Team Coaching Case Study

ORSC World Work Project

Lessons learned from a five month coaching engagement with a small team of leaders in a not-for-profit organization.

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Executive Summary

This is a case study of a team coaching engagement and is written with the new systems coach in mind. It spans the entire engagement, from proposal, client enrollment, initial client meeting, the contract and agreement, the coaching workshops, and client feedback, testimonials and referrals. Additionally, it examines our assessment of the client at each phase of the engagement, the rationale for our coaching plans and timelines, as well as the relationship system of the co-coaches. Since we were also new systems coaches, we experimented every step of the way, and a very important part of this case study is our "Lessons Learned". What also may be of interest to the reader is that we combined our team coaching with a formal Culture Survey from The Leadership Circle - an excellent assessment tool, although we feel, upon reflection, that we did not leverage its power fully in this engagement.

The client is a 4-person leadership team of a small not-for-profit organization. Their stated need was to strengthen their leadership team and to "get out of crisis mode". They were tired and unable to be proactive about their mission. They were always fighting for their organization's survival, working long hours, struggling to meet deadlines and under constant pressure – common issues in not-for-profit organizations.

Our client meetings were all held in person, over a five month period. We booked 3 full-day off-site workshops and 2 90-minute workshops at their office. The off-site location was an elegant boardroom in a modern office tower and helped to create the space for slowing down, letting go of the crisis of the day. It also gave the client a sense of being valued and that it was important to spend time on themselves, as a team.

In between these meetings, we spent a lot of time communicating with them to sort out contract questions and meeting logistics. My co-coach, Andrea Griggs and I spent many, many hours talking (via phone and in person) about our assessment of the team, our workshop timelines, and our own relationship.

An unexpected event took place which prevented us from holding the final, completion workshop. Although it did trigger some disappointment and self-doubt, it also provided extremely valuable learning.

These are my "top 6" Lessons Learned from this engagement. If you are hungry for more "meat on the bones" of these lessons, I invite you to read the full case!

1. Invest in your co-coaching relationship system: everything about your relationship impacts the client system

2. Pay attention to parallel processes – it makes coaching easier
3. The power of Metaskills
4. Invest in the Third Entity: help the client see and appreciate theirs so that they can lean into it to resolve conflict and make important decisions
5. Coaches' judgment gets in the way of fearlessly revealing their system
6. The DPA is always at work, even as early as the criteria for selecting a client (we are designing our dream client), and in the contract. Be aware of it!

Although I have no doubt that with more experience under my belt, I will look back at this case study and my lessons learned from a completely different perspective, I hope that there is value in this "new systems coach" lens for you, the reader. Perhaps it will even be of value to ORSC Certification leaders and supervisors to "remember" their early coaching experiences, to meet their students "where they are at", and create even richer learning for them.

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Introduction

The purpose of this project is to harvest and to share my learning as a systems coach by reviewing a specific client engagement: what we as coaches did, why we did it, the impact on the client, and what we learned. Every coaching plan was developed from our assessment of the client at that stage and, as new systems coaches, we weren't always certain of our assessments, and even less certain sometimes of our chosen coaching plan. So it serves us to take a closer look at this coaching engagement, so that we can become even more effective with future engagements. It is also written for coaches who are embarking on their first team coaching experience, to serve as food for thought and to heighten their self-awareness as a coaching system throughout the client engagement.

I was invited by a colleague, Andrea Griggs, to co-coach a not-for-profit client on a pro-bono basis. My co-coach is a CPCC, is certified in The Leadership Circle tool, and had begun her ORSC journey, but not yet completed all 5 workshops. She was looking to work with an ORSC certified (or in-certification) coach and this pro-bono gig was to be her entry point into team coaching. The opportunity excited me for a number of reasons: the opportunity to work with a new colleague; the opportunity to work in the not-for-profit sector (I have no experience coaching there); an opportunity to coach and witness a team's development over 4 months; the chance to get more certification coaching hours; and lastly, but very importantly, the opportunity to learn more about The Leadership Circle tool, especially the Culture Survey, as I have been curious about it for some time, and curious to see how an assessment tool would be used in a coaching engagement. We felt our skills and motivations complemented each other's well.

