would underpin the chosen core values, if they are to be expected to support these openly and willingly.

Culture is created and sustained by human beings – their values, beliefs, needs, expectations, emotional intelligence and especially their behaviours. Tony Manning (2001: 49-50) sees change in behaviour, rather than a change in thinking, as the priority when he suggests that culture is as much a cause as a consequence of behaviour. This is a profound statement, since it moves an individual from victim to master of their own culture. Gallagher (2004: viii) supports this notion when he says that culture is ultimately determined by how we respond to

business decisions, since these are governed by our core values. This is also supported by Bellingham (2001), who suggests that values act as a benchmark or barometer against which to check business decisions.

The challenge for leaders of organisations is to consciously decide what they want their preferred culture to look like, to compare it to their current culture, and then to see how big the gap between the ideal and reality is. They then have to determine which leadership and management practices would best facilitate the mobilisation of the stakeholders in the organisation toward the preferred culture. Haneberg (2005) promotes more intimate relationships between leaders and their employees, to the extent that people know each other at a deeper level. She firmly believes that this would increase the levels of mutual trust and that this would help sustain good performance. The sharing of core beliefs through coaching seems to be a viable strategy through which to achieve this.

The truth about walking the talk, as Carolyn Taylor (2005: xiv) puts it, is that “you can’t fake it!” It’s about who you are, the values that you endorse as a leader, and the embodiment of those values that you pass on to the next level of leaders/managers to ensure alignment in behaviour.

1.3 The importance of cultural alignment

1.3.1 The link between cultural alignment and performance

Leaders with insight into the crucial link between organisational culture and performance understand the need to align all stakeholders in order to create wealth, sustaining the future of the organisation and providing meaning and purpose for all involved. Alignment means that there is synergy among business units or departments with regard to behaviour when it comes to setting goals, managing time, building interpersonal relationships and rewarding performance, since this forms the essence of organisational culture. This starts with the leaders of specific, key business units, and it has to cascade downwards if organisations are to achieve and sustain a competitive advantage in the marketplace.

Kotter and Heskett (cf Rollins and Roberts, 1998: 12) compare the performance of companies with performance-enhancing cultures to that of companies without such cultures and found that the former outperformed the latter by a wide margin in four performance measures: revenue growth, employment growth, stock price growth and net income growth. Measurement allows organisations to compare results for different business units or departments, and also to gain insight into the relationship between work culture and organisational performance. A culture which facilitates future business strategy and sustained financial performance requires

both leaders and managers to raise the bar in terms of performance standards (Deal and Kennedy, 1999: 251). In contrast, one of the most frequent causes of failed organisational interventions is neglect of the vital role that a distinctive organisational culture can play in the achievement of strategic objectives (Cameron and Quinn, 1999).

1.3.2 Aligning sub-cultures and their values

In a study related to this topic, Hopkins *et al.* (2005) have found that the more employees are committed to key organisational values, the stronger is the organisation's corporate culture. Their results show that employees in organisations with strong corporate cultures are more committed to their organisation's values than employees in organisations with a weak corporate culture. Both strong and weak organisational cultures have sub-cultures; however, a key difference is that when corporate culture is strong, sub-cultures are aligned, whereas when corporate culture is weak, sub-cultures tend to be misaligned.

From their investigative approach, Deal and Kennedy (1982: 135, 136) found the phenomenon they call inconsistency or fragmentation to be a cause of cultural division within organisations. Deal and Kennedy warn against allowing for different rules to be applicable within different parts of the organisation, and warn their readers about the development of sub-cultures, since this seems to weaken the main culture.

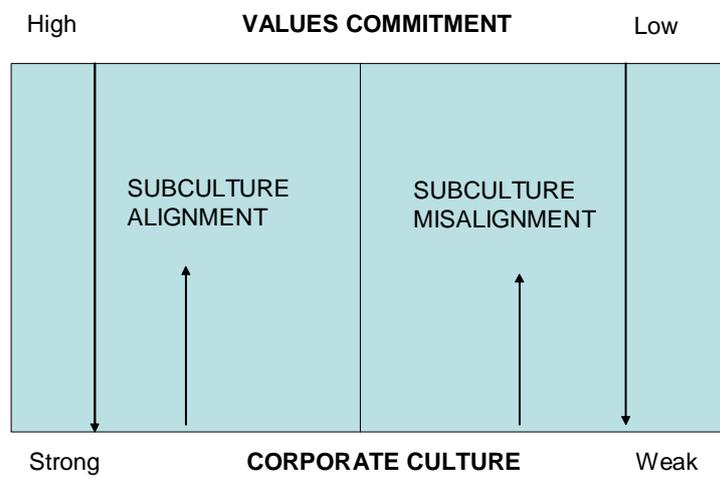
Sub-cultures are a reality in all organisations; they may be based on membership of various groups such as departments, work groups and teams, geographical areas, etc. Differences in work orientation, with respect to targets, client groups, inter-relations, hierarchy and work methods, promote the forming of distinct values within these sub-cultures. The more distinctive the value system, the stronger the potential for misalignment seem to be. This strengthens my belief that sub-cultures must be aligned if organisations are to achieve and sustain a competitive advantage in the marketplace, maintain their customer base, and hence require less sales and marketing activity and expenditure.

According to Spike (<http://www.nrharural.org/conferences/pdf/07QCHandouts/Spike.pdf>), sub-culture alignment to the organisation's mission and values significantly influence results, since the people working in companies with strong cultures feel a sense of control in choosing to do what they believe is right.

The model by Hopkins *et al.* (2005: 5) in Figure 1 indicates that in subgroups either align or misalign with organisational values. The corporate culture can fragment to different degrees when subgroups exist and only a few values are shared by these subgroups. This is what Hopkins *et al.* (2005: 4-7) mean by "sub-cultures".

This model was very useful while I was managing an EU project in Sweden. My role was to facilitate cooperation among a group of independent Swedish organisations, with the purpose of preparing them for participation in the international business arena. During the initial phases of this project, intended to establish a working agreement among six companies, I learned that an intense process of combined group and individual coaching was the only way to achieve congruency at work. Once this congruency was achieved, my focus shifted to training and coaching selected, key individuals and small teams in the processes of forming new international partnerships. Among other things, this involved appreciating cultural differences and overcoming language barriers (I conducted all communication with my clients in English). I used coaching, complemented by specific training, to achieve learning transfer. This learning curve prepared me for the challenge which lay ahead – doing my research on the alignment of a team with regard to their preferred culture within their organisation – also within the Swedish business environment.

Figure 1 Commitment, culture, performance, relationship



Source: Hopkins *et al.* (2005: 5)

1.4 Building a relationship of trust with the prospective client organisation

At the conclusion of the project mentioned in Section 1.3.2 above, which I co-managed on behalf of the European Union and the Swedish Government, I approached one of the independent Swedish companies who was a key stakeholder in the project. This was with a view to partnering with the organisation to complete my research project. The company was Epsilon Industrikonstruktioner AB (hereafter called Epsilon).

This engineering company, which focuses on design for the automotive industry, was of particular interest to me since it wanted to integrate the cultures of six different business units to achieve alignment. The MD of Epsilon was excited by the idea that “values” are the essence of corporate identity and culture. His belief was that “values” underpin culture, and that what a company does (i.e. its business focus) is as critical as the way in which it is done (i.e. its values and cultural focus). This influenced the forming of my research question. Another contributing factor was that their business philosophy and goals already reflected both strong support for key values and support for the individual growth and empowerment of each employee.

Another factor which significantly facilitated my working relationship with the prospective client organisation was that we had been working together for three years, and had established a solid working relationship based on trust, respect and appreciation for common business goals.

The first step decided upon by the MD of Epsilon and I was a two-day workshop for all the executives reporting to him. The primary focus of this workshop was the importance of alignment of all stakeholders to the strategy and culture of the organisation. Its secondary focus was the instrumental role that coaching could play in achieving cultural and value alignment in the organisation, provided the executive team could: first, agree on what the current culture was and what the preferred culture should be, and second, identify the behavioural indicators that would strengthen and mobilise the organisation towards their preferred way of doing business.

My key message during this workshop was that *strategy* is “what we do in the organisation”, while *culture* is the “how we do business”. These two need to be in alignment if the organisation is to develop a standard way of doing business, especially with regard to the level of service rendered by the various business units, which would give the customer confidence in the organisation’s ability to serve his needs. Since Epsilon had no formal strategy in place at the time, this had to be our starting point. Effectively this meant that I had to postpone the coaching part of my research until Epsilon had decided on a strategy for their organisation.

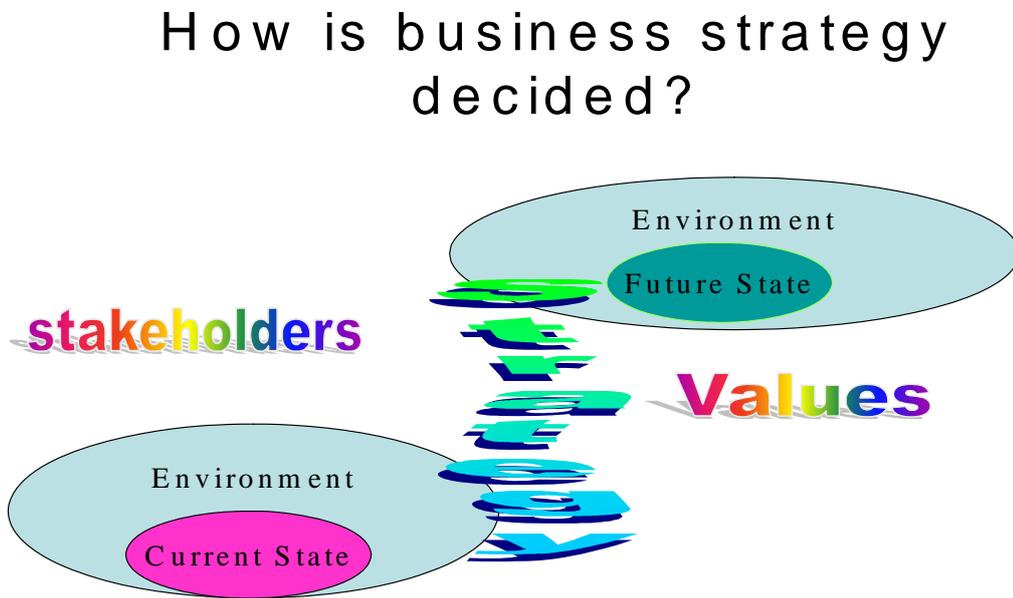
This was based on the hypothesis that any decision about the preferred organisational culture has to follow the decision about what strategy to follow, since culture facilitates strategy, and not the reverse.

Outcomes expected from this two-day event were: to develop a common way of thinking about the future strategy of the organisation; to develop a strategy based on market intelligence; and to ensure alignment on the commonly agreed future of the organisation. This was achieved by assessing their current strategy against the principles and practices of successful organisations worldwide with the help of some practical tools for the planning, implementation and monitoring of the agreed strategy. On a personal level, the members of this executive team wanted to understand each other's business better in order to facilitate closer cooperation and the use of each others' strengths. This, they believed, would help them to build bridges among the various business units, which operated in different geographical areas.

Figure 2 was used to describe the elements and the process involved in deciding upon a new business strategy. First, the future state of the organisation within a given time period is determined, after which the environment of the envisioned future state is described. The same is done with the current state of affairs in order to determine the gap between targeted business results or outcomes and those currently being achieved. In so doing, the expectations of all relevant stakeholders such as customers, shareholders, suppliers, staff and others were taken into account, as well as the key values which underpinned the organisation going forward. This culminated in a statement of intent or strategic purpose/direction for Epsilon.

The next step was for Epsilon to analyse the wider business environment to identify business opportunities and organisational threats. Figure 3 hosts a total of three analytical tools used to determining Epsilon's strategy. The outer ring represents the Pestle analysis technique used to scan the global business environment in terms of the opportunities and threats it represents in the political, economical, social, technological, environmental and legal arenas (Havengal and Edmonstone: 1999). The inner circle represents a market analysis tool borrowed from Porter (1985), and the middle block hosts the 7S theory used to assess the organisation's internal readiness to implement a newly decided strategy in terms of management style, strategy, structure, systems, staff, skills and shared values (Rasiel and Friga: 2001).

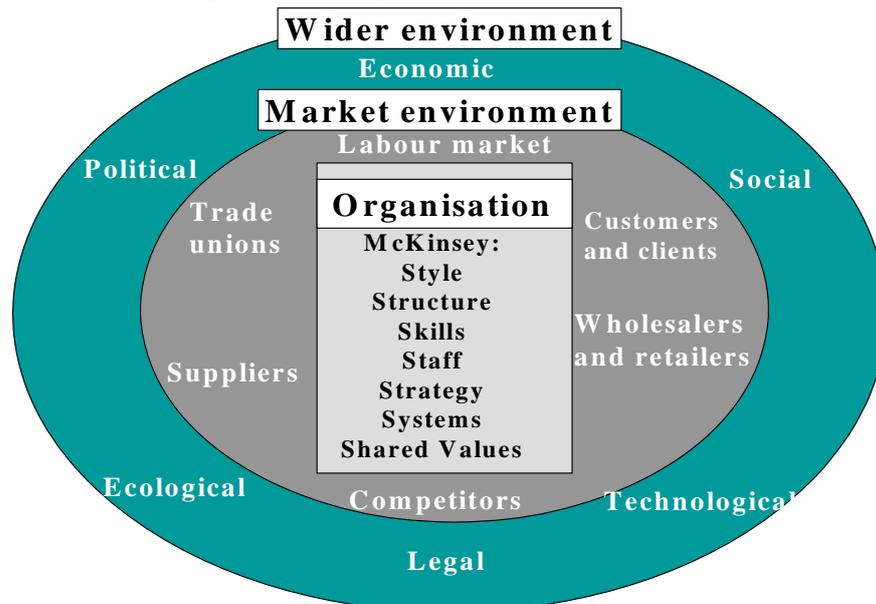
Figure 2 How a business strategy is decided



Source: van Coller (2007)

Figure 3 Mapping out the environment

Mapping out your environment



Source: Adapted from Havengal and Edmonstone (1999) and Rasiel and Friga (2001)

The resulting analysis completed during a workshop was used to determine a new organisational vision statement. This new vision statement was designed using the key ingredients of a good value statement, namely:

- What the company does.
- The markets they are in and aim to be in.
- What their competitive advantage is.
- How well they were doing in the market.
- How well they apply all of their resources.
- How they are doing business.
- What the economic viability of their business is.

The newly agreed Epsilon vision statement read as follows:

Vision statement:

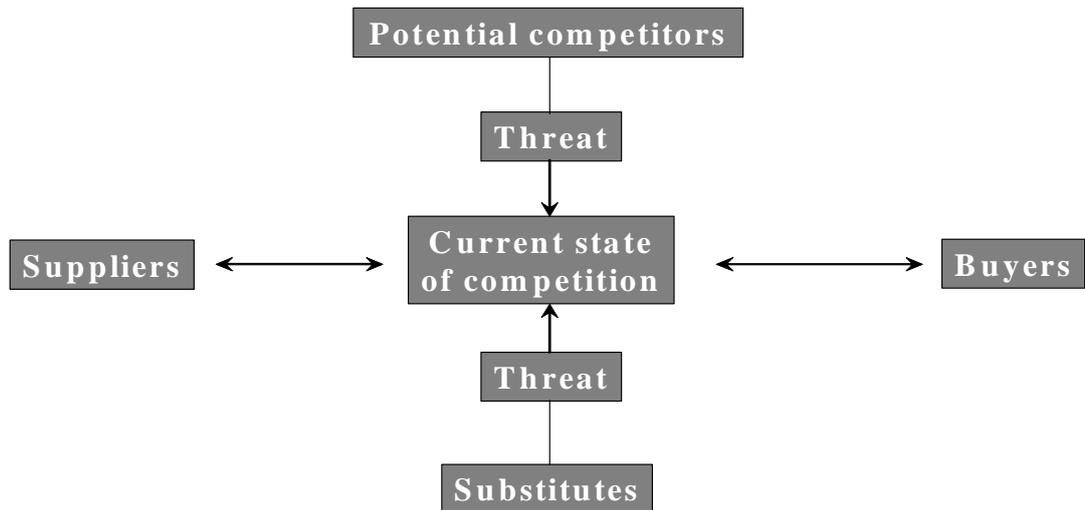
- Epsilon Industriktioner AB, based in Europe
- Offers technical services/total engineering solutions to manufacturing industries, in the form of:
 - projects of all sizes (including turnkey);
 - engineering services;
 - in close proximity to our customers
- To all markets where we can use and continually develop our existing exceptional competence in both engineering and project delivery.
- We are open to networking and partnering with our international counterparts, with a view to strengthen and develop long-term, viable, customer relationships.
- We ensure an uncomplicated business experience with the aim to provide a mutually beneficial business result/outcome for all involved.

Of particular interest to the team were some of Epsilon's strengths and weaknesses pertaining to the market in which it was operating. Five key factors were scrutinised (see Figure 4):

- The risk of new entry by potential competitors.
- The degree of rivalry among established companies.
- The bargaining power of buyers.
- The bargaining power of suppliers.
- The threat of substitute products.

Figure 4 The market environment

The market environment



Source: Adapted from Porter (1985)

The application of the tool in Figure 4 led to an identification of strengths, weaknesses, opportunities and threats pertaining to the organisation at the time, and is worth mentioning as these played a key role in the preferred culture they executive team agreed to.

Strengths

- A strong customer base.

Weaknesses

- Weak brand name.
- Lack of marketing resources.
- Geographically spread out business units.

Opportunities

- Possible partnership in-house: between various business units.
- Better organisation: To use existing competence and resources from known markets to capture new markets.

Threats

- Customers/companies leaving Sweden.
- Customer base shrinking.

The closing conversation at this two-day programme centred around the need for a consistent culture which would ensure that wherever the Epsilon customer does business (referring to the six different business units, each situated in a different geographical area), he/she would receive a consistently high standard of service.

The result of this workshop was a request for a proposal from my prospective client (the executive team of Epsilon) in terms of which I would help them align their strategy and culture – work for which I would be paid market-related fees. It was also agreed that I could use this opportunity to do the necessary research for my doctorate degree in professional studies.

My next challenge was to formulate a research topic which would make academic and practical sense and which would result in a satisfied client as well as a credible, feasible and work-based research topic. A proposal was delivered to the core executive members with the following two foci:

1. Identification of the steps in a coaching process, aimed at facilitating agreement among all members of the executive team regarding the culture, or combination of cultures, that they prefer to have in the organisation.

2. Investigation, through coaching, regarding those indicators which reflect the existing and preferred cultures of the organisation

As a sign of my client's commitment to finding out what their organisational culture should be and their newfound interest in coaching as a tool to do so, the MD of the client organisation signed an agreement for the implementation of this research proposal with me on 8 October 2004.

The agreement specified the title, aims, outcomes, scope, feasibility and impact of the proposed research, all of which is covered in Chapter 3 of this document.

1.5 How the research topic came into being

The discovery of a suitable research topic was influenced significantly by the available literature in Sweden at the time, since this was the country where Epsilon Industriktioner AB (Epsilon), my client organisation, was based. Some of the more significant readings are highlighted in Chapter 2 under Section 2.5.1 because of their significance in the development of the research topic I finally chose.

In essence, what most authors on the subject of organisational culture in Scandinavia seemed to have in common was a perception that company culture is a deciding factor in business success, in that it supports business goals in a way which ensures alignment with behaviour. This alignment of goals with behaviour among key stakeholders in turn facilitates better customer service borne out of a keen want to serve and satisfy the expectations of both internal and external customers.

Epsilon's own website reflects their perception of organisational culture as key to generating a dynamic work environment. In fact, their signing of the coaching agreement for the implementation of this research project signified their commitment to finding out what their preferred culture should be.

Through ample reflection and discussion, my research topic was established as "The use of coaching to obtain agreement regarding the preferred culture within an executive team". Timing was excellent seeing that the client organisation had recently gone through major changes and was still in a state of transformation.

My understanding of transformation is that personal transformation intricately connects to organisational transformation, because people are best able to change when they receive positive reinforcement from the primary institutions in their lives: their families, schools and

work environments. Hence the process of obtaining agreement regarding the preferred culture within the executive team of my client organisation was a personal challenge, which I hoped would facilitate intellectual and spiritual growth for all involved.

As human beings we have the capacity to create abstract concepts to explain reality and to imagine a future reality which is different from the current one. We can also use these concepts to guide our own behaviour towards the wanted future reality (Zwell, 2000: 144). In this context, the values of a group of people play a key role in creating a culture within that group which provides the framework within which to make decisions and take actions. Similarly, organisations can make choices about the culture and values which would be instrumental in bringing about organisational renewal.

At this point it may be useful to define the term “values”. For Pavlina (2007: 1), values are priorities that tell you how to spend your time, right here, right now: “the main benefit of knowing your values is that you gain tremendous clarity and focus”, and this facilitates consistency in decision making and commitment to action. With regard to the living of personal values, Hoffman (2006: 1) suggests that “leaders must wear them openly, constantly encouraging, mentoring and coaching others to operate within the values-based and ethical standards the leader expresses”.

Personal values can be chosen consciously, thereby becoming tools which allow choice of new behaviours which can then be instrumental in bringing about meaning and value in individual lives.

The saying “what gets measured, gets managed” has particular relevance when comparing current with preferred cultures within organisations. Rollins and Roberts (1998: 12) strongly advise us to compare the values and behaviours which employees experience every day with the culture to which the organisation aspires, in order to effectively understand how to improve work culture.

Personal experience has taught me that a process of “discovery and reflection upon personal values” is best achieved through a trusting one-on-one relationship, since values represent a person’s innermost being, forming the basis of all beliefs and directing the individual’s behaviour. As coaches we need to provide a space within which our clients can reflect upon their values, beliefs, and resulting behaviours. Nancy Kline’s (1999: 19) description of the Thinking Environment as “a way life and work and love and everything human was meant to me”, and her description of this space as stimulating, kind, alive and authentic, confirmed that the coaching approach I planned to use for the collection of relevant and meaningful data (as discussed in more detail in Chapter 3) was indeed the most appropriate approach.

Having confirmed that the research topic was meaningful to both my client and I, we entered into an agreement regarding the process of research to which both parties were clearly ready to commit.

1.6 Establishing a working agreement with the client

The Managing Director (MD) of the client organisation, and the sponsor of this project, wished to determine what type of culture and values would facilitate better integration of the six independent business units which formed a major part of his company. He was keen to know which management practices would need to be put in place to ensure that service delivery is standardised across all business units – as a way of ensuring repeat business. He expected the outcome to be a strengthening of the internal Epsilon brand across all business units.

In terms of our agreement, I was at liberty to: administer a cultural survey on all members of the executive team of Epsilon; facilitate sessions with the executive team to determine the preferred culture, values and behaviours; and to conduct the necessary group and individual coaching sessions in order to establish the difference between their own perceptions about existing and preferred cultures in the organisation and those of other team members. I would have access to key resources (people and information) and could communicate openly about the project, its intentions, progress and findings.

Stakeholders of this research project would be as follows:

- My clients were the MD of the client organisation and the eight members of his executive team. Six of the members were heads of geographical business units, each with their own business goals, clients, leadership styles and cultures, while the other two members managed support functions.
- Leader groups around the world who struggle with the issues of alignment (especially with regard to the values and culture of their organisations), and of knowing what constitutes a certain culture and how to live it!
- Coaches and prospective coaches who have to work within the boundaries of company systems, complicated by cultural diversity. Making practical the management and leadership behaviours which display/reflect a given culture could be a possible result to be used by them.
- The coaching community at large, who could benefit from a successfully completed research project focusing on a group and individual coaching approach to the question of alignment of cultural perceptions.

- My home country, South Africa, which presents any coach with profound challenges when it comes to agreeing on values and culture, seeing that every one of the 11 official cultures/language groups is striving for acceptance and credibility.
- My family and myself, for whom a successfully completed research project would mean a step closer to the fulfilment of a dream of becoming a professional coach, and in doing so provide that little more for my family in order to reach our long-term goals.

At the stage of reaching agreement with my sponsors on the expected project outcomes, I felt confident of my personal knowledge and skill levels necessary for the successful completion of the chosen project.

1.7 Conclusion

Having identified a need for a stronger focus on customer service, the members of the executive team of Epsilon were eager to embark upon a journey of discovery, not only of the company's but also their team members' strengths and needs for alignment. Together they would identify the current and preferred cultures for their organisation and realise that, although very different in their leadership styles, to all intents and purposes they all had the need to leave behind the control-oriented organisational culture for a more diverse combination of cultures. Their aim was to stimulate a need towards higher achievement, supported by a leadership corps who themselves were craving more support from peers while striving for an ever-increasing demand for service leadership from both their internal and external customers.

As a team they would venture into team coaching, something which would not fit the approach of the control-oriented culture they wanted to shed, and discover that together they could foster an environment within which their internal customers would feel eager and enthused to perform to higher levels and offer support to others striving for the same goals. Individually they would risk sharing their innermost thoughts with a personal coach, in order to hone their leadership behaviours towards the norm agreed by their individual teams. They were assured that their team members were also willing to trade their comfort zones for uncharted territory, i.e., the space offered by a coach within which they could safely explore new ways of thinking and behaving. The new thoughts and behaviour would lift them to greater heights individually and also as a team, mobilising them towards an organisational culture which could potentially bring them all greater success.

In Chapter 2, the purpose, aims and objectives of this study will be discussed. A short but relevant literature review would be provided which presents authoritative scholarship on the

research problem in Scandinavia. It also explains what informs my research with regard to my coaching framework, and summarises those forces and influences which facilitated my understanding of the research topic, my development towards this area of research and the personal meaning I derived from it thus providing the impetus towards the research and results.

It should be noted that an in-depth literature review regarding the topic of the research is divided between the first two chapters due to the innovative nature of applying *coaching* regarding *values* in order to establish a *preferred culture*. While this research could be groundbreaking, a practical implication for this research report is that a collective case for the topic could not be given within a single chapter. Accordingly, Chapter 1 highlights the relevance of leadership making an informed choice regarding the organisation's preferred culture, underpinned by their personal and collective values. Chapter 2 informs the reader regarding the appropriateness of coaching as a vehicle to achieve alignment in the behaviours which reflect the collective values which underpin the preferred culture of an organisation. The author's views are strengthened by what was available and relevant in the literature; although this was very limited, any relevant publications in Scandinavia (particularly Sweden) were thought to be especially worthwhile for purposes of this study (see Section 2.5.1 for more detail).

Chapter 2

Relevance and Significance of the research

2.1 Introduction

This chapter is dedicated to the forces and influences which facilitated my understanding of and leaning towards the topic ultimately chosen for my D.Prof research. It provides the reader with insight into the culmination of my many and varied development paths into a personally worthwhile and significant topic, context and timeline. I share the values which inform me as a coach, and reflections on how my work experience facilitated my growth and honed my interests towards developing a dual coaching-consulting approach to organisational interventions. My ever-evolving coaching approach is put under the spotlight, with specific reference to my experimentation with coaching, theoretical influences on my choice to become a professional coach, and the learning journey which brought me to a choice regarding a meaningful and relevant research topic for purposes of completing my D.Prof at Middlesex University. The reader should have a better understanding of my passion for the consideration of shared values among those forming leadership teams for the main purpose of aligning thoughts and behaviours towards common goals.

2.2 Personal value base influencing the coaching approach

First, I believe that I should always leave someone in a better place than the one I found them in. I do accept and respect people of cultures, societies and religions other than my own, and will engage into a coaching relationship with them as long as they accept and respect where I come from. Second, values are at the centre of my personal belief system. My core beliefs are respect, fairness and honesty. These values drive my thoughts and my behaviour and are a very important part of my coaching style. Third, contracting (formal or informal) in writing is imperative, because parties feel more comfortable when commitments are on paper: the goals, timelines and measurable outcomes are defined, which leaves little to chance and ensures objective evaluations of results; and handover and disengagement need to be defined because human nature finds a constructive coaching relationship hard to terminate.

Fourth, I believe that my approach is to “first seek to understand others and then to be understood”. Part of the coaching process is to begin to understand the client’s values, beliefs, feelings, and the systems in which the client operates. This is the only way to discover what your client’s constructs and views are. It implies thorough, open-ended questioning, and a

keen focus on body language for other valuable clues as to the meaning of the client's verbal message.

In coaching, both big and small improvements are important. People are complex, and with some big strides are possible, while with others the coach needs to find satisfaction in facilitating small learning. I have come to appreciate that incremental changes are often longer lasting than big and bold changes, and I have come to appreciate both. A keen awareness of my own strengths and development needs facilitates a trusting relationship, because I coach only in the areas in which I know I have the necessary knowledge, skill and experience. My clients appreciate my honesty, and are more likely to involve me in their business and to enter into meaningful conversations with me because of this.

I have a keen sense of balancing the messages coming from both the conscious and the sub-conscious mind (both objective and subjective), before judging/deciding. This is a personal practice, which I often use when coaching others, especially during critical times of decision-making. It is a skill that I try to impart to those interested in continuous personal growth. When becoming aware of a preconceived idea (most often a message from the sub-conscious mind), I use cognitive behaviour self-coaching to identify the activator to the negative thought and replace it with a more constructive thought, in an attempt to facilitate a more constructive consequence.

It is my aim to increase the client's circle of control and decrease their circle of concern, through increasing awareness of their own feelings, thoughts and intentions as well as those of others. The client could be extremely resourceful in exploring their own situation and creating alternative options of dealing with it. Often they just need a gentle push or pull in the right direction.

I do not trade my coaching for my client's responsibility. The client needs to take responsibility for their own thoughts and actions, so as to be truly committed to either reinforcing them or changing them. Unsolicited advice has repercussions later.

My client's perceptions are the only reality I work with. Success, satisfaction and happiness are so abstract the only measure of client satisfaction is as per his perception. Any phenomenon represents a suitable starting point for an investigation. Perceptions therefore serve as the essential beginning of meaningful conversations.

My experience is that a positive self-perception/self-esteem can build and a negative self-esteem has the capacity to destroy most learning efforts. My professional experience has

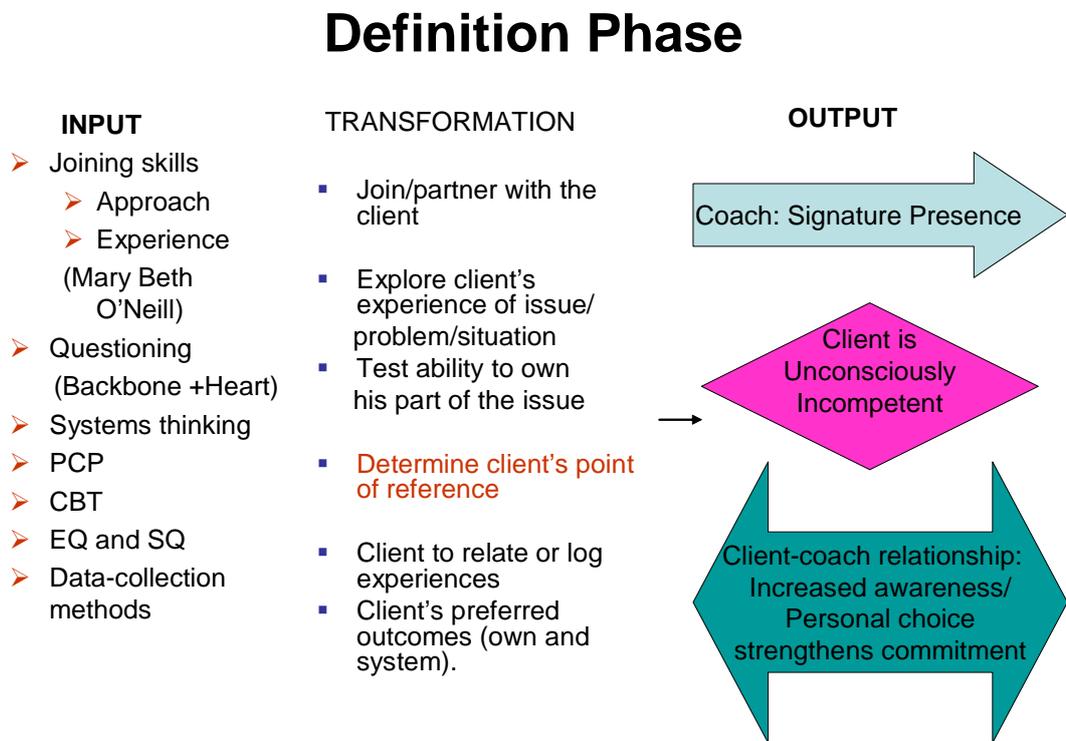
shown me that building someone's self-esteem is the greatest contribution I can possibly make as a coach to my client's "success".

Most needed change has the potential of becoming a positive, enjoyable experience for all parties involved, and therefore the choosing of a creative name for the change is useful. In this sense visualising the end result is crucial, prior to looking into the current *status quo*. The intervention constitutes the plan of getting from the "now" to the "future" or vision. The reality is that some things need changing, which most people see as a loss state, a taking away from me-action. My approach is to treat change as a creative, fun and worthwhile journey, and therefore I call it "renewal".

At the outset of this research project I was keenly aware that some of my personal values would foster the building of constructive coaching relationships with my clients, while some could pose difficulties. For instance, my need to formalise the contracting part of the coaching relationship may prompt questions in the mind of my Swedish clients, since one of their basic values is that "a handshake is good enough". Further, my value relating to "not taking the client's responsibilities upon my shoulders" may be challenged, since the role I used to play in the client organisation prior to this research project was that of consultant. In a consultative role it is ethically acceptable to provide advice and direction, whereas in a coaching relationship one facilitates a process whereby the client finds their own direction and generates their own options/solutions. I made both mental and pencilled notes with regard to ensuring that I clarify my role in every session (for my own sake as well as that of the client).

As the very foundation of me stands my own beliefs, values, perceptions, etc. which form my philosophy about life and the people in it, the way I approach situations and what I hope to achieve by doing so. During this particular part of my learning journey to becoming a professional coach, my own coaching framework was becoming explicit, and it was appropriate to test how its application could render outcomes which were relevant to the customer and also personally meaningful. Figure 5 outlines my entire coaching framework, which is detailed enough not to warrant much explanation, complete with inputs, transformation and outputs. The basic framework of David Lane (1990: 120) has been adopted for this purpose. The "input-transformation-output" structure I used is the i-coach academy's preferred way of presenting coaching models.

Figure 5 Personal coaching framework



Exploration Phase - General

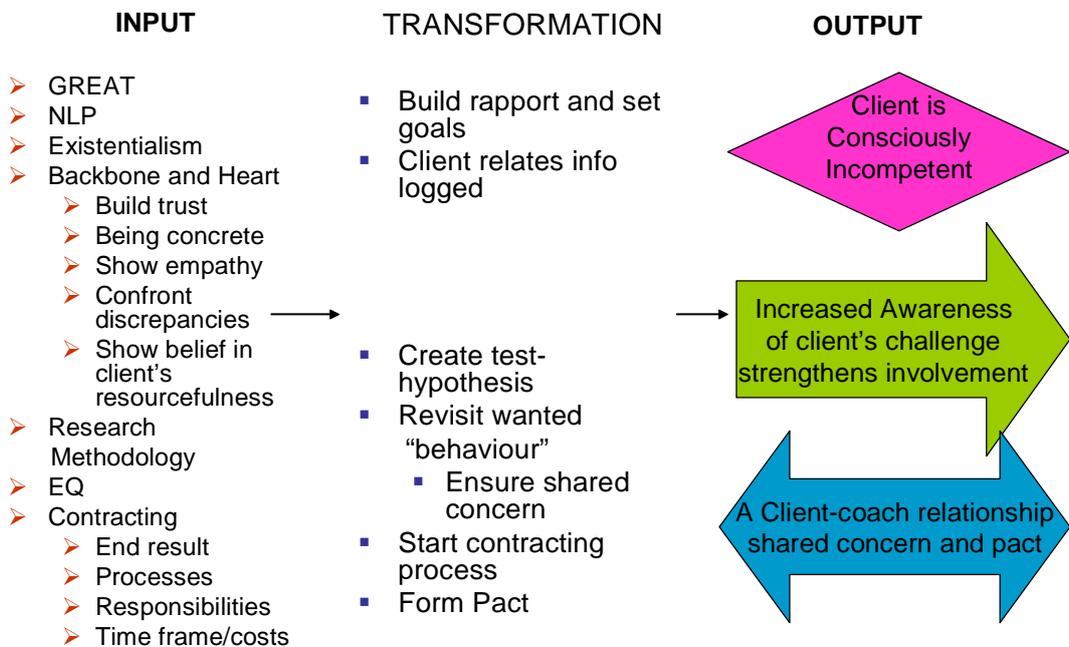
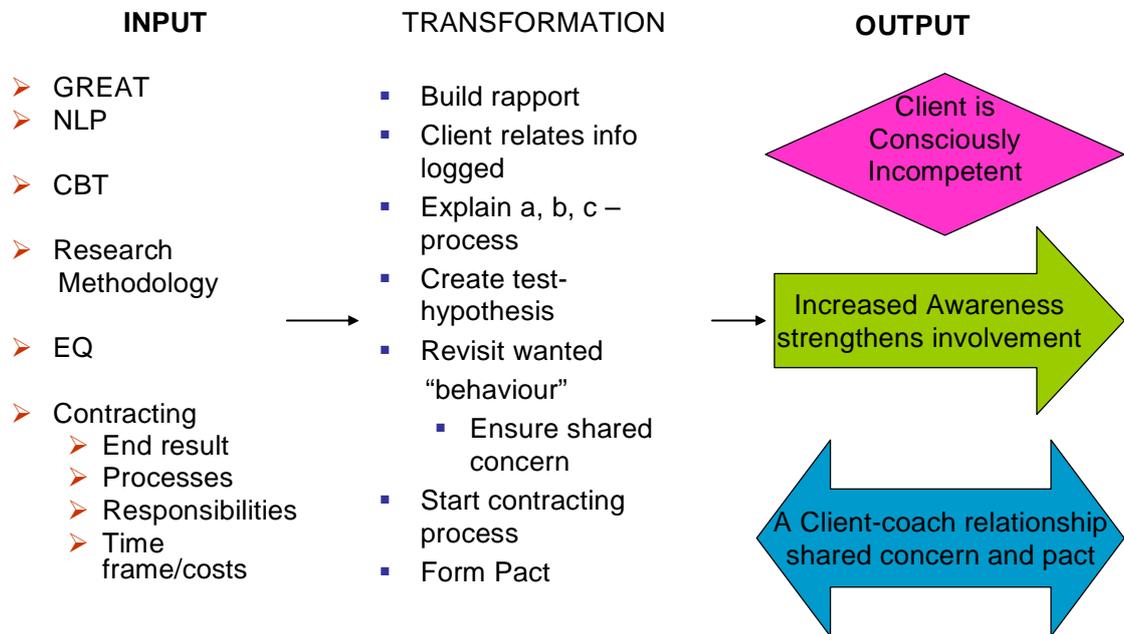


Figure 5 (continued) Personal coaching framework

Exploration Phase - CBT



Formulation Phase

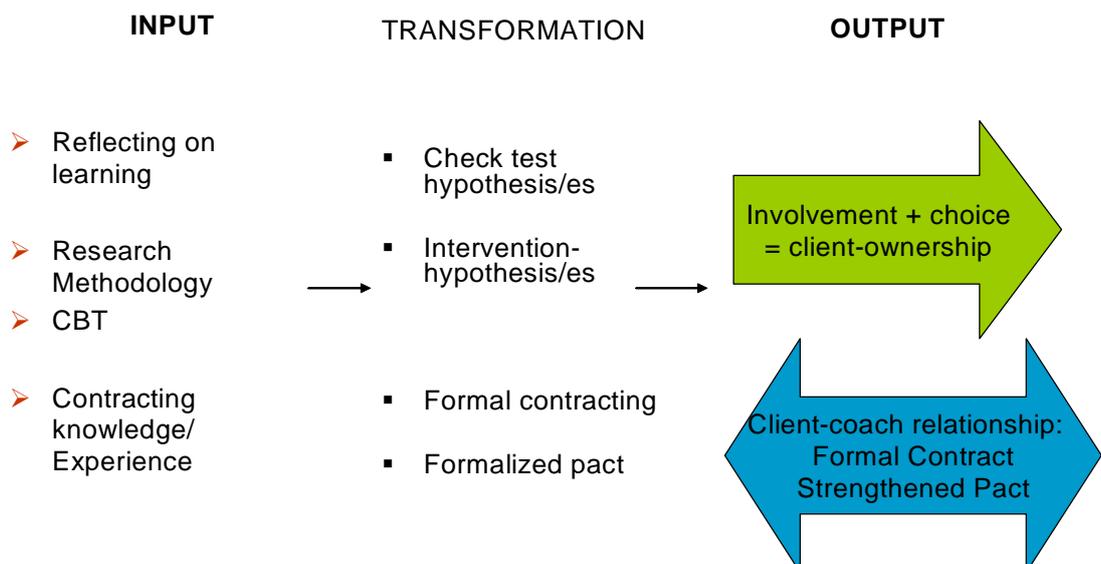
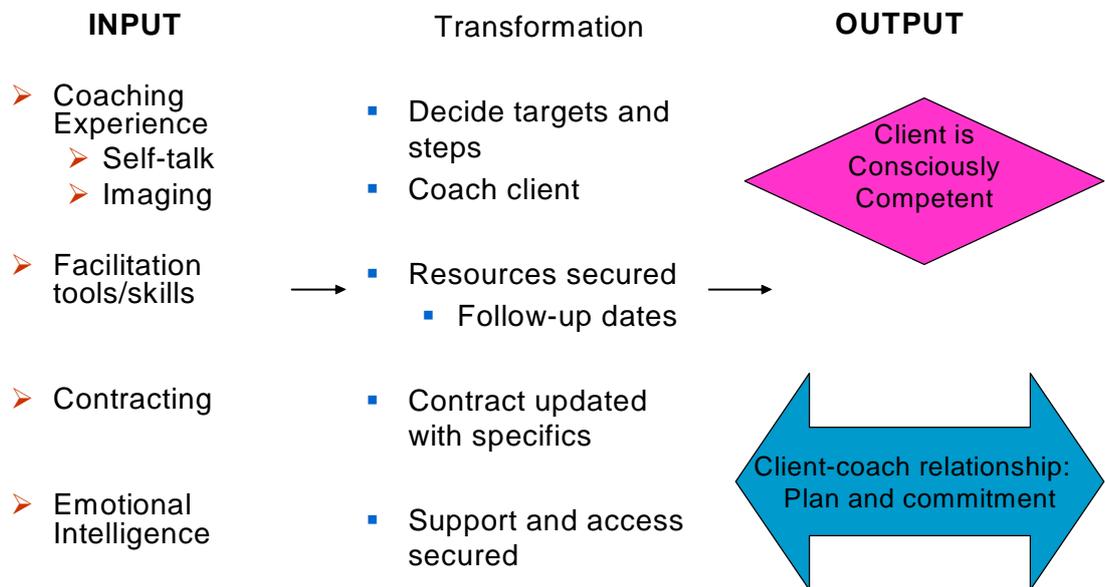
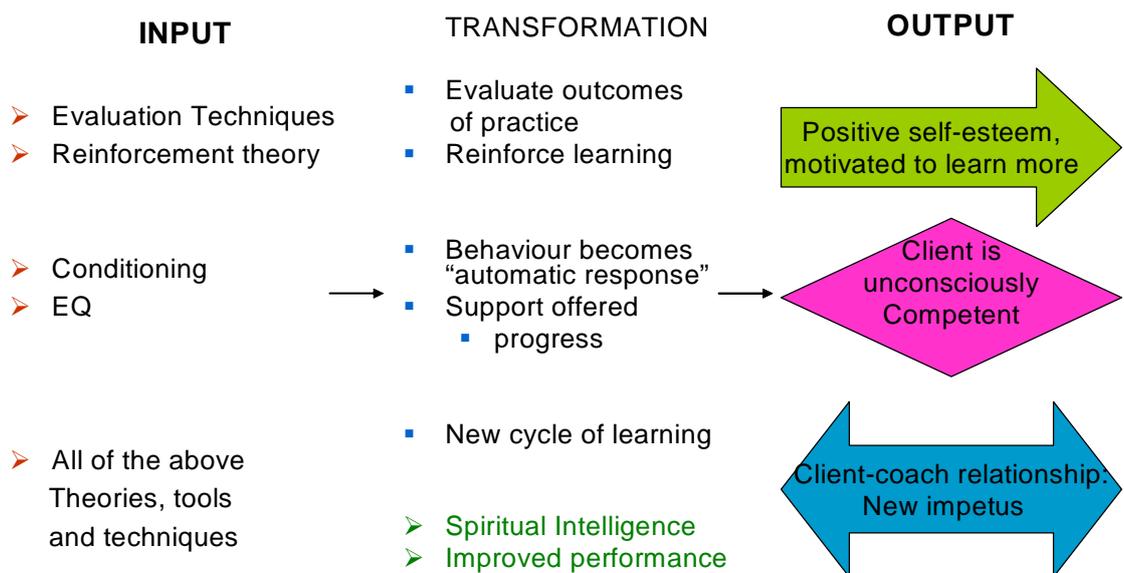


Figure 5 (continued) Personal coaching framework

Intervention Phase



Evaluation Phase



2.3 Education and work experience

Studying for my masters at a relatively early age, my choice of subject was heavily influenced by the then popular topic of stress management, and by the interests of my learning promoter. Little did I know that my journey through the corporate world and, in particular, my role as an industrial psychologist would eventually stimulate the development of my own coaching framework, with cognitive behavioural therapy as its foundation and spiritual awareness as an essential outcome.

The year-long process whereby I achieved registration as an industrial psychologist at the Health Professions Council of South Africa was both demanding and stimulating. I realised that every area of corporate and private life presents its protagonists with challenges that can benefit from the input of an experienced and patient other, if only as a sounding board for the bouncing back of ideas, ideals, frustrations and expectations.

I spent time in the corporate environment at three points in my career, while carving my own niche as trainer, facilitator and counsellor/coach in private practice. Playing these roles has ensured continuous challenges and personal growth in a coaching capacity, as my focus shifted from one industry to another and across geographical and cultural boundaries.

When contracted as a facilitator of learning, I followed up on my training sessions with either small group or one-on-one coaching to ensure learning transfer to the workplace, because this felt like the right thing to do. I realised that the most rewarding dialogues I had were those which happened after a training or facilitation session, with me in a coaching role. I felt responsible and excited by my personally assigned role of ensuring successful implementation and continued high motivation after a training intervention, through the integration of changing concepts, behaviours and practices with teams or individuals. This was a natural extension of my internal philosophy of learning, which was unconsciously at first, and then quite consciously, developing.

My intensive and extensive experience with assessment centres, first with the South African Transport Services (now Transnet), and later with the banking sector, highlighted the very individualistic focus of most assessment products and processes. The focus of assessment then, in the main, was to compare the individual and their performance or behaviour against a particular defined norm. Little concern was shown for how well the individual fitted into their current or prospective work teams, whether they shared the same values, work approaches or perceptions with regard to what constitutes “good performance”.

It was during this time that my Mentor, Mervin Carlisle, introduced me to self-assessment centres, a concept he had tried out and tested. This method empowered the assessed to take

responsibility for their own assessment, through very structured tools and techniques, while being supported by a well trained and experienced assessor who played a coaching role. The method was applied to natural work teams, with the result that team members were much more informed about each other's strengths and development needs. They realised opportunities for closer working relations and developed insight into the perceptions, norms, values and backgrounds of their team-mates, which resulted in a more close-knit team leaving the safety of the development centre environment to stand together as a stronger unit in the real working environment. Thus my early experience with alignment among teams, with regard to their individual values, perceptions and work practice, resulted in enormous personal satisfaction and a feeling of truly making a contribution to the organisation's management development drive.

Closely related to the above was the tremendous growth I experienced as coach to the managers of my organisation at the time. The "sit by Nelly" approach, which fostered self-insight for the "manager under development" because of their involvement in their own assessment of work-related skills and attributes, shaped all my future tasks in the arena of assessment as an industrial psychologist. All future endeavours in this line of work saw me including my client in the process of discovery with regard to the skills, attributes and behaviours which facilitated success for them - as opposed to those which caused them to under-perform, do harm to personally meaningful interpersonal relationships, and generally caused them to question the meaning of their own life and the contribution they made to society.

It was during my last corporate assignment with the Transmission Division of Asea Brown Boveri in South Africa, as Manager of Human Resources and Organisational Development, that I became aware of my own growing disillusionment with the corporate world. I realised just how important ethical conduct and respectful treatment were to me, and how much I desired to be of value to those numerous "successful people" who are intensely unhappy and frustrated in their search for life's meaning and purpose. Being part of an international organisation which accommodated people from a great variety of cultures, I noticed that there was a significantly lower level of conflict between team members who were from similar cultural background, compared with those members who hailed from diverse cultures. This realisation was of great consequence when faced with a restructuring project, integrating four independent business units into a complete project organisation. This restructuring process, although traumatic, saw a new combination of work teams based on skill but also on cultural grounds, which facilitated better team work and ultimately better performance and client service, and hence increased the profit of the organisation.

2.4 Personal approach to coaching and the choice of a research theme

2.4.1 Experimenting with coaching

I first began coaching in the capacity of intern industrial psychologist at a South African company called Transnet and later as a registered psychologist for a bank, where I was responsible for testing, assessing and developing people for various management and leadership positions. I used various forms of assessment, which were always followed up by feedback and coaching sessions for the individual involved. This procedure ensured understanding, insight and acceptance of the results and motivation for the process of “behavioural” adaptation.

Through these coaching assignments, I facilitated the processes by which staff members confronted and learnt to manage their own personal stress factors - such as low self-esteem, verbal and physical abuse, role- and inter-personal conflicts, non-performance, post-traumatic stress, etc. Almost by default, I learnt that the best possible application of my personal skills was in coaching linked to training.

As my coaching journey took me round Africa, Scandinavia and the UK, I became increasingly convinced that facilitating change in another’s mindset required a highly trusting, accepting, one-on-one relationship between that person and someone who really knows how to listen properly. The coach’s ability to fully accept the client for what he or she is becomes especially important when the client’s background (culturally, spiritually, socially and intellectually) differs from the coach’s own. This gradual but deepening conviction strengthened my belief that I really wanted to become, and indeed needed to learn more about being, a professional coach.

I enjoyed playing an instrumental role in other people’s progress towards realising their own potential, possibilities and choices; to watch their realisation lifted up from a static and unconscious level to become both conscious and mobile - in various directions. I wanted to make a contribution to my home country, South Africa, where there are so many people to serve, while continuing the work that I had started in Sweden. I realised that coaching was the area of excellence towards which I wanted to grow in future. It was here that I could develop a competitive advantage.

2.4.2 Early theoretical influences

Having completed my Masters degree in the field of stress management, I found myself coaching and counselling in life skills (stress, time and conflict management) early in my career. Looking back now, I recognise how the coaching of the a, b, c of stress management

(activators triggering beliefs, leading to certain consequences) stimulated the development of my coaching framework, with cognitive behavioural therapy (CBT) as its foundation.

As registered psychologist for the Perm Building society, my counselling skills were thoroughly exercised and tested, and I learnt about Neuro-Linguistic Programming (NLP), the art of building rapport and “getting into the zone”. Later my focus shifted to complete change interventions in client organisations, where I used a combination of facilitation methods to bring about organisational, group and individual growth. My developmental energy was poured into my quest to prove myself as internal consultant to the international company I was working for, and later as external consultant needing to get entry into both the facilities and faculty of those in power. The useful skills of partnering, selling concepts, marketing “who I was and what I had to offer”, and most importantly project management and contracting, received much attention during this phase, which spanned nearly 16 years.

It was especially my growing intrigue with the results which proper project management of consulting interventions led to, which facilitated my journey forward into the next phase of my development as a coach.

2.4.3 The decision to become a professional coach

My personal project “becoming a professional coach” was conceived in London in December 2003, at my first private tutorial with Professor Mike van Oudtshoorn (a South African living and working in London). Together we explored the different ways I might reach my professional goals, talked about what informs me, and my authenticity. We also discussed practical issues such as the feasibility of completing this work successfully on time, my financial means, stakeholders’ support, and how our working relationship could work.

For the first eight months of my journey with the i-coach academy at Middlesex in London, I worked under the supervision of Professor Mike van Oudtshoorn. I also worked with David Lane, author of a book called “The Impossible Child” (Lane, 1990) and key facilitator on the D.Prof programme, especially with regard to the research involved in my studies. This was very exciting. Meanwhile, I actively coached my own clients, students of the i-coach programme and personal contacts, and attended various modules (as well as supervision) which all proved useful in the development of my own authenticity as coach. Moreover, I took on special developmental projects within my client network, which gave me the opportunity to do significantly more coaching than my role originally allowed. I met Danah Zohar and Ian Marshall, the pioneers of “spiritual intelligence” (Zohar and Marshall, 2004), and learnt more about this fascinating new focus for coaching. I also had the privilege of receiving input from

three fellow students at the academy, and found this to be of great help. All of the above made my progress towards becoming a professional coach highly exciting and rewarding.

2.4.4 My learning journey with the i-coach academy

My D.Prof degree programme with the ICSC and Middlesex University is part of the process by which I intend to become a professional coach, under the skilful supervision of a highly respected person, providing me with the guidance necessary to facilitate my learning and growth. My involvement in the learning days (modules) and my extensive coaching activities have clarified my personal strengths and made me understand what I need to develop further. It has also helped me define a personal approach and authenticity. This, in turn, has helped me to refine my research proposal, which I presented successfully to the DPS Approval Panel at Middlesex University, as a way of moving on to the second phase of my doctorate.

Active participation in the learning days which formed part of my learning journey with the i-coach academy has enhanced my ability to reflect on my learning. My ability to write reflectively and then to reflect upon what I have written saw much improvement, and insight into various methodologies and theories related to coaching was gained. All this would play a critical role in my further development as a professional coach on the doctorate programme.

The research phase of my doctorate has allowed me to put all my new-found knowledge and competence to the test. It has helped me to integrate the many and varied coaching roles which I have undertaken since I started to practice as a professional coach. With this research, I was hoping to make a significant contribution to the establishment of coaching as a profession, while carving out my own niche and making my presence felt in the main geographical area where I intended to be professionally active. Ultimately, I aim to demonstrate my competence by reaching the expected learning outcomes which would qualify me for a Doctorate in Professional Studies.

With regard to developing my personal approach to and style of coaching, I could use my personal framework (outlined in Figure 5 above) as a guide to reflect on the appropriateness and value of my research ideas. The process of exposing my learning memories of alternative periods of constructive growth and hardship to the light of my own critical reflection provided a fertile testing ground for my personal beliefs and intentions. It made me realise my personal strengths, and especially my need to develop towards becoming a professional coach.

It took significant discussion with both David Lane and Mike van Oudtshoorn to decide on a workable title for this research project, from which the overall approach to my research became much clearer. Further clarification came with the realisation that it would be unrealistic

to aim for a cultural change within the time span available to me for my doctoral research. It seemed more realistic to aim for an agreement regarding the preferred culture within an organisation. The presentation of the theoretical module on research methods by David Lane illuminated my mental picture of this research. Thanks to feedback from colleagues and fellow students, I became more confident that my research ambitions were feasible.

2.4.5 Personal learning theories which shaped my coaching framework

During the presentation of my coaching model to my fellow students at the i-coach academy, I made a statement about wanting (as coach) to facilitate stronger ethics in organisations, upon which one of my peers asked “Whose ethics should be used as a measurement when working with company values?” After some discussion, we concluded that it would require an agreement among those who lead the organisation as to the values with which they all are comfortable. My role would be to ensure that agreement is reached among the leaders of the organisation regarding the values which they want to portray in their business, using coaching as the vehicle.

Reading about the importance of having a shared concern in “The Impossible Child” by David Lane (1990), I remembered an unsuccessful intervention I experienced at the school where my child gets her formal education. After careful reflection on the varied behaviours of all the stakeholders involved, I realised that what was missing was a shared concern:

- the teacher thought my child had an attention deficit disorder;
- I thought the teacher was incompetent;
- the principal was convinced that the school psychologist was not doing his job; and
- my daughter was fearful and suspicious of the process, with the result that she withdrew completely from it.

Subsequent to this realisation, I have coached several clients where a shared concern was established during the first two sessions, and this significantly enhanced my ability to build rapport.

Harrison (1987) captured my imagination with his perception of business being a tutor in competitiveness and action-orientation, which are essentially autonomous left-brain activities, and his passion to be the tutor of “love in the workplace”. Roger Harrison dedicated most of his time and energy as consultant to teaching leaders how to deal with complex living systems such as humans, groups, organisations, etc., which essentially requires the building of nurturing relationships, a willingness to cooperate, and an appreciation of interdependence.

Much conviction was drawn from Mary Beth O'Neill's (2000: 10-11) systems theory, which made me realise the interdependence of organisational systems and processes, and especially the impact that the environment has on any executive's choices and decisions and subsequent behaviour. To view their actions in isolation from their team and organisational or divisional culture could lead to a strengthening of the down-side of individualism, of which Harrison is trying to raise our awareness.

On the subject of awareness, John Whitmore is the master! Whitmore (2003: 155) sees raised awareness and responsibility as the first stepping stones of a coaching approach focused on improved performance. With regard to team coaching he advocates a definition of common goals, based on some ground rules on which the team should reach agreement, as an absolute must to foster cooperation towards the envisioned future direction.

According to Zohar and Marshall (2004: 28), who take alignment to a whole new level, when people's values are aligned to each other and in congruence with their own inner spirit, wealth can be created that is aimed at making the future of humanity sustainable, as well as wealth that nourishes and sustains the human spirit. In similar vein, Harrison (1995: 8) suggests that "as organisations respond to the demands of customers for more personal service, opportunities to operate from an open heart may increase".

2.5 The personal context of the research project

During 2002 to 2005 I managed an international project for the European Union and the Swedish Government. Its main aim was to set up a new supply chain for the automotive industry in Scandinavia. This project saw the successful partnering of seven totally autonomous companies, which put together, served a key purpose in the automotive supply chain, from the marketing end to the servicing end. My role was that of strategist, negotiator, coach, trainer and facilitator, with the purpose of reaching a working agreement among all seven of these companies and preparing them for participation in the international business arena.

During the initial phases of this project, I realised that an intense process of both group and individual coaching was the only way to achieve congruency in their way of working. Once this congruency was achieved, my focus shifted to the training and coaching of selected, key individuals and small teams in the processes of forming new international partners. Among other things, this involved appreciating cultural differences and overcoming language barriers. I used coaching, combined with some training, as the vehicle to achieve learning transfer.

Upon reflection on the accolades my project management ability received in a foreign country, I identified a factor which was probably my biggest ally: the fact that all the companies in the newly-formed supply chain were of the same culture, spoke the same language, and had the same business ethic.

As described in Sections 1.3.2 and 1.4 above, at the conclusion of the EU project mentioned above, I approached Epsilon, one of the independent Swedish companies involved in the new supply chain which had been created, and whose business I had come to know quite well, with a view to doing my doctorate research in their organisation. This company was of particular interest to me since it was undergoing a transition and needed to integrate the cultures of six different business units in order to achieve alignment. Here was going to be my new challenge. The constant factor, again, was going to be that all the stakeholders were Swedish. The challenging part was that there were six business units, each with its own distinctive business culture, and the MD of Epsilon apparently wanted one homogenous company culture. High on my agenda at this point was to scan the literature on my “subject in the making” with regard to support for agreement among the members of leadership teams as to their collective values which would ultimately shape their organisation’s culture.

2.5.1 Literature review of Scandinavian business culture

My choice of reference materials on Swedish business culture and work ethic were influenced by the business milieu I found myself in at the time of my research and the cultural background of the client organisation with which I was working. I conducted my research with a Swedish organisation, and therefore Scandinavian publications were of particular relevance.

An internet article published in HIT business communication claims that a company’s culture decides its fate. The author of this article strongly believes that any company which deliberately builds a strong culture aligned with the company’s strategy, goal, business ideas and expectations from customers, will be successful, because (www.business-comm.nu/corporate_culture_.html):

- a positive and strong culture attracts and keeps highly skilled staff;
- the will and energy created by a strategically developed company culture becomes the company’s biggest asset;
- customer relationships are strengthened; and
- the number of customers increases, as do profits.

In support of the above view, a number of general articles on ethics for business and leadership present a strong opinion on company culture being a deciding factor in the long-term success of organisations, since they are guided by core values.

Mats Alvesson (2002: 105), a well-known Scandinavian author, sees leaders as working agents who use culture as a medium to target action. He is of the opinion that leadership is culture-influencing in that it represents the management of meaning, and therefore has a significant impact on the cultural values and orientations of organisational members.

The leader of an international company, MacGregor, situated in Denmark, holds the view that we too often explain failed business initiatives in rational and structural terms, while we should be focusing on the values and perceptions of the leaders of such initiatives (www.affarsvarlden.se). He involved a psychologist/coach in helping his organisation achieve (as he called it) a “psychological turnaround”: a process whereby communication, creativity, cooperation and business ethics were consciously developed among the leaders of the organisation. The rationale behind this process was that if leaders could trust each other 100 per cent and show mutual respect through open communication, this type of culture would (and in fact did) filter down throughout his organisation.

James Gehrke, president of a company called Magnify Leadership and Development and a European expert on curriculum development for leaders, reflects upon his personal experience within an organisation where a cultural shift had to be driven by leaders who were unable to re-orient employees to the new behaviours needed for the company to retain its competitive advantage. He attributes this failure to an inability of the leaders to communicate the much-needed behavioural changes in a convincing manner (http://EnzineArticles.com/?expert=James_Gehrke).

Holmberg and Åkerblom are of the opinion that culture is constantly reproduced through actions, and that some actors have more influence than others on the forming of a culture (www.hhs.se/CSL/People/ingalillHolmberg.htm). Leadership is seen by them as a cultural expression: “The belief that cultures vary means that different conceptions and expressions of leadership can be expected”. The choices leaders make with regard to the preferred organisational culture facilitate the resulting expression of this culture, as perceived by the rest of the organisation.

A Swedish business report titled “Driving Corporate Culture for Business Success” (www.marketresearch.com/researchindex/710493.html) promotes the use of a best-practice template for building an adaptive, dynamic corporate culture which supports the organisation’s business goals. It blames the failure of most business improvement initiatives on neglect of the underlying cultural issues involved in the process. This is significant insofar as it underpins my reasoning that corporate culture and values are crucial to leadership success, and that a group of leaders need to agree on what they want the culture to be, so as to foster the development of such culture in support of their business initiatives.

On its website, the mother company of my client organisation reflected the importance of four specific values to the complete organisation: involvement, expertise, evolution and ethics (with the focus on trust). The company perceived cultural diversity as the best way to generate a dynamic environment at work. The client organisation had, in fact, shown its commitment to finding out what their culture should be, and agreed to use coaching as a tool to do so, when they signed a coaching agreement for the implementation of this research proposal on 8 October 2004.

2.6 Objectives of the research project

1. To investigate the use of coaching to facilitate agreement, among all members of an executive team, regarding the preferred culture in the organisation.
2. To map out the coaching steps developed in the process of facilitating agreement among all members of an executive team, regarding the culture that they prefer to have in their organisation.
3. To investigate, through coaching, those indicators which would reflect the preferred culture of the organisation.
4. To gain insight into the perception of both the existing and preferred cultures of the organisation by staff members at lower levels of the organisation.
5. To define a list of personal and team indicators/behaviours that would reflect the preferred culture within the organisation.
6. To define a set of personal (individual) and a set of team goals aimed at the implementation of leadership practices that would facilitate positive growth towards the development of the team's preferred culture.

The outcomes of the above should enable an assessment of how effectively coaching was and can be used to obtain agreement regarding the preferred culture within an executive team. The results reached at the end of this study should also render useful guidance to other coaches working in the arena of organisational culture. It would certainly provide insight into my own coaching approach, of which both positive and negative lessons learned would be welcomed with an open mind. I would also hope that it would shed light on the path to be travelled in reaching agreement among a team of executives with regard to the culture they would prefer to have within their organisation.

Chapter 3 provides the reader with a thorough explanation and justification of the theoretical and methodological approaches selected for purposes of successfully meeting all of the objectives mentioned above.

Chapter 3

Theoretical and Methodological Approach

3.1 Introduction

In this chapter I explain why I decided upon the particular theoretical and methodological approach applied to this research project. The various options I considered receive attention (since some of them, at first, seemed like obvious choices), while the focus is on the suitability of the chosen methodology, the ethics which foster its effectiveness, and the practicalities with regard to the collection and application of data which the chosen approach made possible. I explain how and why I used project management as a master system to plan, manage and log research activities, outcomes and reflections.

3.2 Phenomenology as chosen theoretical approach

My intention with this part of the chapter is to explain why phenomenology, as theoretical and methodological research approach used in the project, was relevant, viable and personally meaningful.

Having read many views and definitions of phenomenology, I started to form an understanding of a phenomenon as a concept which represents an appropriate starting point for any investigation. I realised that it is our perceptions of things which constitute their appearance, and that the science of phenomenology seeks to find valid interpretations which are open to verification.

It has been suggested that phenomenology has at least three primary meanings in philosophical history, derived from the writings of Hegel, Husserl and Heidegger. These were particularly valuable to the author in deciding upon phenomenology as method of research, especially the meaning attributed to Hegel (<http://en.wikipedia.org/wiki/Phenomenology>):

“For Hegel, phenomenology is an approach to philosophy that begins with an exploration of phenomena (what presents itself to us in the conscious experience) as a means to finally grasp the absolute, logical, ontological and metaphysical Spirit that is behind phenomena”.

The same source summarises the work of Husserl who described the main characteristic of consciousness as intentional. It goes on to explain that every mental act is directed at or contains an object and closes with the statement which had a profound impact on the authors

choice of phenomenology as method of study: “Every belief, desire, etc, has an object to which it refers: the believed, the desired” (<http://en.wikipedia.org/wiki/Phenomenology>).

The third definition found to be useful was provided by English and English (1958: 387): “In its broadest meaning, phenomenology is a theoretical point of view that advocates the study of direct experience taken at face value; and one which sees behaviours as determined by the phenomena of experience rather than by external, objective and physically described reality”. This particular definition suited the focus of my research topic, which used coaching as a vehicle to explore my clients’ experience of behaviours and situations. Their own perceptions were the key, rather than my interpretation of what they were experiencing.

As I begun my search for a research methodology which would render both valid and reliable results, three distinguishable features of the phenomenological research method as described by Curtis (1978) whetted my appetite to know more about it:

1. A belief in the importance and primacy of the subjective consciousness.
2. An understanding of consciousness as active and bestowing of meaning.
3. A claim that we gain knowledge of meaning mainly through reflection.

I went on to explore how these features were appropriate to my particular research theme: “The use of coaching to get agreement regarding the preferred culture, within an executive team”.

3.2.1 The importance and primacy of the subjective consciousness

My understanding of phenomenology is that it studies an individual’s direct experience of situations, which facilitates the possibility that their personal interpretation of situations and events could be explored. Since my plan was to research the perceptions of a particular group of people of their organisational culture, and in particular the leadership and managerial behaviours which constituted it, I realised that I would work with the subjective conscious of my client(s) in an effort to discover the personal meaning that these have for them. While facts form part of the objective part of our beings, meaning is formed subjectively. For these reasons, phenomenology as a qualitative process was appropriate, since my subject was organisational culture and its underpinning values.

To understand the subtleties of my clients’ culture I needed to find out how the various individuals collectively forming the executive team of the client organisation consciously experience the organisational culture. This should be evident in their many and varied personal experiences and interpretations of actions, words and events, and the causes and consequences of these in the form of human responses.

3.2.2 Consciousness as active and bestowing of meaning

Human beings continuously form new meanings of things, events and experiences, which grow, change shape and evolve into yet newer meanings. It only takes us to question, in our own minds, the significance of something, when this process of “searching for meaning” comes alive again and the process starts all over again. Moustakas (1994: 65) summarises this process well when he says that “the whole process of being within something, being within ourselves, being within others, and correlating these outer and inner experiences and meanings is infinite, endless, eternal. It keeps us forever awake, alive and connected with what is and with what matters in life”.

For each member of the executive team of my client organisation, the whole process of being within the organisation and its reigning culture, being within themselves, being within others and correlating these outer and inner experiences and meanings were infinite, endless and eternal. As researcher I was going to capture their experience and interpretation of their organisational culture at a point in time, and through the personal meaningfulness it has or does not have for them, and explore a view of the way they want it to be at a future point in time when it would have more meaning.

3.2.3 Knowledge of meaning gained through reflection

My understanding of reflection is that it is a series of activities through which we make sense of our experiences, based on our own evidence (interpretation of what happened). After having reflected, we are better able to construct our own description of what we felt, thought and experienced.

In my particular study it would be the unique perception of values in terms of beliefs, behaviours, practices, sentiments and feelings, and how these related to the values of others, which would be the essence of discovery. I consider personal perceptions key to a meaningful conversation regarding values. For example, we may say that we value openness, but what does it mean? Everyone has their own image of what openness looks like and how it features as behaviour in our day-to-day dealings with others. What would be useful is for people (especially when expected to work together for the sake of reaching a common goal) to reflect on and share what these images of openness look like, and which behaviours they identify with when it comes to being “open”.

Of special interest to me was the journey through which the participants of my research would find meaning and purpose, and the role played by personal values and relationships (how and why they relate to others and in particular their response to the particular culture they operate in.) To discover the answers to this, I decided that it would be useful to do the following:

- To map out the process through which agreement would be reached among all members of an executive team regarding the culture, or combination of cultures that they prefer to have in their organisation
- To investigate through coaching those indicators which reflect the preferred culture of the organisation.

The phenomenological choice required a trusting relationship between researcher and client which had already been established. My concern had to do with how I, a well planned individual who preferred to control the unknown, would experience the application of a qualitative methodology which proposes to make sense of other's experiences, instead of a quantitative method which seemed more objective. To make absolutely sure that a more suitable methodology had not been overlooked, I researched other options carefully.

3.3 Research strategies which I have considered, but rejected

3.3.1 Action research

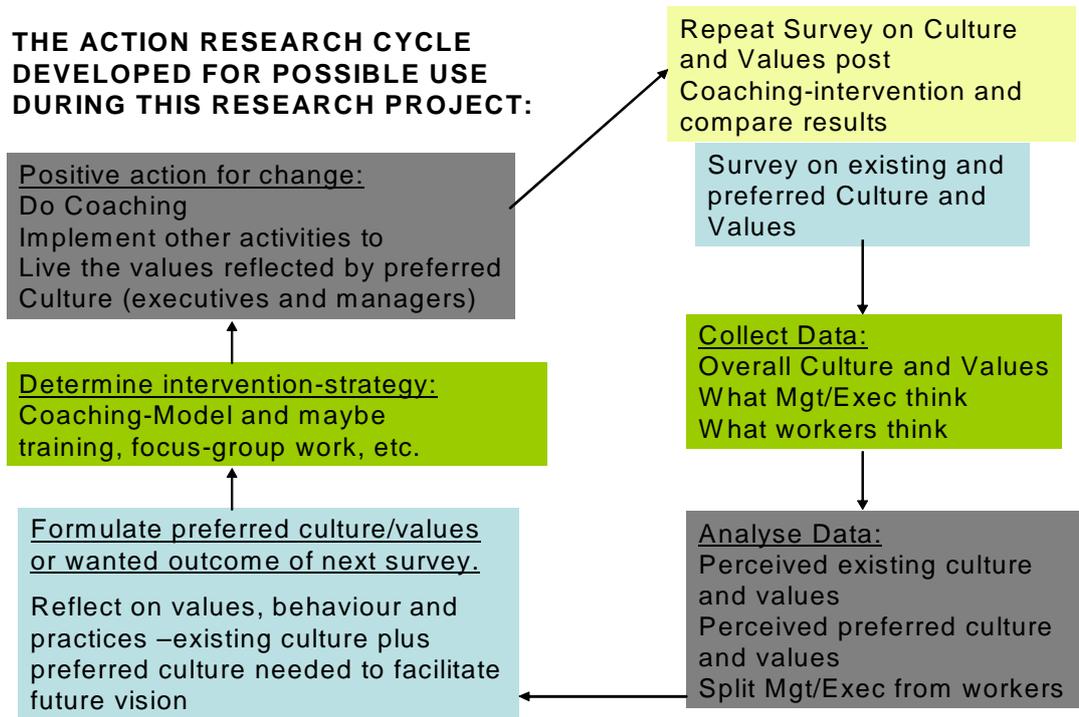
My interest in action research was originally awakened by a description of Kemmis and McTaggart (1992: 16) that it was useful when dealing with the culture of groups, defined by language, social actions, etc. Action research was originally rejected since the aim of this research was not to bring about a shift/change in organisational culture but merely to reach agreement regarding a preferred culture which would be more meaningful to the members of the executive team of the client organisation. If an actual shift in organisational culture was expected a research method which is both qualitative and participative such as action research could have been useful. If applied, it would have begun with a questionnaire, measuring the current culture and values of the executive team of the client company, with the aim of using coaching as a means to shift the values of a significant number of executive team members to reflect the "wanted culture and values". However, since a shift in organisational culture was not expected over a short a period as 6 months but an agreement amongst team members regarding a preferred culture, phenomenology was considered to be a more appropriate choice.

When reconsidering my original understanding of Elliott (1978: 355-6) that action research is good when focusing on practical issues which have been identified by participants and which can be changed, action research could have been a viable alternative approach. Without any steering or directing from my side the process which I, as coach, embarked upon with the team of executives progressed beyond the point of agreement regarding a preferred culture. It progressed to the point where a set of workable leadership- practices, which would be exercised by each member of the executive team in a collective effort to facilitate the preferred

culture agreed upon by them all, was agreed. Whether leadership practices could be called “practical” I am not clear on yet, but if so, action research may well have been an alternative methodological approach and certainly one to consider for use on prospective processes where cultural shift seems viable and possible.

At the outset of my research I could only hope but certainly not expect the executive team members to reach agreement sooner rather than later in the process. I expected it to take much longer to explore the individuals and their collective perceptions of the meaningfulness of a preferred culture and the leadership indicators which would be indicative of such culture. In reality, agreement was reached very soon and the process evolved into a stage which saw the setting of team and individual goals pertaining to the practising of agreed leadership behaviours which were commonly perceived to have the potential to facilitate the development of the agreed preferred culture. In fact, because of the phased approach used to address the agreed leadership issues, much progress have been made on the issues having been explored during the earlier phases of the process, since these received focused attention during one-on-one coaching sessions and time allowed for the exploration of these with consequent positive shifts in behaviour having been reported by the end of the research process both on individual level and in team context. Again whether the so-called progress was enough to justify a shift in behaviour and there for organisational culture would have been a complicated question to address, in my own mind.

Figure 6 The action research cycle developed for possible use during this research project



3.3.2 Soft systems

The aim of this methodology is to make changes which are both systematically desirable and culturally feasible. Although very similar to action research, soft systems methodology places more emphasis on analysing the problem and possible solutions before any action is taken. My intended research did not have the implementation of change during the research as its key focus, and my intention was not to analyse problems and search for solutions.

Furthermore, I was not going to analyse a problem, but merely explore my clients' perceptions regarding their organisational culture, both current and preferred, which definitely does not constitute a "solution", but yet another perception of reality through the eyes of my client. For this reason, a soft systems approach was not seen as appropriate.

3.3.3 Experiments

This method involves the creation of an artificial situation, in which events that generally go together are pulled apart, participants are called subjects, and variables need to be controlled. This would be totally unsuitable for the purposes of my research, since the heart of this study concerned human values and organisational culture. The manipulation or control of any variables that influenced these values and culture, or those who experienced them, could distort research findings and render them invalid. My fear was that statistical methods may impose some pre-chosen theoretical constructs, thereby restricting myself as researcher to gather the full meaning of what I was about to discover. For my clients to voice their innermost feelings with regard to those perceptions, view and values which they held dear, an imposition of any restrictions would be taboo. Thus experiments were not appropriate to achieve what I had intended with my research.

3.3.4 Case studies

Case studies are useful when the aim is to make theoretical statements, supported by evidence. This method is ideally suited to the resources and environment of a work-based researcher, a role which I would not be playing during my research.

For case studies to work well, it is important for events and situations to be allowed to speak for themselves rather than to be largely interpreted. With regard to the research I was about to conduct, the very focus was on my clients' interpretation/perception of reality, and therefore I did not deem a case study approach to be appropriate. Furthermore, one of the main weaknesses of case studies is that they are "prone to problems of observer bias, despite attempts made to address reflexivity" (Cohen, Manion and Morrison, 2000: 184). In Section 3.4

I make it clear why an approach which does not foster reflexivity could not work for the purposes of my research.

Lastly, for the purposes of this research project, the individual experiences of people within the team context are my main interest. I concluded, therefore that the context would be too broad and deep to be of value in a case study. For more detail regarding my particular reflections on the various research approaches I considered, please consult the reflections with regard to research methodology in Appendix A.

3.4 Addressing the issue of ethics

The researcher has the biggest role to play in ensuring that research results are valid and reliable. There is the possibility of ethical dilemmas occurring when data is collected and findings disseminated, especially in regard to the researcher-participant relationship. Merriam (1998) warns that this relationship, together with the aim of the research, determines how open the researcher will be concerning the purpose of the research, how informed consent can be of use, and with what degree of privacy participants will be handled.

In my case, the client organisation had recently gone through major changes and was still in transformation. This was the first time that an investigation was to be carried out by an outside coach. The executive team wanted to determine how stakeholders (with a particular focus on internal customers/employees) felt about the organisation and management – a sensitive issue, which had the potential to create differences of opinion and possibly conflict. They reported that there was no hesitation on their part to explore how people perceived their organisational culture, and that they would not mind the writing-up of findings in my doctorate research project.

My approach to rendering meaningful results to the client organisation, at the same time dealing with sensitive issues in a confidential and professional manner, included entering into an agreement with the executive team of the client organisation. This team would naturally be both the sponsors and the gatekeepers of this process of the client company. The agreement addressed ethical issues, and specified measurable outcomes with deadlines as well as the roles which would be played by both researcher and client (see the agreement with Epsilon included in Appendix B).

Furthermore, permission was requested and granted to use the findings of the research project when writing up my doctoral research. This document served to grant me, the author, permission to use the client company's name, but not the names of the individuals involved in

the study, nor the content of the coaching sessions conducted during the research period. For more information see the agreement with the MD of Epsilon regarding the use of findings of my doctoral research conducted in Epsilon Industrikonstruktioner AB in Appendix C.

My position in the client company was that of an independent outside consultant and coach. I did not wish to become an employee, but intended to conduct and conclude the research necessary for the completion of my doctorate in executive coaching/professional studies. The research conducted in this organisation formed part of a package of services for which I was to be paid. I was thus not an insider researcher; this is the continuation of a relationship which started two years prior to this research, and was based on mutual goodwill and recognition of the achievement we had achieved collectively.

The roles I would be playing, while applying myself to the process of reaching agreement among the members of the executive team of my client company regarding the preferred culture for the organisation, were that of:

- Facilitator of group processes aimed at discovering, discussing, understanding and deciding the indicators of their company culture.
- Trainer, in that a specific questionnaire would be used to determine both the existing and preferred cultures within this team, which would call for knowledge and skill to complete, score, interpret and understand the results.
- Coach supporting individuals as well as the group to reflect on the meaning of values and behaviours (beliefs, sentiments, emotions and actions).

As to ethical conduct in a coaching context, contracting with the client around ethics and confidentiality would be the first step in building a trusting and open relationship. In my personal coaching framework, contracting happens during either session one or session two, after a shared understanding has been reached as to the issues which need addressing. To keep to my own ethical code for coaching, the scripts and recordings made of individual coaching sessions during this research project could unfortunately not be appended to this research project, but only the coach's summary and reflections upon the sessions. (Refer to the coaching contract in Appendix D.)

The elements which constituted my personal contract as coach with my client included:

- Mission statement.
- Philosophy.
- Practice.
- Beliefs.
- Ethical and Professional Code of Conduct.

- Confidentiality/Privacy.

The content of the above elements constitutes a statement of intent which represents my “signature presence”, i.e., that which I bring to the coaching relationship (O’Neill, 2000), and which offers a unique approach based on the personal values which underpin ethics and confidentiality for me. Should the client want to add their value statements, room is provided for these. Should any prospective client’s values and life-orientation be contrary to my personal beliefs and orientation, I would reconsider the appropriateness of my coaching services to my prospective client and refer him or her to another, more suitable coach.

With regard to confidentiality, it is specifically recorded in my coaching contracts that the coach may acquire in-depth knowledge and information relating to the operations of the client and the company the latter represents. It is further recorded and acknowledged that should such knowledge and information be made available to a competitor or used by the coach personally, it could cause the company and/or the client damage or loss and compromise the company’s competitive edge. Therefore, my coaching contracts stipulate that all documentation and material used for coaching is to be treated with confidentiality and to be returned to the client before the departure of the coach upon completion of the coaching services to the client. In addition, it is agreed that I will maintain the utmost confidentiality while fulfilling my role as coach.

Both my position in the client organisation and the roles which I would be expected to play highlighted the need for self-reflection, which is defined by Wolf in Merriam (2002: 117) as having sensitivity, self-awareness and confidence to understand how the research process is unfolding and to be able to distinguish between decision and recognition, with the focus on the latter. A conscious effort was made to reflect upon each and every event which required my interaction with either an individual client or the complete executive team of the client organisation. I needed to be alert to human subjectivity (my own and my clients’) and the power of perception (as the only reality) while undertaking my research. I was also aware of the possible tension that the playing of various roles could have on me, and I would attempt not to confuse these roles in order to render reliable results. It would be imperative to remind both myself and my client, with every event, of the role that I would be playing in that particular setting, in order to manage my client’s expectations and ensure objectivity on my behalf, as far as possible.

With regard to ethical conduct with specific reference to my prospective client, I made sure of my readiness to use this approach in an ethical way, by ensuring that I would comply with the following principles:

- That I, the coach, in applying my own coaching framework, am authentic with my client and that I contract individually with each member of the executive team in terms of the confidentiality of our relationship, over and above having contracted confidentiality of the overall findings in the agreement mentioned a while ago.
- That I know what informs me and share that openly with my client.
- That I have clarity on the purpose of coaching, my own beliefs, values and perceptions.
- That I have my own unique approach to coaching, which can potentially reveal and confirm that the client accepts this.
- That the executive team of Epsilon is able to communicate a vision of their preferred culture and values that matches their true wishes for the future.
- That I, the coach, am proficient at facilitation in order to confirm the “existing” and “preferred” culture and cultural indicators with the executive team.
- That the process (to be developed) fits the purpose of the client, and that is “to reach agreement on the preferred culture within its executive team”.

3.5 Planning for the collection of data

In this section the project management planning and management tools applied to complete this research project in the limited time at my disposal, will be described. A summary of the data gathering techniques selected, with specific focus on how I planned to use the collected data and which objectives these relate to, will be provided to.

3.5.1 Information management process

I chose to manage my complete project using professional project management techniques. My reasons for this were threefold. Firstly, I am an experienced project manager. Secondly, project management offers some very practical tools and techniques for the planning and management of an intervention, such as the one I was about to embark on. Thirdly, my client organisation dealt with engineering projects, is therefore comfortable with the language used by project managers, and prefers to work with the concepts of scope, milestones, objectives and outcomes (see Glossary of Terms in Appendix U for the meanings of particular project management terms). Although the executive team members did not know much about the coaching journey they were about to experience, the planning method strengthened their belief that the project manager knew what she was doing.

Project principles provide for the clarification of the purpose and overall goal of one’s project, followed by a very thorough scope document, which aims to contain the boundaries of the project. The ability to contain the scope of a project within boundaries which were, at this

point, unknown to me, sounded very attractive: since the inception of my research project, I was warned by both Mike van Oudtshoorn (my study promoter) and David Lane (my research promoter) to make sure that I contain the “scope” of the project.

My intention, at first, was to investigate the use of coaching to shift culture/align values in an organisation. Both Mike and David’s feedback was that it would be very unlikely, if not impossible, to bring about a shift in values or culture within the period available to do the research. My focus should instead be to get the preferred culture agreed by the leaders (i.e., the executive team) of the organisation. I therefore revised the title of the research project to read: “The use of coaching to obtain agreement regarding the preferred culture within an executive team”.

With my scope defined, I had a better feel for just how much work was going to be involved. I realised how tight my time would be, given that I had a signed agreement with Epsilon which was limited both in terms of time, but also in terms of availability of other resources. The best-practice project management skills I had developed over the years were very useful in this regard. I drew up a project plan, complete with milestones for every month and time allocated to each. I was well aware of the fact that the setting of milestones could be seen as contrary to the very nature of phenomenology, and steered clear of setting any specific measurement parameters such as would be applied in managing a work-based project. Since my client would only allow for six months within which to do this research project, it was felt that a milestone plan would ensure that we had a tentative route towards the end goal. The added advantage was that both parties knew roughly when specific resources (mainly people’s time) would be needed, which would facilitate planning and progress.

Progress was managed with the help of a Gantt chart (see Glossary of Terms in Appendix U), which indicated my use of the time allocated to each milestone. This approach offered me the opportunity to review progress having been made, as well as view activities planned for the coming month, to determine whether changes would be necessary (for example, allocate more time to a specific activity because it seemed to have taken longer than planned during the previous milestone).

3.5.2 Data gathering

The decision to use three methods of data collection was an attempt to ensure that my clients’ experience could be observed from various angles and in various settings for purposes of increased validity. The chosen three methods are an organisational questionnaire, coaching and reflections upon coaching sessions. I believed that my choice of approaches would allow me to study their behaviour from different “angles”. Both my personal reflections plus those of

the executive team members would add to the relevance of the data, only if my clients would be willing to take time out to do so, and should they be comfortable with such intricate activities. The recordings and transcripts of coaching sessions would be a meaningful learning tool, as it would allow time to reflect on both the process and content of coaching so as to ensure consistency in the level of reflexivity and objectivity applied during this phase of the research.

3.5.2.1 Sampling

The selection of people who would complete the questionnaire was relatively uncomplicated in the case of both sample groups. It was obvious that the executive team members of the client organisation would be involved, since they were the leaders of Epsilon and represented the various business units within the client organisation. The second sample group, who had to be representative of all business units, were randomly chosen. It was decided to invite (by email) the rest of the members of the organisation to take part in the cultural survey. It was further decided that two to three people from each business area, including head office, would be included. In fact, they were invited to participate on a first-come, first-served basis. The rationale behind this is that the executive core of the organisation should be able to compare its views with those of its internal customers (employees) so as to determine any significant gaps in perceptions.

With regard to coaching and the keeping of diaries for purposes of reflection, only the executive team members of the company were involved, since the main aim was to get them to agree to one or a combination of cultures represented in the questionnaire based on that suggested by Harrison and Stokes (1992), to be their preferred organisational culture.

3.5.2.2 Questionnaire designed to analyse organisational culture

People are fundamentally wary of any intervention and, as such, are likely to react against it where possible. Their reactions are based on their own values, beliefs and attitudes, or are influenced by the values, beliefs and attitudes of their leaders. According to Deal and Kennedy (1999: 4) these values, beliefs and attitudes form the bedrock of an organisation's culture, and represent shared convictions of what is important. These values translate into behaviours which are observable and recognisable. The behaviour of a group of leaders facilitates the development of an organisational culture, which could be studied by focusing on the leadership and management practices which in turn is facilitated by that predominant culture.

Several diagnostic instruments were considered to measure the culture of my client organisation, and for various reasons were not selected. The first instrument considered was called strategicalignmentsnapshot, which offered help to overcome the difficulty of ensuring

stakeholder alignment necessary for strategic direction. The instrument probes the perspectives of key stakeholders about the strategic choices facing the organisation, and proved to be useful for quickly assessing the executive team's views on strategic direction so that the team can move forward confidently with the implementation of strategic plans. What I particularly liked about this instrument was the alignment model on which it is based. It provides for alignment with regard to both strategy and culture, which is ultimately what my client company, Epsilon hoped to achieve. A drawback of the model was that its questionnaire focused mainly on strategy and reflected very little on culture. Just as importantly, this company offers no evidence with regard to the reliability and validity of this instrument called *culturestrategyfit* (www.saconsult.ca/diagnostics.html).

The Denison organisational survey was considered since it is based on a model which is claimed to speak the language of business. This survey focuses on management and organisational practices related to culture and leadership and is said to apply to all industries. At first it seemed a good alternative, but upon closer evaluation the language used appeared too sophisticated for a team of executives whose first language was Swedish, no matter how good their conversational English. Again what I found lacking was proof that instrument had been tested and shown to render reliable and valid results. This model on which this survey is based can be reviewed on www.denisonconsulting.com.

The third instrument I considered focuses on the relationship between patterns of action and the internal assumptions that drive behaviour. It integrates all its findings into a 360-degree feedback instrument which brings key issues to the surface, issues which a consultant or coach could use to access the client on a deeper level (www.theleadershipcircle.com). This instrument is very useful when working with single clients, since it offers a possible springboard for the intervention process. Yet, for the purposes of the research I had in mind, the questionnaire would be used merely as a trigger to get the executive team of Epsilon to identify their organisational culture. On top of this I needed to discover their perceptions not only of how things were at the time, but also of what things could be like in the future (i.e., current as well as preferred culture), which comparison is not addressed by this instrument.

The diagnostic instrument I finally chose to administer within Epsilon was designed to analyse organisational cultures. It has been successfully applied to develop awareness on the part of top management of both the existing and the preferred cultures in that organisation or team of people. It has been proven to be of tremendous value in identifying the differences and similarities in outlook between a leader and their colleagues. This instrument was selected because it has high face validity, in that people "feel" the scores reflect their experience of the organisation's culture. It also has construct validity, in that groups and organisations which are

expected to have different cultures on independent grounds, have predictably different patterns of questionnaire scores as well. Finally, it also shows predictive validity, since members of successful project teams rendered a high correlation in scores.

Harrison and Stokes (1992) give numerous accounts of successful projects of this kind. See Harrison and Stokes (1992: 27, 28) for specific scores on both the validity and reliability of this instrument. Its questions are designed to probe management and leadership behaviours, as experienced and perceived through the eye of the participant. In so doing it renders a practical approach to the issue of values underlying culture. Refer to the questionnaire measuring organisational culture (Harrison and Stokes, 1992) in Appendix E.

The results of this questionnaire are discussed in Chapter 4, and address the following two objectives of this research:

- To gain insight into the perception of both the existing and preferred cultures of the organisation as perceived by staff members on lower levels of the organisation.
- To define a list of personal and team indicators/behaviours which reflect the preferred culture within the organisation.

The data rendered by the application of this questionnaire would be used as impetus to both the group and individual coaching processes, but was not seen as significant in terms of content for and results of my research process.

Four distinct cultures are measured by this questionnaire. These are the power culture, the role culture, the achievement culture and the support culture. A short description of each by Harrison and Stokes (1992: 14-22) follows:

1. Power-oriented cultures are characterised by the following leadership style:
 - Strong and charismatic bringing courage to the faint-hearted and clarity to the confused.
 - Taking care of, rewarding and protecting loyal followers, and being wise and benevolent.
 - Acting unilaterally, although in the interest of the organisation and its members, and being demanding but fair in approach. Those who put the leader's wishes before their own, get ahead.
2. Role-oriented cultures have the following characteristics:
 - Individual performance is judged against written descriptions.
 - People are rewarded for being reliable and playing by the rules.
 - Clear objectives, systems and procedures provide the certainty required to for efficient performance, and are further enhanced by clear boundaries of responsibility

and authority for each member. Work methods minimise the need for individual decision-making and variability in performance.

3. Achievement-oriented cultures differ from the above in the following ways:
 - People share a sense of urgency to attain common goals.
 - Being a member of a team or group provides a source of strength. Team members manage themselves and often help out voluntarily where they see the need. Rules and regulations don't get in the way of performance; people work long hours without complaining and a strong sense of camaraderie exist.
4. Support-oriented cultures:
 - Foster a high level of cooperation. Lots of effort goes into ensuring that everyone is on board, conflicts are resolved and colleagues are listened to. People feel respected, acknowledged and cared for. They like coming to work and being with their co-workers, and appreciate each other's contributions.

The results of the survey would be collated and presented in: a number of tables, which would indicate distribution of scores for each culture; a group chart displaying the combined results; and a cultural index, which would compare (in bar chart format) the perceived strengths of the various cultural orientations (both currently and preferred) by participants in the survey exercise.

Epsilon stands to become richer materially and spiritually if its executive team can agree what their preferred culture should be. Their greatest challenge lies in avoiding the dominance of any one of the four cultures, and choosing a balance that enables the positive side of each culture to act as a counterweight to the negative tendencies of the other cultures.

3.5.2.3 Coaching

There is a contemporary tendency to think that the pioneering edge of our modern society lies in technical astuteness. When comparing the need for technological skills and knowledge with our need to be value-driven and clear about our life and purpose, it is clear that technology fosters communication, but not meaning. That is why, according to Belf (2002: 5), so many people are searching for meaning, for when meaning is established, old habits are likely to be tweaked and the risk of moving out of autopilot into new and fertile ground is taken.

For purposes of this study, I have adopted the definition of the International coaching federation for coaching (globalcoaches.com/files/definitions.pdf): "Professional coaching is an ongoing relationship which focuses on you taking action towards the realisation of your visions, goals or desires. Coaching uses a process of inquiry and personal discovery to build

your level of awareness and responsibility, and provides you with structure, support and feedback.”

According to Hudson (1999: 9-10), “values and purpose are most often the province of mature people who have been around long enough to transcend their intellectual skills and acquire trust in a coaching relationship, reaching out to a society of leaders and specialists.” This statement underpins my choice of coaching as the means through which to facilitate the search for values and meaning. Hudson (1999: 180) supports my case for coaching when he says that the seeds of change lie within us, and that we need to create the conditions necessary for the development of these seeds through “discussion with others which goes beyond our day-to-day work and deals with our deeper hopes and fears for our work, our organisations and our connections with others”. He believes that small-group discussions could provide the optimum conditions to nudge people to change through being exposed to views varying from their own. Furthermore he believes that these intimate conversations create the type of climate which offers mutual support transcending differences in beliefs and opinions.

During this proposed research process, a coaching process would be devised which should foster agreement among the members of an executive team as to their preferred organisational culture. To achieve this, a combination of group and individual coaching sessions would be held:

- Group coaching would be used as the means through which the values of the executive team, as it is reflected in the culture questionnaire, would be confirmed. The values of both the existing and preferred cultures would apply.
- Group coaching would also verify the indicators which reflect both the existing and preferred cultures of the organisation. It was hoped that team coaching would result in a set of team goals aimed at the implementation of leadership practices that would facilitate positive growth towards the development of the team’s preferred culture.
- Individual coaching sessions would be held to increase understanding of the research process, to ensure support for it and to establish goodwill with every member of the executive team. The envisaged end result was a definition of personal (individual) goals aimed at the implementation of leadership practices which would facilitate positive growth towards the development of the team’s preferred culture.
- Individual coaching sessions would be held for the purpose of establishing the meaning of the individual’s personal values and how these related to the values of the group.

Ultimately the results of the above coaching sessions should yield viable data to test the outcome of the last two objectives. This had to do with the evolving process and the possibility

of researching agreement with regard to preferred organisational culture through coaching. More specifically, it should provide the data necessary to:

- Investigate the use of coaching to facilitate agreement, among all members of an executive team, regarding the preferred culture in the organisation.
- Map out the coaching steps developed in the process of facilitating agreement among all members of an executive team, regarding the culture that they prefer to have in their organisation.

3.5.2.4 Research Diaries

The real value of reflection, facilitated by coaching and reinforced by diary notes, is that it should give individuals the space to learn and discover the personal meaning of values at their own pace and level – reviewing their values and deciding where they would like to be and what they would like to accomplish in the future (Hall, 1994: 245).

A research diary would be kept by me (the coach) to log significant experiences and insights prior to, during, and after research, facilitation and coaching sessions. Furthermore, participants who receive coaching would be asked to keep a diary describing their own experiences of the process. Should they feel in any way hesitant about or resistant to this idea, I would ask their permission to ask a few questions at the end of each coaching session, to determine their perception of what transpired during that coaching session. I was hopeful that the involvement of participants throughout the whole process would provide the necessary incentive for them to log significant and useful data. I was also hopeful that each participant's diary or feedback would reveal the writer's perspective on events and the feelings they had in relation to them. It was thought that the above would also generate insights into the coaching process itself.

In reality, though, my clients (members of the executive team) were both too busy to keep diaries, so instead I substituted these with reflective questions at the end of every coaching session (group and one-on-one) in order to allow for reflections "in the moment". I also started every consecutive coaching session with questions to allow for reflection on the previous coaching session, in case their reflections had changed or deepened from such time as I had seen them before (a sort of reflection upon their previous reflections).

Two definite benefits could be derived from this approach: I would not be method-bound, since I would be able to validate the findings of my clients from alternative standpoints. The use of contrasting methods should, according to Cohen, Manion and Morrison (2000: 112), also considerably reduce any consistent findings attributable to similarities of method.

3.6 Data analysis and use

3.6.1 Questionnaire data

The scored questionnaires would render data with regard to the current and preferred cultures as perceived by both groups taking part in the survey. The data from each group would be presented in three different data charts, each of which would tell progressively more about the meaning of the scores. Firstly, a distribution chart per type of culture would be created to show how every member of the team rated each culture. Secondly, a group cultural index would be compiled which indicated, at a glance, how the complete group perceived the organisational culture (both current and preferred). Thirdly, a summary of cultural scores would indicate the variances between how strong or weak the group wanted their preferred culture to be, and how strong or weak it was currently. This ultimately indicates how far from or close to the preferred culture the current culture (or combination of cultures) was.

The conclusions I hoped to draw from the successful administering of this questionnaire with the two above-mentioned groups should shed light on the following issues:

- Which of the four predominant cultures or combination of cultures (measured by the questionnaire) the two groups perceived to be the current and preferred cultures of the organisation.
- Which of the four predominant cultures or combination of cultures (measured by the questionnaire) the executive team would choose to be the preferred culture of the organisation.
- Whether there are any significant differences or similarities among the opinions of the team members who formed part of this executive team.
- Whether there are any significant similarities or differences between the executive team and the group representative of all levels of Epsilon.

The results of the executive team would be the predominant data, whereas the results of the survey completed by the representative or control group would be used to verify whether the rest of the organisation held the same view as the executive group with regard to their organisational culture.

Being acutely aware that the use of questionnaires is not phenomenological, I must stress that the results I hoped to achieve through the administration of this questionnaire would be used as an impetus to the coaching sessions I planned to do once a preferred culture had been identified. The questionnaire would prompt choices with regard to management and leadership behaviours. Since my coaching style facilitates the constructive probing of behaviours with a

view to uncover their underlying beliefs, values and constructs, these choices could be used to develop appropriate questions for use during coaching sessions.

3.6.2 Data gathered during coaching

As the purpose of my research was firstly to devise a coaching process which would foster agreement among the members of an executive team as to their preferred organisational culture, a combination of group and individual coaching sessions would be held, with the following outcomes in mind.

3.6.2.1 Group coaching

The group coaching sessions were intended to provide a forum within which the members of the executive team could:

- Get feedback with regard to the perception of their fellow team members as to the culture(s) which currently predominant and preferred;
- Discover how others in the organisation perceived the organisational culture;
- Explore the leadership and management practices underlying these cultures (represented by the questions posed in the questionnaire); and
- Discuss and agree on what sort of culture or combination of cultures was appropriate, so as to facilitate an informed choice with regard to those leadership and management practices which would foster such culture *versus* those which would not.

The aim was to end off with a team goal plan which would state which management and leadership practices would receive attention, to provide focus to the individual coaching sessions. For example, it may have appeared that support culture seemed to be preferred, and one of the leadership practices which seemed to be lacking (when comparing current to preferred practices) was recognition to staff for a job well done. The team would then agree to explore ways through which this could be achieved, and the group coach session would end with an agreement to explore how each of the members of the team could achieve this within their business area with their own staff. The individual coaching sessions would then follow, providing an opportunity for each member of the executive team to explore to their resourcefulness, willingness and ability to recognise the efforts of their staff members.

Realistically, the executive team could meet only once a month for half a day to allow for the exploration of a preferred culture to which all could agree. This was to be followed up by one or two coaching sessions per person during the rest of the month to explore each individual's readiness to display those leadership practices which were agreed upon during the team coaching session. In total, six cycles of group coaching followed by individual coaching

sessions were planned, which is why I decided that each cycle would represent a milestone. With this plan all stakeholders were satisfied that the various milestones set for this research process would be achieved on time.

Two roles would be played during each coaching session, the role of facilitator and the role of group coach. By playing the facilitator role, I would ensure that sufficient progress was made towards a goal for each group session pre-determined by the group. The more important role I would play was that of team coach, with which I intended to create an environment stimulating free and honest communication between and among executive team members.

The outcomes of group coaching sessions would be logged and reflected upon with a view to ensure that a coaching style was maintained, and that every member of the team was actively involved in, and in agreement with, any particular decisions having been made. In particular, I would use the information collated as suggested above to reflect upon my own objectivity, coaching approach, and ethical conduct. It would also guide my decisions as to the next suitable step in the evolving process aimed at reaching agreement with regard to preferred organisational culture.

The outcomes of and reflections upon group coaching sessions would be used as the means through which the indicators (behaviours, sentiments, practices and beliefs) indicative of a specific culture would be probed/confirmed. Behaviours constituting both the existing and preferred cultures would be relevant, and probing and/or confirming these would assist in reaching one of the main aims of this research project.

3.6.2.2 Individual coaching sessions

Transcripts of each and every individual coaching session would be analysed and reflected upon with a view to finding confirmation of the individual's perception of the management and leadership practices which sustained the prevailing culture, *versus* those which would foster the preferred culture.

Transcripts of and reflections upon individual coaching sessions would be used to gain insight into the appropriateness of the various steps in the coaching process, with a view to exploring its supportiveness of progress towards agreement on the preferred culture of Epsilon.

Transcripts of and reflections upon the individual coaching sessions would continuously provide the coach (me) with feedback upon the success of my coaching style and approach in my efforts to help each member of the executive team establish the meaning of their personal values, as well as how these related to values displayed by the group.

3.6.3 Information logged in the researcher's diary

My research diary would constitute learning points and reflections upon significant events throughout the research. Its main value would be for me to reflect upon each intervention (notes made during interventions), but also to later reflect upon my reflection-in-action. I hoped to be guided by this diary specifically with regard to reminding myself of the role that I should be playing, the ethical standards I had set for myself, and ensuring that I remained, as far as possible, true to my own coaching framework, values and ethical standards. Furthermore, these reflections should guide me in choosing the focus, direction and aim of the next intervention.

The reflections of those I coached would be treated with the utmost sensitivity and confidentiality, mainly to determine the "accuracy" of my own reflections. Their experiences with regard to process, style and progress would be explored. I also hoped that each participant's diary or feedback would reveal the writer's perspective on events and the feelings they had in relation to them. It was thought that this should also generate insights into the coaching process itself.

3.7 *Triangulation and concurrent validity through data collection methodology*

Since research methods act as funnels through which the observer selectively experiences the environment, a biased or even distorted perspective of reality may result. I therefore consciously decided to use three methods of data collection, to ensure I explored the richness and complexity of the behaviour of the groups with which I would be working, for purposes of drawing valid conclusions. The reason for my decision was twofold: Firstly, English was the second language of both me (the researcher) and my Swedish-speaking clients. Secondly, our cultures were very different. My choice of approaches would allow me to study their behaviour from different "angles", and to use both quantitative data (from the questionnaire) and qualitative data (from coaching sessions and research diaries).

Furthermore, the research diaries would be kept by me and my clients, so as to compare notes on perceptions, feelings, etc., after every coaching session and at the beginning of the following session.

Two definite benefits could be derived from this approach:

- I would not be method-bound, since I would be able to validate my findings regarding my clients from alternative standpoints.

- The use of contrasting methods should, according to Cohen, Manion and Morrison (2000: 112), also considerably reduce any consistent findings attributable to similarities of method.

For more detail, please read the complete research portfolio developed for this project (Appendix F).

3.8 Conclusion

The phenomenological method of investigation would be applied to all analyses of experience. In planning for my data analysis to be informed by this method, I realised that I would have to consistently focus on being phenomenological in order to keep to the three fundamental rules of Phenomenological research as explained by Spinelli (1989: 17-19):

- I will attempt to be completely open to my experiences as coach in order to ensure that any subsequent interpretations if it may prove to be more adequate, thereby keeping to the rule of epoche.
- I will describe, rather than attempt to explain, data which are generated through my process of inquiry. In so doing I will keep to the rule of description.
- I will as far as possible avoid attaching personal significance to that which is discussed or place any initial hierarchies of importance upon what is discussed. In so doing I shall attempt to keep to the rule of equalisation.

So with milestones on paper, a cultural survey in my briefcase, coaching skills at hand, and goodwill in my heart, I felt geared to discover what it takes for a group of individuals, each with their own mindsets, values, perceptions, needs, fears and expectations to agree on the type of behaviours they should display to reach their vision of a common organisational culture.

Chapter 4 provides a complete report on which activities were undertaken from the start to the end of my research project, while Chapter 5 discusses the research findings. Chapter 6 draws meaningful conclusions and recommendations with regard to the coaching process which I hoped would bring about agreement between members of an executive team with regard to the preferred culture of their organisation.

Chapter 4

The Research Process

4.1 Introduction

This chapter recalls my experience in doing the research project outlined in Chapters 1, 2 and 3, focusing on the steps involved in the research process. Key to the reader's understanding of the process, are those activities from inception to completion; some were planned and others evolved into key learning. Chapter 5 informs the reader about the content which constituted agreement with regard to preferred culture, whereas this chapter focuses on the process in reaching agreement.

4.2 My approach to direction and focus in the research process

At this point I thought it might be useful to remind the reader of the project management approach I used to plan the research process from the outset. The purpose of this approach was to speak the "language" of the client who deals mostly with projects, and to provide direction for myself to manage progress with the help of a Gantt chart indicating the various milestones having been set.

The best way to structure this chapter is to deal chronologically with the milestones as they occurred, and to relate them to the objectives (listed in Chapter 2) which were informed by the activities which took place during each of the milestones. The complete milestone plan, listing planned activities within each milestone, can be seen in the original Gantt chart in Appendix H.

Chapter 5 focuses on the results from both individual and group coaching processes. Chapter 6 addresses the achievement of the two main aims of this research process, one of which is informed by the findings of Chapter 4. More specifically I am referring to the second aim of this study, which is to identify the steps necessary for agreement to be reached among the members of an executive team with regard to their preferred organisational culture.

4.3 The process informing definition of objectives of the research process

4.3.1 Milestone 1: Reaching agreement on the research process to be conducted

An interview was held with the Managing Director (MD) of the prospective client organisation, to firstly determine his needs and expectations regarding a possible intervention in his organisation intended to (as he put it) “align the various business units in the organisation”. The second aim of the interview was to determine the readiness of the MD and his organisation to embark on a journey to define the culture which would facilitate unity among the six business units which formed part of the client organisation.

After seeking clarity from the MD on his definition of “alignment”, it was clear that he expected customer-oriented and project-focused behaviour. Once it was established that he would consider coaching as an intervention, although not comfortable “dealing with soft issues himself”, I provided him with an overview of the four cultures described by Harrison and Stokes (1992), and introduced the latter’s organisational survey to him, as described in Section 3.5.2. (Refer to the interview with the MD of the client organisation on clarity regarding the process of cultural alignment through coaching, in Appendix G.)

We then discussed a tentative process flow diagram which showed a possible route toward the implementation of a coaching intervention, to which the MD gave his approval. It was agreed that this process would evolve (a phenomenological approach), forming a sequence of steps necessary to achieve the main aims of the research project, which could inform Objective 2. The proviso was that I would have only six months within which to complete my research project, at an agreed fixed rate per month.

It should be noted that I had some reservations at this point with regard to coaching the MD of this organisation, since he acknowledged that his English was limited. I realised that our coaching relationship could therefore be difficult, and our conversations might not render the best results possible. I nevertheless decided that it was still worth the effort. The MD suggested that his second-in-command (2IC) sit in on my coaching sessions with the MD, so as to help with translation when necessary. I declined, knowing that it was of the utmost importance that I coach him on his own, due to the strong influence I sensed that his 2IC had on him. We agreed to try the coaching on our own first, and to see whether we could do without assistance with translation from others.

Using these outcomes of the interview, I drew up an agreement with the potential to get the MD and the six business unit managers to use coaching as a vehicle. It was presented to the

core executive team of the prospective client organisation (a group of three, including the MD), scrutinised, agreed and signed. This agreement is included in Appendix B.

A Gantt chart was drawn up to show my tentative planning of milestones (a common project management tool used to ensure timely completion). The accomplishment of obtaining a signed agreement from my client, which signified the official start of my research project, was indicated by Milestone 1 on the Gantt chart (see Appendix H).

This meeting adjourned with a commitment to have a “sensitising” session for the complete executive team the following week, with the aim of stimulating their thought processes around “the issues of concern regarding current business and stakeholder satisfaction”. The objective of this session was to probe the need for consistency in perceptions of and behaviour towards customers. This in turn might lead to a realisation of the need for a common organisational culture among the various business units. This aim was achieved, as was the common realisation of the need to decide upon an organisation-wide business strategy.



Not knowing all the members of the executive team, I did not have a sense of “what they knew about aligning businesses or how they felt about it” My style turned out to be facilitative, with a strong educational undercurrent. My approach was informed by understanding of their expressed need to be able to analyse and decide strategic direction for all the respective business units and the company as a whole. My educational role was to facilitate both understanding of and agreement to the need for alignment among the various members of the executive team; this concerned the way in which business should be conducted and how customers should be served. The key message was my underlying belief that strategy is the “what we do”, while culture represents the “how we do it”.

The outcome of the “sensitising” session was agreement with regard to the following actions necessary to enhance their business conduct and business results:

- The various business areas were not aligned in terms of “how they delivered their services to their customers”. They needed to align themselves faster in order to offer customers what they wanted.
- To explore those individual and company values which would facilitate alignment in the way in which business is done and values are represented.
- The vision of Epsilon was not known nor understood by all, since it was neither practical enough nor well communicated.

- To capture new markets and serve current and future clients well, a revised strategy was needed, with a new vision. It had to be something that everyone in the company could buy into.
- The process for Epsilon was to have a strategy intervention which would constitute Milestone 2. From there, the existing and preferred cultures could be defined.

(Refer to the presentation used during the above-mentioned session with regard to culture, complete with feedback from team members on selected slides, in Appendix I.)

Although some executive team members were reluctant to be coached in English, they were open to using a coaching approach to seek agreement among all members of an executive team regarding the preferred culture in the organisation. This informed Objective 1 (To investigate the use of coaching to facilitate agreement, among all members of an executive team, regarding the preferred culture in the organisation) to a large extent since the use of coaching to carry out the investigation needed consent from the whole executive team.

4.3.2 Milestone 2: Developing an organisational strategy

After the “sensitising session”, I realised I would have to put my planned research project on hold to make time for the client organisation to determine their strategic plan, whereafter which we would resume the cultural alignment process. The reasoning behind this decision was twofold:

- The need for a new vision and strategy was uppermost in the minds of my clients, and therefore an urgent business need.
- The existence of a strategy in which all stakeholders believed was a pre-requisite to deciding the best possible culture as a vehicle through which the planned strategy could be attained as explained earlier in this chapter.

Process-wise the reality we were faced with was an extension of the time required for my involvement with the organisation. For the purpose of keeping my research process as “uncontaminated” as possible, ***I made a conscious decision to put the research project on hold in order to facilitate their reaching consensus with regard to their vision and strategy.*** For this reason no further mention will be made of the strategic intervention, other than the fact that it constituted Milestone 2 on the Gantt chart and that the team use the Balanced Scorecard (BSC) way to agree the core strategic drivers and measurements of the organisation.

4.3.3 Milestone 3: Sharing perceptions regarding current and preferred organisational cultures

Milestone 3 was defined as “To gain insight into the perceptions of both the existing and preferred cultures of the organisation, as perceived by the executive team and staff members on lower levels of the organisation”.

This phase of the research project saw the application of the chosen Organisational Culture Questionnaire, designed by Harrison and Stokes (1992), introduced in Chapter 3. The intent was to stimulate thinking regarding the issue of culture and what it constitutes. The strength of this particular cultural tool is to make culture more practical, by equating it to behavioural indicators. The questions posed in the questionnaire were instrumental in initiating both team and individual reflections upon leadership behaviours, which offered a workable starting point for meaningful coaching conversations; the results will be discussed in Chapter 5. The rest of this chapter represents the evolution of a process resulting in the whole executive team agreeing which combination of cultures they preferred to have in the organisation, as this marked the attainment of my overall goal for the research project.

The procedure started with training the executive team in how to use the Organisational Cultural Questionnaire chosen for this project; it ended with them having gained insight into their own and other members’ scores of this tool.

4.3.3.1 Application and scoring of the organisational culture survey

The following steps occurred during Milestone 3:

- Application and scoring of the organisational culture survey on the Executive team.
- Application and scoring of the organisational culture survey on a representative group of people in the client organisation.

In both of the above steps, the chosen cultural survey was applied and scored by team members, after which the results were displayed on a board for all to see. The main issues which constituted agreement were highlighted, as well as those areas where disagreement was apparent. The session was adjourned with members being informed of the survey results, with time to contemplate by themselves what this meant.

The focus was mainly on the survey results of the executive team. The organisational culture survey completed with the members of a representative group of employees was to find out whether the rest of the organisation’s thinking was the same or different regarding both current and preferred organisational culture.

For the purpose of objective interpretation three documents were created to indicate the results of the survey used by the executive team of the organisation, the content of which will be discussed in Chapter 5:

- A distribution chart per type of culture, highlighting the scores on all four cultural indexes.
- A combined cultural index which represents all of the above in one chart.
- A group chart which represents (in bars) the cultural scores of the complete executive team.

4.3.3.2 Comparing the survey results of the executive team and the representative group

Having had to provide feedback with regard to the survey results, this step ended with both teams having gained better insight into their own scores *versus* the scores of the other team (where both current and preferred organisational cultures were concerned). Both teams were also much more aware of each other's perceptions about the organisation's culture.

4.3.3.3 Establishing the main issues of agreement

This phase of the project ended with a conclusion by the members of the executive team that they were in agreement that their current culture is characterised by a combined control- and role-oriented culture, and that they would prefer a combined achievement- and support-oriented culture to be present in the organisation in the future. This realisation informed Objective 3 of this research project, which was to investigate, through coaching, those indicators which reflected both the existing and preferred cultures of the organisation.

4.3.4 Milestone 4: Determining variances between current and preferred cultures

Reaching agreement with regard to the preferred culture of the organisation links directly to Objective 3 of this research project which is "To investigate through coaching those indicators which reflect the preferred culture in the organisation". Achieving this objective involved the following steps:

- Step 1: Identify the most significant variances between the current and preferred organisational cultures of the client organisation.
- Step 2: Agree on the critical leadership practices which constitute the preferred culture of the client organisation.

Having reached clarity concerning perceptions of the organisational culture, together with the coach, the executive team drew an Excel matrix. This highlighted areas where significant variances existed between the current and preferred cultures of the organisation.

Through team coaching, an agreement was reached to develop 12 leadership/management practices which were considered feasible to facilitate organisational culture to move from being control and role-oriented to being achievement and support-oriented.

The executive team then unanimously decided to focus on three issues per month (there were four months left until the end of the project and 12 issues were to be addressed). It was also decided that team coaching should be followed by individual coaching sessions to agree on how the leadership/management indicators which required change should be addressed. This was to be followed by a focus on how every individual team member perceived their personal need and willingness to modify their behaviour towards the agreed outcome.

During team coaching, the variances highlighted in Step 1 were probed, first in a team coaching setting and then again during one-on-one coaching sessions; the results are discussed under Milestone 4, Step 2 of Chapter 5.

4.3.5 Milestone 5: Coaching regarding issues agreed as being priorities

Milestone 5 involved steps in the process which facilitated insight into team and individual perceptions of behavioural indicators which constituted the agreed preferred culture as it related to Objective 5 of this research project which sets out to “define a list of personal and team indicators/behaviours that would reflect the preferred culture within the organisation”.

This phase of the project was launched with all stakeholders having reached agreement sooner than expected on the combination of organisational cultures they preferred. A key factor was the executive team’s informed consent to work on the 12 key leadership challenges. More specifically, they wanted guidance on what to do to provide the type of leadership which would constitute the preferred organisational culture. In essence, they expected me to help them to determine both team and individual goals which would guide their actions towards the preferred leadership behaviours characterising the organisational culture they wanted to nurture. To be instrumental in this as coach, I would have to bridge the gap between knowing which culture they wanted and setting goals for the required behaviours, by exploring the relevant behaviours/beliefs and constructs which underlay the 12 key leadership challenges. This would establish another level of agreement: those indicators (feelings, thoughts and behaviours) which constituted preferred leadership practice.

The same questions which the organisational questionnaire addressed to probe the preferred organisational culture were used to probe, during one-on-one coaching sessions with each team member, their perceptions of how the organisation and themselves could foster those leadership practices which would represent the agreed, preferred culture.

To achieve the above within the four months remaining for this project, the executive team agreed on a coaching cycle consisting of four cycles each of one day of team coaching followed by individual coaching sessions with every member of the executive team.

The first cycle of team coaching followed by individual coaching started with one of the team members inquiring about the “code of conduct” which had been made explicit in one of the training sessions as a prerequisite for harmoniously working teams. After some discussion, it was decided that the team should draft such a document to facilitate teamwork. It was also decided that every team meeting should start with this code of conduct for to create a supportive working environment within which results could be achieved. Thus the code settled on already represented behaviours from mainly a supportive and achievement-oriented culture (the preferred combination of cultures for Epsilon’s future). This meant that throughout the team coaching day, the team’s awareness of those behaviours which constituted the preferred culture was focused on and reinforced.

The MD suggested that smaller teams, who felt equipped and interested, should volunteer to steer an issue, and in this way smaller groups could learn to work together. This would address one of the organisation’s biggest challenges – teamwork. The suggestion was accepted by all. An important condition of this process was that every one of the 12 issues should be facilitated in a different small team so as to avoid the issue of forming cliques which was a feature of the current organisational culture. Also, progress with regard to every issue addressed by a self-chosen group would be presented at each team coaching session. In this way, the rest of the members could provide input, clarify their concerns and so be involved in all the issues at hand. The practicality of this was that faster progress was made than would have been the case had all members taken part in every discussion. Members started to work across borders, and because of their being geographically spread over two provinces, they learned to make use of a variety of communication channels of which teleconferencing and face-to-face meetings were the most popular. To use our available project time to the fullest, priorities were attached to the 12 issues; after the first three priorities were brainstormed on the first team coaching day, challenges 4-6 would be discussed during the second coaching cycle, challenges 7-9 were reserved for the third cycle, and 10-12 for the last.

Our planning proved too ambitious, since some issues took longer to address than others, and we ultimately dealt with 11 of the 12 issues (of which the 11th received minor attention and “commitment”).

The way we went about our team coaching days were as follows:

- The code of conduct was revisited to ensure that behaviours focused on practising achievement- and support-oriented behaviours towards other team members.

- The three issues allocated to this particular team coaching session were put forward, and members of the team could volunteer to take part in discussions regarding one of the issues. Because the team had limited members, and because of their involvement in many of the key issues simultaneously, ample cross-pollination occurred as members were co-opted to work on more than one team. The leadership of each small team was kept constant to ensure focus, responsibility and progress.
- Each small team brainstormed the shortcomings of the leadership issue at hand in terms of the current culture, and established “desirable leadership and management behaviours” which they thought were essential to facilitate moving to the preferred culture.
- Each team presented their findings in an attempt to obtain the rest of the group’s input. This guided the small team to agree to research the matter further (outside the group) and report back on their progress at the next team meeting.

Individual coaching sessions, which followed every team coaching session, offered individual team members the necessary support to explore their own needs resourcefulness to reconsider their own behaviour towards the preferred organisational culture. Coaching sessions were tape-recorded and transcribed for record-keeping and personal reflection.

As the first cycle of coaching came to an end, I realised that the individual team members were not keen to reflect in their diaries on their coaching sessions, nor did they think it appropriate to email me with their thoughts afterwards. Upon consulting with my Swedish partner, I understood why. According to him the value of privacy and respect was so strongly reinforced in Swedish society, that people rarely found it appropriate or comfortable to share their deepest, innermost thoughts (particularly on issues such as values). I found instead that they were willing to be open in a coaching setting where they were with someone whom they trusted implicitly.

Being concerned to achieve triangulation (see Chapter 3), I substituted questions at the end of each individual coaching session for the coaching diaries. These questions were directed at finding out their perceptions of:

- The usefulness of each session;
- The coach’s style and approach;
- The complete research process and its potential to ensure closer cooperation among team members;
- Any ideas, concerns or needs they may have had about progress;
- What they wanted to discuss at the next coaching session; and

- Any actions (observations, reflections and conversations) we agreed should happen prior to our next coaching session.



It was apparent that with each complete coaching cycle (team followed by individual coaching) the team became more aware of the leadership and management behaviours likely to foster their preferred organisational culture. It was also reassuring to recognise meaningful shifts in the perceptions of individual team members of their own responsibility and resourcefulness to foster the agreed preferred culture of achievement and support. In essence, this phase of the research process contributed towards reaching Objective 5, which was to define a list of personal and team indicators/behaviours that would reflect the preferred culture within the organisation. The results are detailed in Chapter 5.

4.3.6 Milestone 6: Setting goals to facilitate the agreed preferred culture

Milestone 6 comprised steps in the process leading to the setting of team and individual goals aimed at developing behaviours to foster the agreed preferred culture and communicating the content of Objective 6.

In the fourth and last coaching cycle, which culminated in Milestone 6, it was agreed that this stage of coaching should have as its end result, a team plan and a plan for each individual leader (the managers of the six business units). These plans contain commitments to the leadership and management practices agreed upon to foster growth towards the agreed preferred organisational culture. This phase of the project signifies a synthesis of the personal and team insights, reflections and commitments made throughout the process.

I would have been satisfied with a simple team commitment (similar to a code of conduct) which represented the behaviours which all members were committed to practising in their quest for a more supportive and achievement-oriented culture. I was delighted when I discovered that they planned to link their cultural goals to their strategic goals on the same Balanced Scorecard: one for the team (representing the company's plan) and one for individual members of the executive team (representing the six business units). This effectively meant that they had mentally integrated both "what needs doing" (the strategy) and "how things need to be done" (the preferred culture), into one document, which would be communicated to all stakeholders in the organisation. The openness with which they intended to share what was both viable in a business sense and personally meaningful, gave me hope that their efforts to practise the new behaviours would ensure progress even beyond this research project.

The end of this phase of the project also saw the successful reaching of the sixth and last objective: to define a set of personal goals and a set of team goals aimed at the implementation of leadership practices that would facilitate positive growth towards the development of the team's preferred culture.

4.4 Conclusion

This research project was completed with one final team coaching day during which the MD and every member of the executive team presented the scorecards for which they were to be held accountable, complete with strategic and cultural goals. We agreed to have a follow-up session one year later to measure the then current culture, to assess the team's progress towards their preferred organisational culture. Unfortunately, this did not happen for two reasons. Firstly, I was then resident in South Africa rather than Sweden, and secondly the executive team were involved in a very big quote for potential business which would keep them busy for the next three years.

With delight I noted that the goals on these Balanced Scorecards, one year later, still represented both strategic goals (the "what" to do in business) as well as the cultural goals (the "how" they do business). Could it be that they had made a mind-shift with regard to the need to plan for both? Chapter 5 details the results/findings of both the individual and group coaching processes.

The results reported in this chapter also serve to prove the achievement of Objective 2, which aimed to map out the coaching steps developed in the process of facilitating agreement among all members of an executive team, regarding the culture they preferred to have in their organisation.

Chapter 5

Findings: The Results of Meaningful Coaching Conversations

5.1 Introduction

This chapter details the content of the coaching sessions in which agreement was developed regarding the preferred culture within the Epsilon executive team. The focus is on the results from both individual and group coaching processes. For the sake of clarity, the same chapter structure will be used as for Chapter 4.

To put the structure of this chapter into perspective, the milestones originally set to guide the research process can be seen as the backbone of this project; the extent to which the objectives set for this research project have been met are the connecting tendons; and the content of the coaching conversations are the blood vessels carrying much-needed oxygen and energy to the heart of the client – i.e., Epsilon’s executive team.

5.2 Milestone 1: Reaching agreement on the research process to be conducted

The process involved in reaching agreement was discussed in Chapter 4, whereas this chapter will focus on the outcomes/results of first the organisational culture survey, and second the coaching conversations which informed the researcher/coach regarding Objective 1. These set out “to investigate the use of coaching to facilitate agreement, among all members of an executive team, regarding the preferred culture in the organisation”.

“Buy-in” coaching conversations were held with every member of the executive team. Agreement was reached by the core members of the team that this research project would add value to Epsilon, and an agreement was signed between researcher and client (see Section 4.3.1). The purpose of these coaching sessions was:

1. To bring about clarity regarding the process of cultural alignment which the members of the executive team were about to embark upon;
2. To define the resources needed to implement the process successfully; and
3. To gain their commitment and support for the process, which would facilitate start-up.

What follows are the most common responses to questions posed during these “buy-in” coaching sessions, from which the conclusion was drawn that this team was ready and eager to “kick-off” with the proposed research process.

When probed regarding the value and potential of agreement to a preferred culture to their organisation, it was clear that the executive team longed for a culture which would value the strengths of every team member, as well as the staff contingents of the business units they represented. They also wished for a closer relationship with each other, which would reflect more openness and goodwill in terms of furthering the business opportunities not just of theirs, but also the business units of other executive team members. When asked how they would know that a common culture existed among all business units of their organisation, their responses indicated an expectation of stronger teamwork, better communication, less blame behaviour, the sharing of business opportunities, and making more money.

To a question on the personal gain expected once agreement concerning preferred organisational culture had been reached, the most common response indicated a need for personal development through better insight into their own behaviour when managing/leading others. The question, "what benefits do you see for the organisation through participating in this process?" revealed: a strong need for the current culture of small-group alliances to be replaced by teamwork, alignment in terms of the direction the business should follow, better recognition of each other's efforts, and a stronger commitment to each other and the overall goals of the organisation.

Their expectation of coaching as the vehicle to be used to reach agreement (with regard to preferred organisational culture) rendered an overwhelmingly positive response, and gave me hope for the learning journey on which we were all about to embark. Their perceptions included the following:

- "It would give me the opportunity to voice what is in my mind and I will sort out my own mind about things."
- "I think it is better than training because people can be more open."
- "It is good, since I need more education and it is nice to talk with people who have an objective outside view."
- "I have been coached before and find it very good. It is nice to know that you can always phone somebody, especially when managing people and needing advice."

Upon querying their readiness to be coached by me they all reported themselves comfortable with this.

The crucial questions about confidentiality and ethics revealed that most did not want their responses to be made known to anyone outside of the coaching relationship. They understood that I needed to draw overall conclusions after each round of one-on-one coaching sessions, to provide momentum to the process and focus to the group coaching sessions, and to this

they gave permission. Nobody felt it necessary to go into a written agreement with me as coach with regard to confidentiality, since the organisation had done so already, and its agreement contained a satisfactory clause on the issue of confidentiality. For the above reason, transcripts of tape-recordings made of individual coaching sessions can unfortunately not be included as attachments, but only the coach's summary and reflections upon these. (Refer to the summary of buy-in coaching sessions in Appendix J.)

Significant feedback resulting from the "buy-in coaching sessions" was that Epsilon had no proper strategy in place. This was felt to be a problem which had to be dealt with immediately. Their shared concern was that it was logical to decide their organisation's preferred culture only once clarity existed around "what it is that the organisation wanted to achieve" (the strategy being the "what to do" and the culture being "how to do it"). This meant that, for the executive team to take intelligent and informed decisions about the type of culture they needed to facilitate successful business results, a business strategy had first to be developed. We realised that for the sake of keeping the results of this proposed research project "uncontaminated", the process of cultural alignment had to be postponed until the client organisation had a strategy in place.

5.3 Milestone 2: Developing an organisational strategy

The activities undertaken during this phase of the project saw the successful development of a company strategy, complete with vision/mission statement, business unit strategies and, very importantly, a code of conduct. Because the establishment of a company strategy is not part of the proposed research process, its outcomes will not be mentioned here apart from the fact that the balanced scorecard method of presenting strategy was used. For more information, a presentation of this tool is included in Appendix K.

At the outset of the strategic planning process a code of conduct was decided among the executive team members to guide them behaviourally during this process. This code supported the facilitator of the strategic planning process to maintain focus and generate constructive contributions from team members, who at this stage were still very individualistic, did not know quite how much openness was safe, and had the business success of their own business units uppermost in their minds. The code of conduct agreed upon was highlighted at the outset of each group session after its inception, and focused on behaviours such as communication, meeting management, and taking responsibility for commitments made. This was the first time that they had made a commitment to each other in terms of behavioural conduct, and it was thus a significant step in the direction of an agreed preferred culture before it was known what this culture should be like.

5.4 Milestone 3: Sharing perceptions regarding current and preferred organisational cultures

Gathering and comparing perceptions with regard to both current and preferred organisational cultures within the client organisation informed Objective 4. This aimed to gain insight into the perception of the existing and preferred cultures of the organisation, as perceived by the executive team and staff members at lower levels of the organisation.

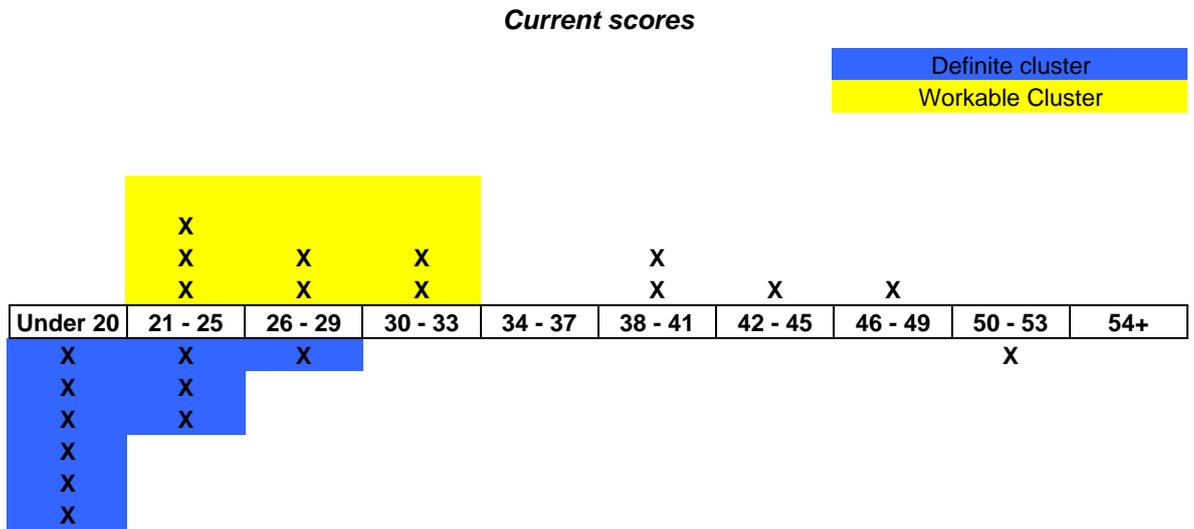
The organisational questionnaire of Harrison and Stokes (1992), introduced in Chapter 3 (3.5.2.2), was completed by two groups, one being the executive team while the second group represented the rest of the organisation. The scored questionnaires rendered the following insights into the current and preferred cultures as perceived by both groups.

5.4.1 Perceptions of preferred *versus* current culture – executive team

The distribution chart per type of culture (four in total) was created to show how every member of the executive team rated each culture:

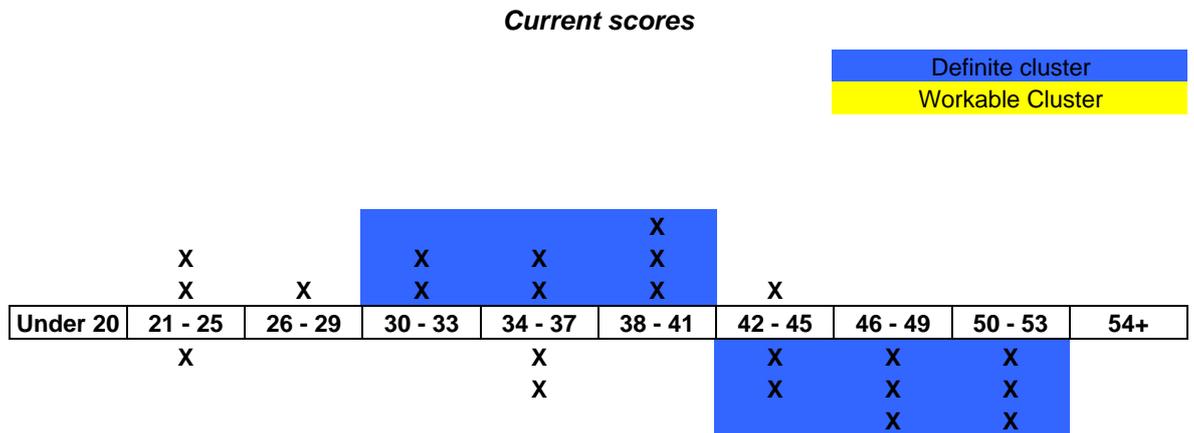
- With regard to the current power culture, 64 per cent of the team scored between 21 and 33 on a scale of 54+, whereas 91 per cent scored the preferred power culture between 0 and 29 (see Figure 7). This indicated a need to move from a power culture which was of average strength to a power culture of lesser strength in the organisation.
- Where the current support culture is concerned, 64 per cent of the team scored between 30 and 41, whereas 73 per cent scored the preferred support culture between 42 and 53, which makes this the second most preferred cultural orientation according to the executive team (Figure 8).

Figure 7 Completed chart: distribution of scores for power culture as perceived by the executive team



Preferred scores

Figure 8 Completed chart: distribution of scores for support culture as seen by the executive team



Preferred scores

- Where the current role culture is concerned, 82 per cent of the team scored between 38 and 49, whereas 73 per cent of the team scored the preferred role culture between 30 and 37 (Figure 9). This indicated that although they saw the need for a significant role-orientation to remain, they wanted it to have somewhat less focus/strength in their future culture.
- With regard to the current achievement culture, 73 per cent of the team scored between 38 and 53, which makes this the strongest perceived current culture in the client organisation as viewed by the executive team (Figure 10). Their preferred achievement culture scores were between 46 and 54 (for 91 per cent of the team), which indicates that they wanted this cultural orientation to feature even more strongly in the future.
- Of great significance were the MD's scores, which reflected significant variances from the rest of the team. He experienced a strong power culture, and saw the need to maintain this. He also experienced a stronger role culture, and would not mind maintaining this in the future. He perceived the achievement-orientation as average, with a need to maintain it in the future. The support culture he saw as fairly low, with no need to increase its strength. In summary, he seemed to be happy to have the current organisational culture maintained.

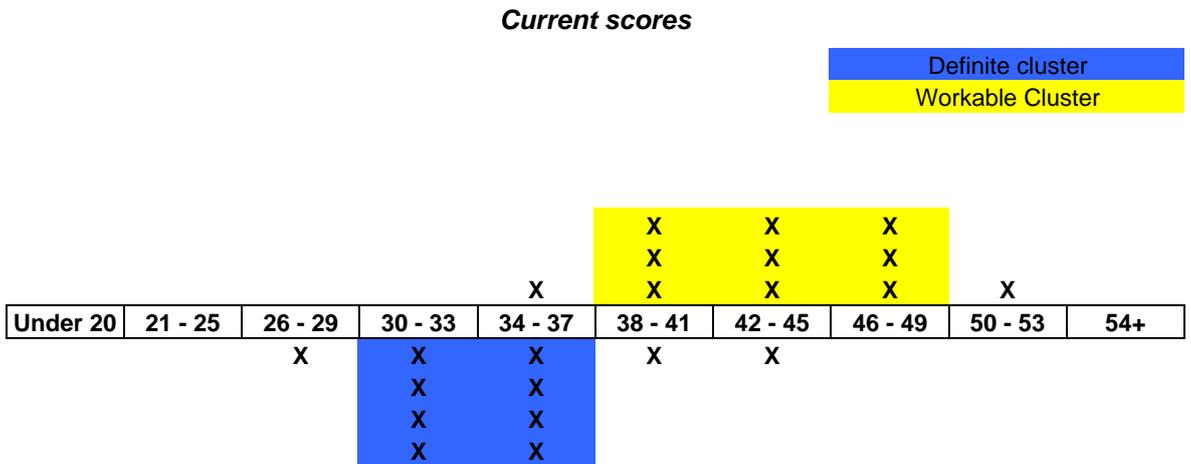
All the above results were combined into a group cultural index displaying the group's perceptions concerning the organisational culture (see Table 1). The executive group chart indicated an average current Power orientation with a need for it to be less strong. The current Role culture is seen as strong with a need to marginalise it in the future. The two significant preferred cultural orientations are unmistakable the Achievement culture, followed by the Support culture. (Refer to the bar chart comparing existing and preferred cultural scores as rated by the executive team in Appendix L).

5.4.2 Perceptions of preferred *versus* current culture – representative group

The distribution chart per type of culture (four in total) was created to show how every member of the representative group rated each culture.

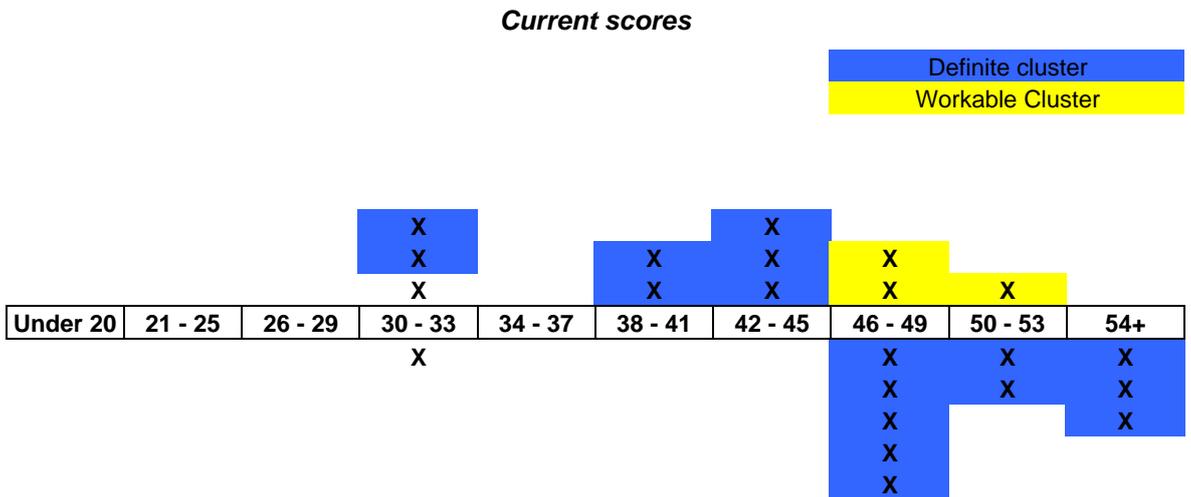
With regard to the current power culture, 60 per cent of the representative group scored between 34 and 45, whereas 80 per cent of the team preferred an insignificant power culture of less than 20 on a scale of 54+ (Figure 11).

Figure 9 Completed chart: distribution of scores for role culture as seen by the executive team



Preferred scores

Figure 10 Completed chart: distribution of scores for achievement culture as seen by the executive team



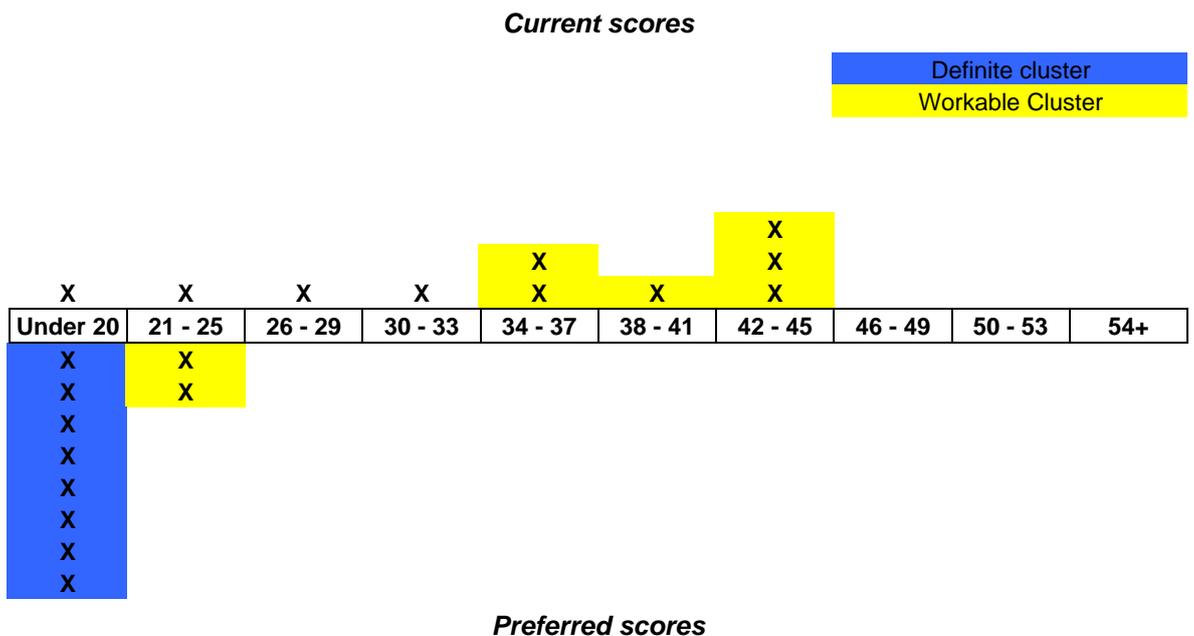
Preferred scores

Table 1 Group cultural index - executive team: existing and preferred cultures

Existing				Preferred			
P	R	A	S	P	R	A	S
38	49	39	24	18	37	59	36
24	46	53	27	17	31	49	53
33	44	42	31	25	34	39	32
30	40	42	38	20	30	52	48
46	47	32	24	51	43	33	23
24	35	48	43	20	32	56	42
25	48	41	36	18	36	60	36
29	40	43	38	23	34	47	46
27	41	46	36	22	30	47	53
39	43	30	39	17	38	47	48
42	45	30	33	26	28	44	52
32	43	41	34	23	34	48	43

Group existing culture index:	Group preferred culture index:
A + S - P - R	A + S - P - R
41 + 34 - 32 - 43 = - 0	48 + 43 - 23 - 34 = 34

Figure 11 Completed chart: distribution of scores for power culture as perceived by representative group

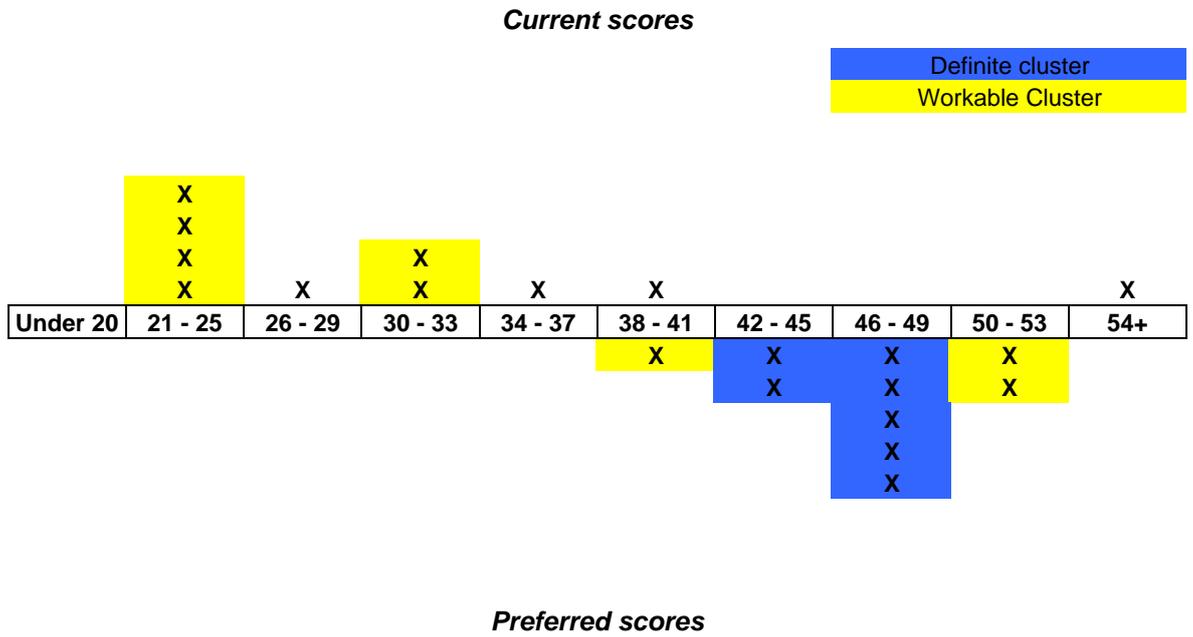


Where the current role culture is concerned, all responses ranged between 26 and 54, with 50 per cent indicating a very strong role orientation (between 46 and 54). With regard to the preferred role culture, 100 per cent opted for an average-to-strong role-orientation of between 30 and 41 (Figure 12).

With regard to the current achievement culture, 60 per cent of the representative team scored between 42 and 49, whereas 100 per cent of the team scored between 42 and 54+ (Figure 13). This means that they would have liked the preferred achievement culture of the company to gain more strength than it currently had.

The current support culture scored fairly low, with 40 per cent of the team scoring between 21 and 25, and another 40 per cent scoring below 33. With reference to the preferred support culture, 100 per cent of the team saw a need for a very strong supportive orientation between 38 and 53 (Figure 14).

Figure 14 Completed chart: distribution of scores for support culture as perceived by representative group



The group cultural index for the representative group puts all the above results together to render a complete view of the responses of all the members of this group. (Refer to the bar chart comparing existing and preferred cultural scores as rated by the representative team in Appendix M.)

It should be remembered that the reason for testing the perceptions of a representative team of volunteers was to either confirm or dispute the results of the questionnaire yielded by the former group. The focus for the subsequent team coaching was to identify the main differences in opinions held by members of the executive team relating to current *versus* preferred culture. This part of the research process signifies the reaching of Objective 5, since it was clear how members on levels lower than that of the executive team perceived the organisation's preferred culture.

5.4.3 A comparison between survey results of the executive team and representative group

This addresses Objective 4, which focused on "gaining insight into the perception of both the existing and preferred cultures of the organisation, as perceived by staff members on lower levels of the organisation".

A comparison between executive team scores and representative group scores yielded the following results.

The current power culture was seen by both groups as of average strength, with a strong need expressed by both groups to diminish its power even more. Their results show remarkable similarity with regard to both the current and preferred role cultures. Both teams saw this orientation as having average to strong influence in the organisation, and wanted to keep it as such. With regard to the achievement culture, the representative group reflected almost the same scores as the executive team, with both realising its current strength and both wanting it to be even stronger. Lastly, concerning the support culture, both groups saw the need for it to grow in strength from average to strong. In summary, the achievement culture was the most desired, followed by the support culture and the role culture, with the power culture being the least preferred. The above results also serve to prove that the views held by the executive team were shared to a high degree by the group representing the rest of the organisation.

The next step was to probe the relevance and viability of the above results with the complete executive team to gain better insight into their personal perceptions of their organisational culture. A summary of perceptions gathered through meaningful coaching conversations is revealed in the following section.

5.4.4 Establish the main issues of agreement on a preferred organisational culture

In regard to the question as to what the significant differences were in the way the organisation's culture was perceived, the most significant finding was the extent to which the MD's view of both existing and preferred cultures differed from the rest of the group. My immediate reflection was that perhaps he misinterpreted the instructions of the organisational culture questionnaire which kick-started the coaching process around current versus preferred cultures? Results showed that he had completed the two sets of questions in almost exact fashion, meaning that he saw it appropriate to continue with the current combined control and role oriented culture into the future, whereas the rest of the team members all preferred to move away from this orientation to a more performance driven and supportive organisational culture. When probed about this during a coaching session his response was that "perhaps his results would have been different, had the questionnaire been in Swedish".

When asked to air their views of the causes of varying perceptions with regard to organisational culture, they thought that differences in team member's roles and responsibilities resulted from varying backgrounds and differences in expectations.

When asked "Which of the similarities between existing and preferred scores were significant?" most members of the executive team reported satisfaction with the significant similarities in how the strength of the cultures scored. This was seen as a decisive factor in reaching agreement with regard to the culture or combination of cultures which would be most preferred by the members of this executive team.

A question which probed their perceptions regarding the strengths of the current combination of cultures revealed that the high current achievement-orientation was seen to be positive in view of the project-driven nature of the organisation, which operated in a tough market where profit margins were negotiated to a minimum.

The converse question focusing on the disadvantages of the current combination of cultures in the organisation produced the following responses:

- "We may be too role-oriented to allow for growth in achievement culture, which means that we may be so caught up in our designated roles and job descriptions, that we would hesitate to, or allow others to, test the boundaries or even break them."
- "There seems to be too little support for each other and our staff in this organisation."
- "The leader's view is very different from the rest of his team."
- "Too much power is held by the MD and his core executive team".

When asked which cultural influence should be reduced in the future, the response was that a need existed for clarification of roles and responsibilities; but that in general role-orientation was too strong at present and needed to be played down. An overwhelming number of team members wanted this orientation to be non-existent in the organisation.

Upon inquiring about the barriers that could hinder the client organisation from moving from its current reality to where they would like it to be in terms of organisational culture the main concerns were the MD being in favour of the power culture; the possibility that members of the organisation may feel unsafe with less procedures, rules and guidelines (a diminishing role culture); that a safety net may have to be created in the form of strengthened competence on all levels, so as to empower people more and, in so doing, allow for mistakes (a characteristic of an achievement culture); and a need to decide what exactly needs changing when it comes to leadership behaviours/indicators.

The second to last question related to the perceived potential of the movement towards a preferred culture to integrate the different business units of the organisation. Responses were positive in this regard, reflecting the need to marry the needs of the overall business with the needs of the various business units in order to achieve this. Strength was seen in the fact that views were very similar already and that they all desired it enough to make it happen. They thought that if nothing changed except their increased understanding of each other, the process would be worthwhile.

The last question was raised: "What would be different in your organisation if the existing combination of cultures were to shift towards the preferred combination of cultures, with all in agreement/alignment?" Most respondents claimed better cooperation, more open relationships, better communication and increased business activity across business unit borders in order to strengthen the team. It was also felt that the organisation would have better direction, a better working atmosphere, would attract more customers over the longer term, and would be a preferred company to work for.

The contributions above indicated a very strong desire to agree to a preferred culture which would be viable, business-wise (possible to achieve without adding to their capacity), bringing personal meaning into their working lives.

5.4.5 The phenomenological analysis process

The definition of phenomenology provided by English and English (1958: 387) was used as benchmark for this study: "In its broadest meaning, phenomenology is a theoretical point of view that advocates the study of **direct experience taken at face value**; and one which sees

behaviours as determined by the phenomena of experience rather than by external, objective and physically described reality”. This particular definition suited the focus of my research topic, which used coaching as a vehicle to explore my clients’ experience of behaviours and situations. Their own perceptions were the key, rather than my interpretation of what they were experiencing. Their experience, individually and collectively, of leadership practices which were reflective of both the current and preferred culture were explored through team and individual coaching and accepted as their truth formed by their own perceptions/values/constructs and the like. Both team and one-on-one coaching sessions were conducted in a phenomenological way, and in so doing “their direct experience taken at face value” was discovered during coaching sessions. Secondly, leadership behaviour (of individual team members as well as the group) resulting from their personal experiences were discovered, logged and reflected upon. As coach I realised upfront that the practising of this approach would require of me to check myself continuously so as not to influence, direct, affect or steer any coaching discussion in any particular way and especially not to attach my own meaning to their experiences of both their current and preferred leadership practice. I believe that I achieved this in most cases, but realised that there would always be scope for my personal development in this arena.

When rereading the questions used and answers obtained in this coaching session, my personal evaluation of what transpired was that some of the meaning that the current and preferred cultural indicators held for him personally was captured.

His own perceptions regarding the increased meaningfulness of an adapted style of leadership was shared by him, and in so doing his experience of himself as leader, as well as his experience of himself as part and parcel of his team, was the essence of discovery for both himself and me as his coach.

The role I played during this coaching session was to create a safe space within which he could explore the meaning he attaches to/perceptions he held regarding being in control and having a strong sense of role-orientation as leader of his team and his company. Furthermore, it was necessary to explore the possibility of him finding more meaning in practising more of the leadership behaviours which would strengthen the supportive orientation for which the rest of his team was asking.

His conscious experience of some of the leadership practices which would facilitate the preferred culture, in particular more information sharing and inclusion of all team members in key decisions, was stimulated during this session in an effort to provide him with the opportunity to decide for himself to what extent he felt willing and able to practice these two leadership practices more often.

Throughout the coaching session, I refrained from providing judgment, opinions or specific guidance, even when asked to do so, because the main aim was to allow him to experience his own thoughts, view and meaningfulness or lack thereof where both current and preferred cultures were concerned.

In light of the above conclusions reached through critical reflection, I have come to the conclusion that I have been phenomenological in my approach to this coaching session. See Appendix S for how the phenomenological process worked in a coaching session with the MD to probe his perceptions regarding the results of the Organisational Culture survey which he and his team had completed.

5.5 Milestone 4: Determining variances between current and preferred cultures

Reaching agreement with regard to the preferred culture of the organisation, informs Objective 3 of this research project, which is to investigate through coaching those indicators which reflect existing and preferred cultures of the organisation.

5.5.1 Identify the most significant variances between the current and preferred organisational cultures of the client organisation

Having reached clarity on their perceptions of the organisational culture, together with the coach, the executive team drew an Excel matrix which highlighted those areas where significant variances exist between the current and preferred cultures of the organisation and the questionnaire. This matrix detailed the leadership practices seen to need changing (Table 2). The left-hand column presents current leadership practices/behaviours which seem to need changing in order to display the leadership practices/behaviours or the preferred culture, represented by the right-hand column.

Table 2 Significant variances between current and preferred cultures as seen by the executive team	
<i>Current culture</i>	<i>Preferred culture</i>
Staying within the policies and procedures relating to jobs.	Meeting the challenges of the task, finding better ways of doing things.
Treating individuals like numbers.	Treating team members as peers, mutually committed to achieving a common purpose.
Directives/orders coming down from higher levels.	More decisions to be made at point of service.
Assignment of jobs according to competence and experience only.	Matching requirements of jobs with interests of individuals plus their need for growth development.
Job motivation coming from staff not wanting to embarrass their superiors.	Stronger focus on self motivation, taking the initiative and challenging leaders.
Managers and leaders being decisive and strong.	Leaders to be more supportive, responsive and caring about the concerns of staff.
Job motivation coming from fear of punishment and following the norm.	Stimulate stronger desires to achieve, create and motivate.
Intervention of leaders into personal conflicts.	Conflict to be discussed with aim of reaching best outcome for all involved.
People are tempted to break rules and hide it.	More open support for re-evaluation of rules.

Refer to the document “Diagnosing culture questions” in Appendix N if you wish to see some of the significant variances in scores and the leadership practices they represent.

This particular study had achieved its main aim at this point, which was “to get the executive team of the client organisation to reach agreement with regard to the preferred organisational culture”. The executive team expressed a need to integrate the leadership indicators into the key areas most needing attention, such as communication, managing information, managing people and more. They wanted to reach agreement on those practices which would constitute the essence of the preferred culture (Milestone 4), after which individual coaching would probe the feasibility of developing these practices in the eyes of every member of this team (Milestone 5).

Step 2: Agree on the critical leadership/practices which constitute the preferred culture

During team coaching the variances between current and preferred leadership practices, as discussed in Step 1 of this section, were scrutinised and prioritised. Originally 16 key areas were identified as potential contributing factors to shift from the current towards the preferred organisational culture; 12 were finally decided upon. Open discussions revealed how team

members perceived these practices to be displayed in the future. A thorough discussion of all these issues is in the next section of this document.

The *modus operandi* agreed to deal with the above 12 issues should be noted. It was unanimously decided to research, in small teams, leadership practices which would reflect and enhance the agreed preferred culture; subsequent one-on-one coaching sessions would probe the feasibility of developing/practising the preferred practices.

The progress outlined above informed Objective 3 of the research project: to investigate through coaching, those indicators which reflected both existing and preferred cultures of the organisation. Milestone 5 achieved the outcomes of the small-team coaching which was aimed at addressing the 12 leadership issues prioritised above. The most significant outcomes of the subsequent individual coaching sessions gave every member of the team the opportunity to determine for himself how willing and resourceful they were to adapt their current leadership behaviours to those which the team agreed would be preferred.

5.6 Milestone 5: Coaching regarding issues agreed as being priorities

Gaining insight into team and individual perceptions of behavioural indicators which constituted the agreed preferred culture informs Objective 5: to define a list of personal and team indicators/behaviours that would reflect the preferred culture within the organisation.

At this stage of the research project, four months remained to complete the project. For this reason the executive team decided to focus on three issues per month of the 12 identified. Four rounds of team coaching were followed by small group discussions; individual coaching followed to make the much-needed progress towards the deadline.

Reporting of results of both team and individual coaching session logically followed this outline. The leadership practices which the team had agreed would foster their preferred culture, as it relates to the issue at hand, were to be presented first, followed by the individual coaching outcomes: these related to the perceptions of team members as to the viability and meaningfulness of the new agreed leadership practices. Some of the issues tabled earlier received more attention than the latter: the team had had time to actively improve these behaviours, whereas reporting with regard to the findings of this research process stopped after the 12th issue had been discussed and achieved. Effectively this means that (over and above the agreement reached on the leadership indicators/practices to foster the agreed preferred culture) an added bonus was offered, in the form of progress having been made with the actual practising of agreed preferred leadership practices on most of the 12 issues.

5.6.1 Round 1: Issues 1-3 addressed during March 2005

5.6.1.1 A comprehensive sales strategy was needed

Team coaching reflections concerning sales strategy, led to a detailed list of key leadership practices which required more focus in the future to allow for a very diverse team of people with varied business interests to work together:

- Strategies should be on paper and not in the minds of those who formulated them.
- Which markets should receive focus in the future?
- Who should be allowed to sell projects?
- Should there be any limitations to the size of projects that could be sold and if so, what should they be?
- Who should handle a project once it is landed?
- What should the territorial boundaries for selling be, if any?
- How should the sharing of profit or loss work?
- Guidelines for marketing and selling efforts should be agreed.
- The sales reporting system called Caesar should be used more optimally by all involved.
- The calendars of team members (all of whom had the responsibility for selling their own business) should be synchronised so that selling efforts could be combined and cross-selling opportunities could be used.
- Sales processes should be defined, and responsibility and authority levels with regard to sales should be clarified.

Most of the above points were accommodated in a comprehensive sales strategy which evolved over the remaining time during which this project ran. (See the sales strategy in Appendix O, unfortunately in Swedish, which specifies activities, deadlines and responsibilities involving all six business units plus their head office.)

The fact that the leader of every business unit (member of the executive team) had committed themselves to actions for selling not only their own business but also to get involved in cross-selling of other business units indicated a very significant shift from the silo effect which characterised the culture as it was perceived prior to this coaching intervention. The main issues addressed in this sales strategy are displayed vertically and they refer to business systems, marketing materials, business analysis and new markets. The horizontal headings refer to strategic goals, initiatives, measurement, due dates, responsible divisions and comments. The colours used indicated which initiatives were under way, which were complete, and which were on hold. With every team coaching session after the establishment of this sales strategy, the latter was updated with most recent progress and goals were set for the next month.

The progress described above reflected a keenness among members of the executive to start working as a team in order to achieve better business results. Information was openly shared in the form of potential business, current involvement with customers and expected returns. This focus on a combined sales strategy saw the strengthening of both the preferred cultures of achievement and support, while an added advantage was that better role clarification emerged.

According to individual coaching feedback the progress made with the common sales strategy was very pleasing, since it was the first constructive sign that people were willing and eager to do business together.

Contributions from other members of the team were as follows:

- “It is good to get to know the other members of the team better, specially the ones we don’t deal with so often.”
- “I have learnt that relationship building is very important and that I need to learn much about project selling.”
- “We all discuss business and everyone’s input is taken into account, this feels good!”
- “I feel good about our progress. Others feel that we should move faster, but I think we would need another round of talks to complete our strategy.”
- “Everyone has ideas on sales and I find it interesting. We are all different in the way that we sell and if we share our ideas it is great.”
- “The focus on new markets marks a stronger focus on achievement. The sales strategy leads to team progress.”
- “The new sales presentation is a challenge and should be an excellent support for the sales guys.”

Concerning attempts to strengthen the achievement culture, the member heading the sales strategy team reported better cooperation between the different business units; sales communications had been standardised; they had curriculum vitae’s of all their consultants which served as a data bank when having to decide which consultant to place with which customer. Having logged some reference projects gave them something to speak about when visiting new customers. All of this led to better chances of achieving results.

When it comes to practising/offering better support to each other, the standardised communication developed should ensure that team members are all aiming in the same direction and that everyone feels included. The fact that they wanted to identify and log special competence areas among all their staff would make them feel involved and recognised, which would be supportive to their customers.

5.6.1.2 Decision-making in the team had to be more transparent and inclusive

During team coaching the following leadership practices were identified as representative of the preferred culture:

- Levels of authority and responsibility for decision-making needed to be clarified, with a focus on empowerment. The key question related to those situations which warrants the core management team to take decisions unilaterally needed answering.
- Leaders had to be more open to members of the team challenging their viewpoints.
- Leaders were to be less decisive and powerful. A higher focus was necessary on democracy and inclusion.
- A guideline was necessary for the management of conflicts.

The main issue upon which consensus was reached had to do with the MD's commitment to share business issues/problems/opportunities as and when they arose with everyone per email, during which time he would invite feedback/ideas. After this he would take a decision together with the core management team, consisting of him and two other senior members of the executive team. Should they find it necessary to make decisions on their own, background information and reasons for decisions taken by any member of this team would be communicated to the rest of the team.

As time progressed more workable guidelines were agreed to guide the team with future decision-making:

- To ensure that the number of issues to be decided upon were manageable.
- To distribute agendas at least 48 hours before meetings reflecting which discussions should take place at the meeting.
- To only involve people who are affected particular decision to be taken.
- To stick to dates set for meetings.
- To keep to the "code of conduct" having been agreed to by all (see Point 9 of this section).

With regard to progress being made regarding decision-making by the team, the following individual coaching perceptions were shared:

- "Yes, we are looking beyond our boxes more, to see what is good for the team and the company and we are developing a common way of thinking, by strategising on the important decisions facing the team."
- "The business judgement issue gives us up-to-date information regarding all sales activities and results. This brings about improved decision-making and leadership."
- "We are more informed than before, but the decision-making could still be better."

- “Shared decision-making has improved somewhat.”

5.6.1.3 Information sharing in the team had to be opened up

Team members reported that they did not get information first-hand and had to hear about developments from others. Other members of the organisation felt ill-informed and isolated from the business. During team coaching the following preferred leadership practices were agreed upon:

- The sharing of learning should receive more attention. A common perception was held that they re-invented the wheel all the time and that success stories (previously successfully completed projects) should be used as references to attain new business.
- Business information should be shared with consultants. Informed consultants could be ambassadors and should be able to establish future sales opportunities, if they were better informed and felt proud of the organisation they belonged to.
- The perception which had been created that project business is the only future business for the organisation, had to be clarified.
- People lower down should be better informed with regard to the strategies and decisions taken at the top.

Outcomes following the implementation of above decisions:

- Teleconferencing was instituted on Monday afternoons for the purposes of sharing opportunities for sales, new projects, etc.
- It was decided that the MD would share business information with the entire executive team, prior to sharing this information with the rest of the staff.
- Care would be taken to send out clear information in a standardised way to all business units.
- Better communication to consultants employed by the client organisation located in remote places was agreed to be a priority to ensure better informed employees.

As to whether members felt that the sharing of concerns and ideas happened more freely, after the need was established to be more open, the responses were:

- “Yes, we tried as a team to have discussions in the past on how to make things better but they never worked.”
- With regard to the level of listening experienced, members reported that they felt more listened to, particularly by the MD.
- As to having more opportunity to voice opinions one member reported that some positive growth were happening in that members were given time to provide input to meeting agendas.

- An example of a hesitant commitment towards better sharing of information: “We share all information openly with all team members now, with the understanding that, if they leak it, we will not share it with them again.”

5.6.1.4 Team coaching process and outcomes, using the phenomenological approach

Through storytelling conversations, fun was had by all team members whilst relating sometimes relevant and sometimes irrelevant anecdotes from their personal lives, leaving the rest of their team with a better idea of what is meaningful to them. Shared stories emerged which reached beyond the here and now to future possibilities, and through this they correlated co-created potential experiences with each other. This for me represented a very phenomenological development in the team. Through reflection upon the meaningfulness of the team coaching session, significant progress was reported from various members of the team. They took the trouble to explain a sense of their experiences of the session, based on their own interpretations thereof and found a number of team coaching outcomes to be collectively meaningful. All in all, the application of phenomenological principles during team coaching sessions seems already after the first round to be contributing to the team’s progress towards a preferred way of working together.

See Appendix T for a more a summarized account of how phenomenology worked in a team coaching session, which marked the completion of this milestone, in terms of both process and outcomes.

5.6.2 Round 2: Issues 4-6 addressed during April 2005

5.6.2.1 Strategic alignment was necessary

In essence this meant that the business plans of all six business units had to be integrated. A bonus would be if the team realised the need to integrate the strategic goals of the company with the cultural outcomes under discussion, at the end of the process.

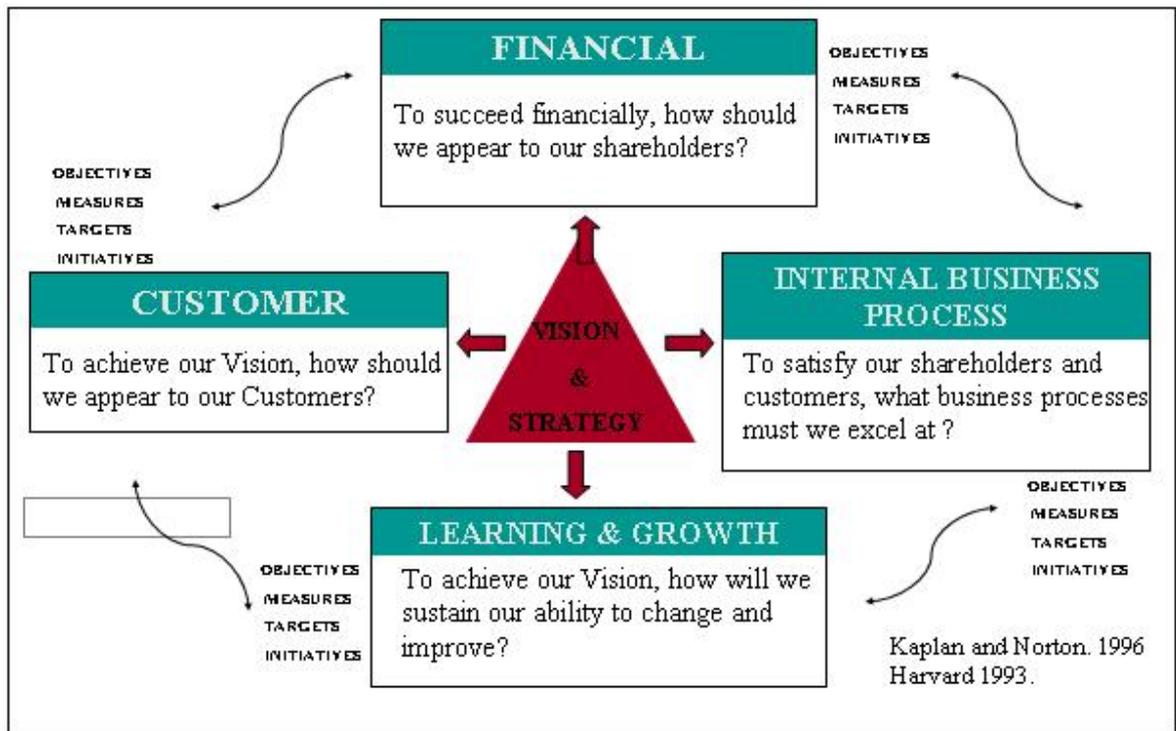
Team coaching resulted in meaningful decisions having been taken. First a set of leadership practices were identified as key areas for development:

- To set common goals and communicate these to everyone involved.
- To collectively (as executive team) decide on priority issues and to ensure that these get measured.
- To make goals more challenging by linking measurements to them.
- Goals should be set by management, whereas some freedom as to how the task gets done should be left to the individual whose responsibility it ultimately is to do the task.

-
- To review their current performance management strategy so as to provide for measurements and to institute this as part and parcel of the new strategic drive within the organisation (see people management)
 - The above should facilitate more clarity as to who reports to whom and what their responsibilities are, and was hoped to provide each individual with better motivation to achieve better results.

Second, it was decided to combine the balanced scorecards of all six business units into a scorecard for the organisation. Third, the newly written company was closely compared against a SWOT analysis which had been generated by the team during the analysis part of the Strategic process, prior to them analysing their organisational culture. (Refer to the fully integrated Balanced Scorecard of Epsilon in Appendix P.)

Figure 15 The balanced scorecard pro-forma used by Epsilon



Source: Kaplan and Norton (2006)

Individual coaching outcomes regarding progress having been made with the fostering of above agreed leadership practices:

- “We are more aware of each other’s business now.”
- “We have taken a couple of steps forward quicker than we would have done without this process.”
- “We know better where we stand with certain things.”
- “The fact that we know each others business now and that we have one Balanced Scorecard for the company, brings about transparency, awareness, better reaction time and therefore more achievement and support.”
- “The work of both sales strategy and project evaluation sub-groups have been incorporated into our management meetings. This means that we are starting to integrate culture with business.”

5.6.2.2 Cooperation between project- and consultancy-oriented business units had to be established

The rationale behind this was that motivation needed to be created to work across business unit boundaries at higher levels of responsiveness. The common sales strategy having been instituted (see Issue 1) was an important first step towards setting common sales goals which involved both consultancy-oriented and project-oriented business units.

Leadership indicators which were to be addressed in view of facilitating the agreed preferred culture:

- To set common goals, communicate these with some allowance to challenge the rules and procedures currently in existence.
- To provide motivation to work across business unit boundaries.

Team coaching reflections revealed that the initiative relating to the monthly updating of the original sales strategy after coaching sessions made progress visible. The team saw various groupings of team members, who previously thought they had nothing in common, visiting potential customers together and combining forces on new projects.

With regard to the perceived importance of cooperation, one individual reported the following: “I don’t want to work alone, relationships work for me, that’s what works for me, and oh, yes, trust works for me too!” while another thought that he may be a threat to some team members because of his bold selling approach. The latter undertook to be more inclusive in his quest for new business.

The outcomes expected once better cooperation had been established reflected an overall positive expectation that both a stronger sense of achievement and stronger support across business unit boundaries could result:

- “The idea regarding improved *curricula vitae* supporting decisions as to whom to delegate which jobs to, will lead to better results with customers.”
- “Special competence areas discovered among staff members will make them feel used and recognised and is supportive to customers and our own business competence.”
- “Once the Caesar system (see commitment made under sales strategy) is used by all and up-to-date it will be a good support system for sales. We have all accepted it and it makes sense.”
- “There is more support for projects than before.”
- “We are more aware than before of how we should work together, although we may need some action steps like we have in the sales and project work-teams.”
- “The organisation will have better direction, a better working atmosphere, attract more customers over a longer term and it will be a preferred company to work for.”
- “We will hit our targets faster and we can do better business, expand our markets and have fun going to work.”
- “Once we have a strategy for better cooperation, we should have standardised communication to stakeholders”
- “We are talking much more and more openly.”
- “We are starting to sell each other’s business, but need to focus on this much more.”

5.6.2.3 A project management strategy was needed

During team coaching it was decided to allocate the responsibility of heading this task to one person only, and for the team to assist him with input, test runs and feedback. This decision was unanimous, and the person chosen to develop this system was highly regarded and trusted by all. During a team brainstorming session it was decided to list a number of key points which could be useful to consider in the development of this system:

1. That the checklist which was in use at the time be applied to calculate risk and ensure that all questions with regard to a new project are answered. It is a tool which supports decisions to quote or not to quote.
2. This checklist had to be sent to all for comments.
3. The projects unit had to apply real figures to it in order to test it out.
4. To develop a best-practice guideline for the management of projects, including a software programme which interfaces with the reporting systems of the organisation.

5. Policies/guidelines of best practice need to be developed and incorporated into project training workshops (see competence development).
6. Controlling inquiries coming in and those going out was a must.
7. The system/programme designed should be able to do quality checks on cost calculations.

During individual coaching regarding the contribution that the project management system already made to those who know and use it, plus which contribution it should continue to make to the development of a preferred organisational culture, perceptions confirmed positive shifts to be attained concerning better role clarity, improved control, a sense of achievement as well as stronger support.

5.6.3 Round 3: Issues 7-9 addressed during month of May 2005

5.6.3.1 *An improved Company Image and increased public awareness was necessary*

Team consensus was reached regarding the inclusion of the new Vision into all future marketing efforts. The decision to keep the current, lengthy Swedish company name was disappointing to some but accepted by all.

Every business unit leader was asked to determine their own marketing strategy, as before, while thinking creatively along the lines of getting involved in community and school projects to increase their positive company image, and market visibility. Unfortunately this issue was delayed because it was felt that the outcome of the research project would contribute to better informed marketing decisions.

5.6.3.2 *People management needed to receive more attention*

The team decided that this issue needed to be addressed in the one-on-one coaching sessions due to the individual nature of this leadership practice. This issue links closely to the need for proper Performance management and also the Strategic alignment issue.

Once strategic and cultural alignment were achieved and performance measurement was agreed by the executive team, every business unit manager should introduce the staff of their business unit to the new vision, company balanced scorecard and relevant divisional balanced scorecard, and the improved performance management form (a result expected from the small team researching the performance management issue, see below). Every member of the divisional team would be asked to complete this form with their goals in mind, followed by performance planning discussions between business unit leaders and individual members of the divisional workforce.

The questions posed to team members during individual coaching sessions related to the combination of cultures they believed would foster better people management. As can be seen from their responses, all agreed on the key people management practices which would foster the agreed preferred cultures:

- “Before we did the cultural training day I could see the power and support cultures, but did not know what was in the middle of that. Before this session I thought that support would be best, and only support culture, because my view was that you should have team building without you having to tell people what they should do. After this workshop, I think that maybe you should have something in between power and support. You have to give them some roles and set some goals.”
- “My people know where they stand. I explain things to them.”
- “People like working here. I focus much on keeping them motivated.”
- “I allow people to do things on their own.”
- “I try to increase their responsibility and authority. All of these things I view as part of my supportive role as a manager.”

The youngest member of the team reported that he would know that his team members supported and valued each other when he was able to phone them as peers to ask for their guidance. He could do this with only two people at the time, and would have welcomed it if he felt comfortable doing it with the others as well.

In response to my question relating to the sharing of best practice among team members, a strong need was indicated by all to be recognised for their strengths and contributions to the organisation and the team. Another shared his need for social interaction: “We need to have more social functions and invite each other and their customers out, so as to build relationships”.

5.6.3.3 Meetings had to be better managed

At the outset of this research project, which kicked off with a team coaching sessions, it was decided that the team needed to develop an organisational strategy before they could decide the needed organisational strategy. I suggested that a code of conduct be established, to guide the behaviour and focus the energy of all members during team coaching sessions.

When it came to strategising about this issue and the leadership behaviour/practices which would foster better meetings, it was unanimously decided that code of conduct which was developed by the team at the outset of this project should be adopted as the guideline for meetings in the future, since it had been in practice for a number of team meetings already

and it seemed to have the desired effect. (Refer to the complete Code of Conduct developed by the executive team, in Appendix Q.)

5.6.3.4 Individual coaching reflections with regard to improvements made with regard to the management of meetings

- “Improvements-to-date reflects better focus because discussions are divided into sales, projects, information and decisions. This reduces the frustration at meetings.”
- “New telephone meetings on Mondays instituted by the leader of this group are working well.
- “We know what is happening in all business units, it is informative and supportive.”
- “Meetings are still unplanned sometimes.”
- “Time is wasted with people looking for documents where they should have been prepared and agendas need to be followed more strictly.”
- “Mobile phones are still on during meetings and even telephone conferences.”

5.6.4 Round 4: Issues 10 – 12 addressed during June 2005

5.6.4.1 The way performance is measured in the organisation should facilitate project and consultancy cooperation

The team asked for some training in performance management and I offered two modules. Keeping in mind that this team saw a combination of achievement and support as their preferred cultural orientations, I chose the content of the training to facilitate constructive conversations around these two key leadership orientations.

The first module focused on the strategic importance to measure and manage performance. Key learning revolved around the type of messages leaders send into the company, particularly in the way that they manage the performance of their teams. The executive team together explored the questions which were posed on their current performance measurement form, and discovered that it allowed for ample subjectivity on the part of the leader and measured aspects unrelated to performance. They made an informed decision that, since their preferred culture focused on being more achievement-oriented, the measurements used when rating performance should reflect this new way of leading and measuring. This decision led to the deconstruction and reconstruction not only of their performance measurement form, but also their perceptions of the roles they as leaders should be playing to ensure that performance management would lead to enhanced achievement orientation. (Refer to the performance measurement form for Epsilon in Appendix R.)

The second module focused on implementing and practising better performance management as a key leadership competence. It stressed the importance of being supportive when working

with individuals around their future development and underlined the importance of developing a supportive environment which is conducive to openness about problems and facilitative of growth of the most important organisational resources. This would ensure the necessary attention to creating a supportive cultural orientation.

The next step decided upon was to critically evaluate their current way of planning and monitoring performance against the principles which they had learnt and to do the necessary enhancements to their process if need be. They decided that to make radical changes to the performance measurement system would create unnecessary resistance to change, the potential energy of which could be much better used to drive the newly decided organisation strategy. Therefore it was agreed that the forms related to the measurement of performance had to be easily understood and that managers should view it as management tool and not unnecessary paperwork. They did see the need though for it to address both performance and development since only the latter part was addressed before. They also realised that it should facilitate the reaching of the balanced scorecard and should therefore represent the language used on the latter. (See the new performance measurement form in Appendix R which satisfied the requirements of all team members.)

5.6.4.2 Competence development was needed in the core skills necessary to achieve successful business results

The team realised that to finalise a competence development plan prior to the new strategy and culture having been rolled out into the organisation, was like putting the cart in front of the horse. The resulting decision was to focus only on the most immediate need, namely project management competence, and to do a complete competence needs analysis once all performance planning and development talks had been finalised and a clear picture had been developed with regard to the competence development needs of the organisation.

It was decided to go ahead and source a project trainer, and by the end of this research project 27 members of the organisation had already been trained in project management. The next step was to get these newly trained people working as a group so as to develop the following policies/guidelines of best practice, to be incorporated into all future project training workshops:

- How to lead projects?
- How to staff project teams?
- Which project process to follow?
- Project checklists and control measures to be used.
- Who should report on projects to whom?
- How to measure projects?

The above best-practice guidelines in project management also had to feature in the system being designed for the managing and monitoring of project results. The outcome of this can not be shown here since it represents a crucial part of the competitive advantage of the client organisation in the field of project management. All the feedback received during one-on-one coaching sessions indicated that the system designed to manage and report on projects, coupled with the newly acquired project management competence, significantly increased the achievement potential of the organisation.

5.6.4.3 An induction programme was necessary to orient new members towards the organisation

In the absence of a human resources function the team decided that every business unit manager would be responsible for the induction of new staff members in their business unit. With regard to the content of such an induction programme, the team agreed that what they had generated up to this point (in the form of confirmed company name, new vision and strategy, business unit strategies, sales strategy, performance and development planning system, and a project reporting system) offered substantial information and material to every business unit manager in orienting new staff members entering the organisation.

At the final team coaching meeting which also served to wrap up the complete process, a checklist was completed which represented the original issues and how these had been addressed. It was clear that more progress had been made on some of the issues addressed earlier, and less on those addressed later in the process, because these agreements were instituted earlier and team members had had time to practice the agreed behaviours relating to these issues. The team nevertheless agreed that enough progress had been made in total, and committed themselves to continuing growth and development in those leadership practices which they had committed themselves to display to a greater extent.

This section served to inform Objective 1 which reads to investigate the use of coaching to facilitate agreement, among all members of an executive team, regarding the preferred culture in the organisation.

The final objective to be addressed for purposes of reporting on the results of this research project was the commitment that the executive team made to the continuing practice of the preferred cultural indicators/behaviours to facilitate the company's agreed preferred culture. Details of this are discussed under Milestone 6 of this chapter.

5.7 Key learning points and personal reflections up to this point



I had learnt that it is useful to, at the start of every intervention make explicit which role I would be playing during the course of that particular intervention. For instance, when there was a need to transfer knowledge, I reminded them that this role was different from the coaching role I often played in the team. At other times, I was asked to provide advice, and I found it useful to remind them that this role is more directional in nature than that of a team coach. This clarification of role was important for various reasons: Firstly, it was educational in that everyone became clearer on what each role meant. Secondly, expectations were more realistic as to the role that I was playing, and thirdly it acted as a self-check to ensure that I kept my coaching role as “pure” as possible.



The reason I feel this way may stem from their expectation of me to take a stronger lead in the sessions, which means telling them what to do. I realised that they were missing the direction-giving role I had played with them as consultant prior to this research project having been launched, and that we all had a need to adapt to the new coaching role that I was playing.



I discovered that the executive members of Epsilon were not used to sharing their experiences of situations such as team gatherings. Consequently, when I asked them to send me an email to express their personal experiences of coaching sessions after these had happened, very few responded. This led to me posing some closing questions after each coaching session, aimed at discovering their perceptions and reflections upon our time together.



Upon personally reflecting on my learning journey at this point, the realisation came to me that if I find it hard to reflect on some of my coaching experiences in a way that makes sense to others, how much harder must it be for my clients, who are engineers (good at being action-oriented) to learn how to reflect upon an experience (coaching) which is so vastly different from any other process to which they had been exposed.

It was especially the above learning points and reflections which influenced my continued learning on this journey of discovery to becoming a more professional coach.

5.8 Milestone 6: Setting goals to facilitate the agreed preferred culture

Objective 6 of this research project was: To define a set of personal and team goals aimed at the implementation of leadership practices which would facilitate positive growth towards the development of the team's preferred culture.

Through the team coaching sessions above, agreement was reached in terms of the developmental activities which the executive team should undertake in order to ensure the facilitation of the agreed preferred culture. During these sessions priority areas were identified, brainstormed and plans formulated for its development. The one-on-one coaching sessions which followed team coaching sessions were aimed at probing the feasibility of developing or enhancing those leadership practices which would represent the preferred culture for themselves and their business units. Individual leaders then had to decide upon those behaviours which they felt that they could and wanted to address in terms of leading their own team of people. Individual plans took the form of balanced scorecards for each leader's business unit, and integrated well with the strategic direction decided upon for the client organisation. The fact that the balanced scorecard had been chosen within which to represent these cultural alignment goals was possibly more than I could have hoped for, because this effectively meant that they saw a close relationship between strategy and culture. This relationship was perceived to be so close that they were willing to put their commitment to fostering the preferred organisational culture alongside the strategic goals they committed to, for all to see, on one balanced scorecard.

The following section is aimed at reporting back with regard to the summary of commitments made to the various quadrants of the balanced scorecards, especially the preferred culture which each of these represent.

In summary, the following commitments were made with regard to the preferred cultural indicators which would receive attention with regard to how customers would be managed in the future:

- To apply ISO (see Glossary of Terms in Appendix U) tools to generate customer feedback. ISO refers to the standards defined by the International Organisation for Standardisation, to which international businesses must conform in order to prove their commitment to and ability to deliver work up to international quality standards. As such this is an indication that the role orientation should be tightened up in the form of abiding

by set norms and standards. This goal also reflects a strong achievement orientation in that compliance to international standards immediately opens up business opportunities for such organisations.

- To provide ongoing feedback concerning customer satisfaction to all staff in order to facilitate growth and improvement. This objective serves to inform staff with regard to their customers' satisfaction levels, and so supports them with important info upon which to improve their performance and so achieve better results.
- Provide optimum service by offering the most appropriate competence available. This objective clearly aims at better achievement of customers' goals which should ultimately serve a better outcome and so enhance the image of the organisation as perceived by its customers.
- Keeping all staff updated regarding customer needs and feedback. This action is necessary to keep staff updated and informed in order for them to be geared towards better delivery of services which the customers reportedly wanted.
- Encouraging personnel to build and maintain a customer network. This would serve to build a supportive network and could serve to improve communication and cooperation among the various business units of the client organisation.

In summary, the following commitments were made concerning the preferred cultural indicators which would receive focus when attention is given to the smartening up of business processes in the client organisation:

- Leadership involvement in deciding on the strategic viability of all potential projects. This reflects less power and more supportive leadership.
- Leadership contribution in ensuring optimum results on all projects. This indicates strengthened support but also role definition on behalf of leaders.
- Leadership support in terms of establishing teamwork and a sense of pride and belonging.
- Enabling cross-selling opportunities which could foster closer working relations between various business units, which indicates a needed strengthening of both achievement and support orientations.
- To stimulate better cooperation among various business units through a focused approach to using our total competence, which again represents both of the preferred cultures, namely achievement and support.

Finally, the summarising of commitments made to the development of people and their potential revealed the following:

- To agree competence development goals for every staff member which would strengthen the achievement potential of each employee.
- To stimulate employees to explore new challenges (work in different areas) and so expand the roles which they play, according to what they feel excited by and are interested in.
- To provide the necessary resources for the development of all our employees and by doing so, increase their achievement potential.
- To develop a culture which fosters achievement by ensuring individual goal setting and motivation necessary to reach these.
- To encourage each employee through engagement and encouragement to proactively plan for future business and the competence necessary to achieve success, providing a learning environment through the sharing of lessons learnt and considering employees personal interests and circumstances when placing them on new jobs.

It is clear that both business unit scorecards and the organisational balanced scorecard, reflected goals aimed at fostering the preferred combination of cultures in the organisation to reflect less power, more appropriate roles being identified and clarified and not a stronger role orientation *per se*; a very strong achievement culture followed by a strong supportive culture.

5.9 Conclusion

The project process previously described is made up of steps within milestones, the outcomes of which inform different objectives and serve to provide the content of Objective 2 which aimed at “mapping out the coaching steps developed in the process of facilitating agreement among all members of an executive team, regarding the culture that they prefer to have in their organisation”.

Chapter 6

Conclusions and Recommendations

6.1 Introduction

This chapter focuses on the learning which took place for me as coach through conducting this research: I first highlight those cultural aspects which informed my coaching, followed by a critical review of the research process and the usefulness of the learning for myself and other organisations about to implement coaching initiatives. Finally some learning points and some critical personal reflections are shared, with a view to provide impetus to potential future research in this area.

6.2 Key learning about Swedish culture

- Having a team of eight diverse people agree the leadership practices which they should display in order to develop a preferred organisational culture, within a relatively short period, proved to me that coaching is an excellent vehicle to investigate Swedish people's perceptions/views/fears and expectations concerning the deep-seated issues of personal values and how to live these.
- The value of healthy peer pressure was proven: although Swedish culture does not reinforce competition, the principle of personal responsibility gets inculcated from a young age, resulting in a high level of maturity and initiative to do what needs doing without being prompted. This proved extremely worthwhile in this particular study, in that it fostered a sense of co-ownership and responsibility among a Swedish team of executives to commit to a plan of action regarding their preferred organisational culture.
- The Swedish way of reaching consensus through meaningful conversation was instrumental to progress to reach agreement, since it fostered an environment within which team members could openly express their perceptions, knowing they were being heard and that their opinions would be taken into account.
- The above realisations led to substantial growth in my coaching approach. I fully intend to practice this newfound wisdom and skill on prospective clients in South Africa (my home country) where teams are often culturally diverse.

6.3 What did I learn from applying the research methodology?

In this section I focus on lessons learnt from having chosen a particular method of research and tools for data collection and analysis. I also conduct a post assessment of the feasibility of having approached this piece of research in the way that I did.

6.3.1 A critical look at phenomenology as a method of study

To evaluate the appropriateness of the chosen method of study in achieving my main objective, I shall evaluate my experience of the three distinguishable features of the phenomenological research method, described in Chapter 3, which attracted me to this method in the first place.

6.3.1.1 The importance and primacy of the subjective consciousness

Phenomenology served me well in finding out how the various individuals, who collectively formed the executive team of Epsilon, consciously experienced their organisational culture.

6.3.1.2 An understanding of consciousness as active and bestowing of meaning

As researcher and coach I attempted to capture the experiences and interpretations of a number of executives of their organisational culture at a point in time. Through discovery of the meaning that the current culture held for each of them individually, and for the team collectively, they created a perception of the way they wanted it to be in the future when it would have more meaning. The fact that they were within an organisation, within themselves and with others, correlating both outer and inner experiences and meanings, proved to be useful in reaching this agreement of their preferred future cultural state.

6.3.1.3 A claim that we gain knowledge of meaning through reflection

In this particular study, the perception of leadership behaviour and its underpinning beliefs, behaviours, practices and feelings, and how these related to the values of others, formed the essence of my discovery. Through coaching every participant made sense of their experience, based on their own interpretations, which they reflected upon with the coach to search for those behaviours which would be personally meaningful.

In conclusion, I found phenomenology a challenging choice of research approach and will use it again if I can limit my role to that of coach, which would mean that any training and facilitation would be carried out by someone else. Section 6.3.3.2 discusses this point further. Please refer to Appendix S for a critical reflection of how I experienced phenomenology and what happened in practice. Actual transcripts and reflections written in action will be used as a basis to make this more explicit.

6.3.1.4 Re-evaluating the usefulness of using action research as a methodology

After much reflection I have come to the conclusion that action research could have been an appropriate methodology had I expected that the process would evolve as quickly as it did to offer content-specific goals (chosen by the members of the team themselves and written into their balanced scorecards, thereby taking control of their own learning) to be achieved resulting in actual behavioural shifts. It would, however, have called for careful attention being paid so as not to evaluate and steer decision-making from the side of the researcher, or on behalf of any member of the executive team, a possible result which Corey (1953: 6) warns us against, since the main aim was to reach agreement through a process of coaching and not decision-making. I am open to the possibility of approaching the next process (of this kind) considering action research as the main methodology.

6.3.2 Evaluation of the data collection and analysis methods used

6.3.2.1 Questionnaire

I am satisfied that the cultural questionnaire by Harrison and Stokes (1992) was appropriate. The questions posed in this questionnaire reflected leadership practices/behaviours which were very relevant during coaching sessions and, I am sure, assisted greatly in developing momentum in the coaching process.



The wisdom of Harrison (1995) and Harrison and Stokes (1992) in tying organisational culture to the mission of the company in order to facilitate buy-in and participation from those who will be affected proved very appropriate. The team saw such a close link between strategy and culture that they added cultural goals to the strategic goals on one balanced scorecard.

6.3.2.2 Coaching

(a) Team coaching

I use the term “team coaching” tentatively, the reason being that I still have to distinguish clearly between group facilitation and team coaching. The processes are very similar in that both aim to provide space within which a group of people can progress from a current state to a preferred state, with an end goal for the session having been agreed by all. This definition fits, in my mind, both coaching and facilitation.

For this reason I thought it useful to reflect on my own distinction between these two competencies as well as how and when I applied which during the course of this research

project. First I shall distinguish them for myself, after which I shall attempt to determine what the basis for my distinction is, and lastly I shall identify, through reworking my reflective notes, when I applied which.

- **Team Facilitation**
 - Specific Goal
 - Outcome is agree, described and measurable

 - Approach: A structured time created for meaningful conversation, linked to the planned outcome.

 - Purpose is to reach agreement at the end

 - Skills needed:
 - Facilitating discussion
 - Ensure conflict resolution

 - Role: Managing the process with a view to reach a state of harmony amongst team members

- **Team Coaching**
 - Specified of unspecified goal
 - Outcome hoped for
 - Shared concern/meaning
 - Increased Understanding

 - Approach: A safe, unstructured space is provided for the sharing of personal meaning through conversation

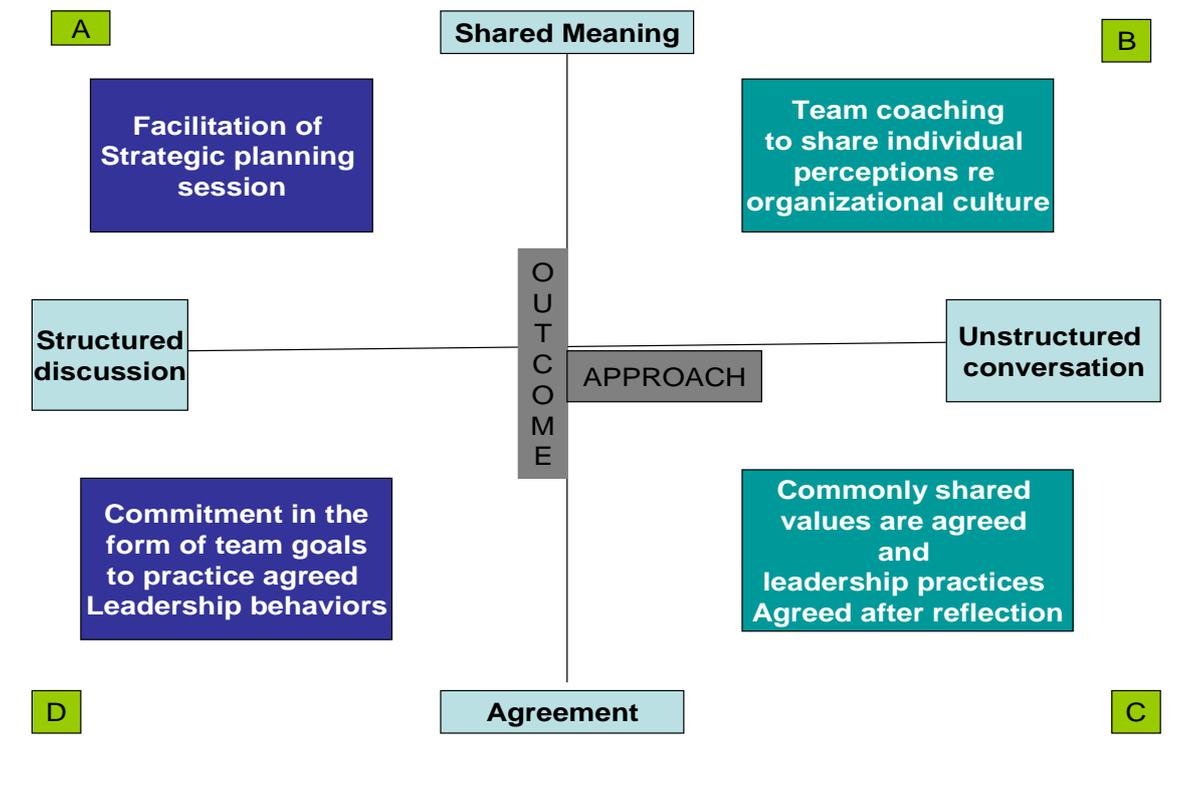
 - Purpose is to share meaning, which could or not lead to agreement

 - Skills needed:
 - Acceptance of others' meaning, opinions, views
 - Valuing differences in the above

 - Role: Supporting team to find common meaningfulness and shared values/views/concerns which could result in an agreed future state of increased meaningfulness for all.

Upon closer scrutiny, the two concepts seem to distinguish themselves in my mind where their purposes and outcomes are concerned. These two distinctive concepts have been used to illustrate (in Figure 16) why I found them to be appropriate in different settings, during the course of this research project.

Figure 16 The difference between group coaching and facilitation



In short, quadrant A describes the structured approach I used to facilitate the process whereby the Epsilon executive team decided their future Vision, Mission and Balanced Scorecard. Quadrant B described the team coaching approach used to allow a safe space within which the sharing of meaning could happen and shared meaning could be discovered. In essence, the Epsilon team shared their personal views/perceptions and experiences relating to both the current and preferred cultures of the organisation, which made it possible for them to discover shared meaningfulness. This process evolved further in Quadrant C to the point where the team reached consensus regarding the future organisational culture they agreed would be more meaningful, after which a more structured facilitative approach was used to allow for the setting of team and individual goals to be achieved with regard to the practicing of agreed leadership practices.

Team coaching, followed by individual coaching, worked well for me. The further division of the executive team into smaller work teams (after agreement was reached regarding the priority issues needing attention) made a tremendous impact on the team's cooperation. It also supported progress with the research process.



This outcome was empowering to the team in that it resulted in individuals taking ownership and responsibility. It also gave them the opportunity to facilitate next time (in an effort to get them to learn about facilitation, thereby empowering them).

An interesting observation about the code of conduct, which was agreed at the outset by the team, is that it cut across critical issues such as communication, commitment and responsibility, as well as information management, and that it was defined before these issues were formally addressed.



Significant progress was made towards the agreed preferred culture in terms of leadership behaviour displayed during meetings which followed the agreement of a code of conduct. The most significant aspect I noted was that everyone seemed naturally more supportive and focused on achieving common results. From this I deduced that they were already more comfortable to behave supportively towards each other "publicly"; this was one of the outcomes for which all the stakeholders were originally hoping.

(b) Individual Coaching

My learning from coaching the executives, who formed part of the same team, was significant in that I learnt to deal with each individual's perception of their own resourcefulness, i.e. being able and willing to commit to the leadership practices agreed to by the team. It confirmed my original thinking that agreement of preferred organisational culture has to do with the commitment of leaders to re-evaluate their personal values.



If this was a challenge to me as coach, working in a country where everyone shared the same culture, I imagine I can learn much in a country like South Africa, where most executive teams are from at least two or three different cultures.



Carrying out the team coaching and the personal coaching of all team members was tougher than I originally thought. To keep all matters discussed within the boundaries of the coaching forum was taxing but very rewarding, in that I walked away dignified, having further enhanced my credibility with this client organisation.

(c) Has ethical conduct taken place throughout the process?

My personal coaching ethics facilitated the achievement of meaningful results, while at the same time dealing with sensitive issues, in a confidential and professional manner. The agreement I entered into with the executive team of the client organisation facilitated my ethical conduct in relation to:

- Confidentiality and ownership of findings was clarified and it was decided that the final report to be scrutinised by my client prior to it being published in any publicly accessible source.
- Expected measurable outcomes were specified, with deadlines as well as the roles to be played by both researcher and client.

(d) The use of recordings, transcripts and reflection and the issue of triangulation

The fact that I made sound recordings of almost all of the coaching sessions facilitated my own reflections upon my coaching approach and the outcomes achieved with coaching. The intention was that my coaching clients (i.e. the members of the executive team) each keep a coaching diary in order to record their perspective on the coaching event, as well as the

feelings they had in relation to them, and also to generate insights into the coaching process itself.

In reality, my clients (members of the executive team) were either too busy to keep diaries or did not think it appropriate to write down their reflections, so I substituted reflective questions at the end of every coaching session (group and one-on-one) for coaching diaries to encourage reflections “in the moment”. I also started every consecutive coaching session with questions which prompted reflection on the previous coaching session, in case the client’s reflections had changed or deepened since the last session.

Triangulation was not achieved 100 per cent. Had my clients kept research diaries, I may have been able to explore their behaviour from yet another angle. It may thus have been easier to validate my perceptions against those of my clients to ensure that the consistency in my findings was not attributable to similarities of method but to agreement among team members. On the whole, the main objective of this research project was still achieved, in that agreement was obtained by a group of executives regarding their preferred organisational culture.

6.3.3 An objective look at the feasibility of this research project

With any study, looking back, one discovers issues which either facilitated or complicated the research. Here were some issues I have discovered.

6.3.3.1 Factors which facilitated this research

(a) Knowledge of and credibility with the client organisation

Having consulted to the client organisation previously, and having known three of the eight executive team members at the outset of this research project, helped. Having built credibility with them in terms of achieving the deliverables to which I had committed myself in previous projects, also helped a great deal. The relationship we had was one of mutual respect and trust.

(b) Financial compensation for complete research project

The fact that I was paid for the complete research period by Epsilon, was of great assistance to me and my family, since this was the sole reason why we extended our stay in Sweden for six months. It also strengthened my confidence in that the client organisation must have viewed this project as economically beneficial to its business.

(c) Focusing on the research project as main area of work

Having successfully completed the EU project for which I had originally gone to Sweden prior to the initiation of this research project meant that I could focus completely on the latter. This

was just as well, as the six different business units comprising Epsilon were many kilometres apart, and a lot of travelling was necessary. I could also focus my energy in a meaningful way, and although I had incurred a serious back injury during this time, my mind was set on achieving what I had set out to do in the time agreed with my client and to the satisfaction of all my stakeholders.

(d) Support during time of study

I had the unwavering support of my partner/husband during this time, both financially and emotionally. I also had the support of my study leader Mike van Oudtshoorn to guide my thinking, particularly in terms of the coaching approach to this research. What I missed was someone who could coach me during this period. I did not have time left, nor had I met the right practitioner (being based in Sweden), neither did I have any Swedish crowns left to pay for this. In retrospect, it would have been useful to have received coaching supervision during this time, especially since the coaching I did was quite intense and complex.

6.3.3.2 Complicating factors

(a) Difference in values

At the outset of the coaching part of this research process, I expected my client to challenge my value relating to not giving my clients advice, and challenge it they did. In their view, the consultative role I played in the client organisation prior to this research project warranted the provision of advice and direction. On the other hand, the coaching role which I played during the research process focused on facilitating a process in which the client could find their own direction and generate their own options/solutions. Although I made a point of clarifying my role at every event, the team would have much preferred me to provide them with direction and answers, instead of finding it out for themselves.

(b) Language differences

The most difficult coaching I had ever done was with the MD of the client organisation due to our language barrier. My coaching sessions with him were short and the result was that I did not achieve the same depth of understanding of his perceptions with regard to the preferred culture as I achieved with his peers.

(c) Timeframe

The original timing which was negotiated would have been enough to complete the research project. With the change of plan to first develop an organisational strategy, the final month's discussions did not receive the same quality input as that of the previous months.



If any future project of this kind is to be undertaken, I will ensure that the client organisation has a proper business strategy in place. Should they not, they need to work with someone else to get this in place, prior to me playing my role as coach attempting to assist them with their cultural alignment.

(d) Playing multiple roles

Usually, playing multiple roles such as that of facilitator, trainer, consultant or coach does not pose a challenge for me, nor does the switching of roles when it is required and acceptable to do so. The complication arises when the client does not know quite what to expect from which role. This needs to be clarified upfront so as to ensure realistic expectations all-round.



It was tempting to run the strategic and cultural alignment processes in parallel, but I am glad this was decided against, because deciding strategy should clearly involve a consultative process, whereas cultural alignment is clearly more suited to coaching. This could have contaminated the results.

(e) Contracting

At the outset of this research project it was mentioned that my need to formalise the contracting part of the coaching relationship may pose questions in the mind of my Swedish clients, since one of their basic values is that “a handshake is good enough”. None of the team members of the executive team saw the need for formal contracting. Having listened to the tape recordings of all the coaching sessions, I am confident that all the members of the team opened up without restraint. The part which I regret not having contracted was that of the “diary notes to be kept by subjects”. I ended up not getting much feedback in the form of diary notes from my clients, with negative consequences for the achievement of triangulation, as discussed in Section 6.3.2.2 above.

6.3.4 Significant learning

6.3.4.1 Personal

Through time I have learnt that my personality lends itself to a directive approach in relation to most people. For this reason, choosing phenomenology as a research methodology actually promoted my professional development as a coach. This was because the phenomenological approach helped me learn to let myself be led by my client’s perceptions and awakenings while I provided a safe space within which they could make sense of; discover and experiment with their own thoughts, ideas and behaviours.

Another aspect of my professional conduct which received tremendous growth during this research project was my realisation of the importance to contract with my client, not just in terms of the outcomes expected from my involvement with them, but also in terms of the roles each of us would play and the responsibilities we would each take up in the coaching partnership.

6.3.4.2 Other coaches

The process which evolved in my attempt to get a team of executives to agree on their preferred culture, could be useful to other coaches who work in the area of values and culture with to the aim of achieving alignment. They could use this as a case study, learn from it, and hopefully be informed about some of the pitfalls and success factors they may care to take cognisance of, especially during the planning phase of their prospective coaching initiative.

A project approach to the management of the process similar to the one I used could certainly be of value in providing an initial broad outline to their client, with the purpose of agreeing a timeline for implementation. This is especially useful when dealing with an action-oriented client who insists on the measurement of results in terms of time, and who expects feedback at regular intervals regarding progress made..

6.3.4.3 Institutions considering coaching initiatives regarding culture and values

Having a strategy in place is key to the success of an alignment of values/preferred culture in any organisation, in my book. The rationale for this stems purely from my personal experience explained already in Chapter 1: Strategy determines what needs to be done and Culture determines how things are done. Consulting experience taught me that a client's dissatisfaction often stems from the way he was treated even though the parameters of time and cost were reached.

Should an organisation be results-driven and have a project approach to doing business, a project planning approach could be a great selling point in an attempt to get a prospective client to buy into a proposed coaching initiative.

Allowing the coach to play the role of a coach and not expecting him/her to consult should foster the perception that the coaching initiative is supportive rather than directive. The internal clients (company members) may feel more comfortable with a coaching initiative of which the goals are personal and the results are kept private, in stead of one where desired outcomes are set up as the organisation's goals for coaching.

Where alignment is imperative, team consensus should precede individual coaching to ensure focus and energy direction on behalf of the coach.

6.4 Where to from here?

This section deals with my own critical reflections upon this research project. It serves to energise me to continue with further research in this area of work, and I hope to inspire others to do likewise.

6.4.1 Unanswered questions in terms of my project

A key question which remained unanswered was why the MD's scores were so significantly different from the rest of his team, yet he agreed to most of the leadership practices chosen by the team as the critical issues needing attention to facilitate the preferred organisational culture. I know that the MD agreed with his team on preferred leadership practices, and that he ultimately put together the organisational balanced scorecard himself, which reflects definite cultural goals. This, I thought, provided enough evidence that he was convinced that a change in culture would be appropriate. Given time and the ability to coach him in Swedish, I would have liked to probe the issue of how comfortable he really was with the leadership practices which the team identified and committed to in terms of facilitating the preferred organisational culture.

To make more explicit my understanding of the MD's transformational processes, I had a follow-up discussion with the person who was his second-in-command at the time of the project. The purpose of this conversation was to try and understand to what extent the MD's commitment to changed leadership behaviour facilitated real change in his personal leadership style beyond the project. The first question I posed was whether the MD could have misunderstood the instructions of the questionnaire, to which the answer was "not really". This may mean that he truly perceived the current culture at the time of measurement to be acceptable.

The second question I asked revolved around the MD's acceptance of the agreed leadership behaviours which needed a stronger focus. The answer to this was that he seemed to have been convinced by the rest of the team that a stronger performance and support oriented culture is the way to go and was willing to give it a go. As to whether the MD made a real effort to be more inclusive and open, show stronger support and recognition for a job well done (some of the leadership practices in which he agreed to invest some energy), the answer was positive.

The fourth and last question revolved around the long-lasting changes in leadership style of the MD, to which the answer was less encouraging. Subsequent to the project reaching an end in June 2005, some management changes had come about, most of which seemed

positive results from the coaching intervention. The MD decided to leave the Epsilon-company at the end of 2007 in order to manage a smaller engineering design office of a different organisation, yet similar industry, where he would be in complete control of the business. From this feedback I gathered that adaptation to a changed leadership style was indeed challenging for the MD of our Sweden-based client organisation, and that perhaps he finds himself more comfortable in a smaller organisation where he can exercise complete authority. Could it be that through coaching the work environment in the client organisation has changed to the extent that the previously exercised leadership style did not fit anymore?

6.4.2 Further research necessary

With regard to taking this study further, I would be curious to discover:

- How much progress the client organisation of this research study has made with regard to establishing their preferred culture.
- Whether the MD has made any significant shifts in his leadership behaviour from his previous style toward the agreed preferred practices.
- How the results of a Swedish-language version of Harrison and Stokes' (1992) cultural questionnaire would compare to an English-language version completed by the same group.
- Which team coaching approach would be most appropriate to use in an attempt to reach consensus with regard to preferred organisational culture in a multicultural team such as the corporate clients I am most likely to work with in South Africa.
- How to distinguish between group facilitation and team coaching and define their boundaries (if any) for the purpose of attributing results to either the one or the other during research.

6.4.3 How would I do it differently next time?

- I would enquire about the most recent and agreed company strategy for the organisation that requires cultural alignment. Should this not be in place, I would suggest that the client do strategic planning first, after which a more meaningful cultural alignment process should follow.
- I would make a more definite choice as to the roles which I would be playing for my client, and which roles I would sub-contract to another competent individual. For instance, I would not do the team coaching as well as the individual coaching of all the team members on my own, but rather choose one of these roles, and leave the rest to a reputable coaching partner.

- I would ensure that my client understands either Afrikaans or English very well, and not just be able to express themselves clearly but also be able to express their true feelings in the language used for coaching.
- I would contract the keeping of coaching diaries by the client as a prerequisite for the achievement of triangulation by explaining the effects of not achieving the latter to my client.

6.5 Conclusion

The openness with which my clients intended to share what was both viable in a business sense and personally meaningful, gave me hope that their efforts in terms of practising the behaviours upon which they had decided would ensure progress even beyond this research project.

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Appendix A
Reflections With Regard to Research Methodology

Appendix B
Agreement With Epsilon

Appendix C

Agreement Regarding Use of Research Findings

Appendix D
Coaching Contract

Appendix E
Organisational Culture Questionnaire

Appendix F
Research Portfolio

Appendix G

**Summary of Outcomes of All First Coaching Sessions With Each
Executive Team Member of the Client Organisation**

Appendix H
Milestone Plan

Appendix I

Workshop Presentation on Corporate Culture

Appendix J

Summary of Buy-in Coaching Sessions

Appendix K

The Balanced Scorecard of Epsilon

Appendix L

**Bar Chart Comparing Existing and Preferred Cultural
Scores Rated by the Executive Team**

Appendix M

**Bar Chart Comparing Existing and Preferred Cultural
Scores Rated by the Representative Team**

Appendix N

Variance in Scores - Members of the Executive Team

Appendix O
Sales Strategy

Appendix P
Completed BSC for Epsilon

Appendix Q

Code of Conduct Set Up by the Executive Team of Epsilon

Appendix R

Performance Measurement Form for Epsilon

Appendix S

**A coaching session with the MD to probe his perceptions
regarding the results of the Organisational Culture survey which
he and his team had completed**

Appendix T

**Summary of the process and outcomes of team coaching where a
phenomenological approach was used**

Appendix U

Glossary of Terms

Action Research: This type of research is applied to practical issues occurring in the everyday social world. It attempts to change and monitor results. The key is the involvement of as many of the work group as possible in the process of change. It starts with a problem and aims to take action to improve the situation. It focuses on the researcher as seeking to improve aspects of their client's practices.

Analysis of Data: Data analysis is an ongoing process which should occur throughout the research process, with earlier analysis informing later data collection. It may often be considered as a reciprocal cycle. It is equally important at the research design stage to consider how the researcher will use the data they intend to collect. To be valid, interpretation must be firmly based upon a reasoned analysis of the data the researcher has collected.

Scorecard: A balanced management system, incorporating all key performance areas pertaining to the strategy of the particular business for which it is written.

Coaching: The professional association for Coaches and Mentors of South Africa (COMENSA) defines coaching as "a professional, collaborative and outcomes-driven method of learning that seeks to develop an individual and raise self-awareness so that he or she might achieve specific goals and perform at a more effective level" (COMENSA, 2006: 6). Coaching is as much about the way things are done as about what is done. Coaching delivers results in large measure because of the supportive relationship between the coach and the participant, and the means and style of communication used by the coach.

Diary: A diary is a document as well as a tool to collect qualitative data. A diary can include detailed information on someone's behaviour, and is especially good at revealing the writer's perception of events and their feelings relating to these.

Ethics: That discipline that points out that it is necessary for everyone to know the minimal values and priorities they must hold to lead a creative rather than a destructive life for themselves and for those they influence.

Gantt chart: A chart using timelines and other symbols that illustrates multiple time-based activities or projects on a horizontal timescale. It is also referred to as a bar chart.

Indicators: Leadership/management practices, behaviours, management style, policies and procedures.

ISO: "ISO" or "iso" is the official short name for the International Organisation for Standardisation, which defines world-wide benchmarks for quality assurance commonly known as ISO standards.

Kick-off: "Kick-off" is the term used to formally signify the start of a project.

Milestone: A significant event signalling the completion of a phase of a project.

Measure: A means of determining the success of any project outcome. A measure of success could be on-time delivery.

Outcome: A result or consequence of something.

Reflexivity: Self-criticism and being alert to the human subjectivity process when undertaking research. Awareness that knowledge is relative to perspective

Project Aim: The project aim is the main objective/reason for undertaking the project.

Project Objective: The outcome required, in the following terms:

- Specific;
- Measurable;
- Achievable;
- Realistic and Related; and
- Time bound.

Project Plan: The project plan may be a single document, which integrates all the requirements of the functions of project management.

Project Scope: Project scope involves the standards, parameters and product or process specifications or criteria which apply to the project. It is a combination of the end products of the project and the work required producing them. Scope management involves the initial justification of the project and the start-up, as well as the ongoing definition of deliverables, objectives and constraints.

Qualitative research: This type of research is concerned with collecting and analysing information in as many, chiefly non-numeric forms, as possible.

It tends to focus on exploring, in as much detail as possible, a smaller number of instances or examples which are seen as being interesting or illuminating, and achieve “depth” rather than “breadth”.

Phenomenology: Phenomenology is a theoretical point of view that advocates the study of direct experience taken at face value: and one which sees behaviour as determined by the phenomena of experience rather than by external, objective and physically described reality (English and English, 1958: 387).

Presentation of Data: The presentation of data in the final report should be carefully considered so that it clearly shows the results and highlights the key features e.g. patterns or trends which the researcher deems significant. Data should be considered critically to seek a possible explanation for variations, patterns, correlations, etc. The data presented in the main body of the project will be that which most clearly “fits” with the researcher’s discussion of the research aims and objectives.

Questionnaires: One of the most widely used data collection techniques in work-based research. It dominates the survey approach, but is also often a feature of action research. The aim is to devise precise written questions for answer by a predetermined group or sample.

Reliability: Being able to gain consistent results from the application of the same research methods.

Research Statement: A research statement sets the initial boundaries for the proposed research. To produce a research statement, the following questions should be answered:

1. What is the general area of the proposed research?
2. What is to be investigated?
3. Who or what is the focus?
4. Where is the investigation to be undertaken?
5. To what period of time does your research apply?
6. Why is the research significant and to whom?
7. What is the general area of the proposed research?
8. What is to be investigated?
9. Who or what is the focus?
10. Where is the investigation to be undertaken?
11. To what period of time does your research apply?
12. Why is the research significant and to whom? To the coaching community at large.

Resources: People, money, machines, methods, materials and time.

Sampling: Sampling means the selection of sufficient numbers of people to target in the population of interest. It helps to ensure that there are a sufficient number in categories or variables of specific interest.

Scope: The standards, parameters and product or process specifications or criteria that apply to the project. It is a combination of the end-products of the project and the work required to produce them. Scope management involves the initial justification of the project and start-up, as well as the ongoing definition of deliverables, objectives and constraints.

Stakeholder: People on whom a specific project will have a major influence or who have a major interest in the project. They may be from within the project, other projects affected, or the client organisation; they may be the clients or customers, professional institutions or public organisations. They may provide direction, influence and assistance to support the project.

Time Management: Management of project time relates to the activities associated with development, analysis and control of project schedules. Meeting project objectives within the identified time-frame is a critical factor in determining project success, along with cost and quality.

Validity: Measuring or investigating what was intended to be researched, by asking the appropriate research questions and using legitimate methods to obtain information which is analysed to lead to logical conclusions and recommendations.