Finding the Client

Andrea has worked in the NFP sector, specifically teaching English-as-a-second-language (ESL) and coaching immigrants, for many years. She created a letter of invitation to a handful of NFP organizations, offering pro bono coaching services that we valued at $8,400 (our NFP rate), for 1 client who met her criteria:

- The organization is dedicated to supporting immigrant needs
- The leadership team is the client
- The Board of Directors, the Staff and the Leadership Team agree to participate in the Culture survey
- The organization pays for the survey, at the NFP rate
- The leadership team needs development and support to become more effective

2 prospects expressed interest. Andrea interviewed them both over the phone and selected our client. (The other candidate was a team of only 2 members, which didn't meet Andrea's criteria).

Our client was a leadership team of 4 women in a small NFP focused on helping immigrants to Canada get the basic skills to find a job in Toronto. The team consists of the Exec. Director, a Financial manager (with no direct reports); a Practice Manager (with 3 direct reports), whose program is responsible for 50% of the organization's funding; and a Training Services Manager (with no direct reports). There are only 15 paid staff members in this lean organization (some on a part-time basis), and a handful of student interns and volunteers on part-time and short-term bases. They have a few training programs and most of the funding comes from the various levels of government. The Board of Directors positions are all volunteer positions. They serve over 1,500 immigrant clients per year.

During the initial interview, my colleague learned about the organization and what they hoped to gain from coaching. She discovered that they were almost desperate for leadership development, but they have lacked funding for this. Also, that the Board of Directors has been giving them new metrics to track and achieve, adding to their need to change and adapt to new expectations.

Lesson learned:

Even if we are not charging for our services, it still makes sense to articulate our criteria for working with a client. This screening/interview process invites the client to become clearer about why they want the coaching, and likely more confident that our coaching services will be valuable even if they are 'free'. The coaching alliance starts to take shape at this point and the client begins to "enroll themselves".

The Contract:

Despite being a pro bono engagement, we created a contract to set out what each party would deliver and under what conditions and describing the following:

- Potential Benefits/Outcomes of Team Coaching
- The Work plan (how we approach the coaching, using TLC Culture Survey)
- Timeline for the survey administration and for the coaching sessions (see "proposal" below)
- Agreements
    - Confidentiality, "no secrets" within team
    - The client's costs for TLC, and miscellaneous costs

    - Penalties for late rescheduling/cancellation
    - Client's responsibilities with respect to feedback, references, testimonials
    - Client's responsibility to provide room and facilities for each workshop
    - Notice required for ending the contract early
- Costs and payment deadline for the survey
- Costs for coach expenses (parking, photocopying, etc) to be reimbursed by client
- Coaches' Bios

Lessons Learned:

1. *This contract gave our pro bono work the seriousness it required from the client. They were diligent about scheduling workshop dates with enough notice and in securing excellent facilities for our meetings. It has served us well.*

2. *The topic we should have included in our contract, and which would have strengthened our coaching relationship and our work together, is the idea that serious work takes place in between the coaching sessions. To have set a requirement for completed homework in between sessions, both in the contract and in our meetings with them, would have set their expectations more completely and held our work together in a more secure container.*

Our Proposal:

Our proposal was to help strengthen the leadership team's effectiveness through:

- Identifying the gap between where they are today and where they'd like to be, using the Leadership Circle Culture Survey tool. The plan was to have 3 groups assess the leadership team, producing 3 separate reports: The board of directors; the staff; and the leadership team themselves
- From the survey results, to develop a coaching plan that would be delivered through the following interventions and timelines:
    - August: full day workshop to review the surveys and identify priorities
    - September: full day team coaching workshop
    - October: 90 minute workshop to track progress and accountability of work items
    - November: full day team coaching workshop
    - December: 90 minute completion workshop and client feedback

Lesson Learned:

1. *As new systems coaches, we were unsure if this amount of coaching and the timeline of 4-5 months would be appropriate. We only knew that we wanted to have enough coaching time to be able to witness client progress, yet sensitive to our time and giving it away for free. What we found is that a month between sessions, even full day sessions, seemed like a long time, so we moved the November workshop into late October, and the completion workshop into November. Was this enough coaching time for results to be evident to the client???*

<u>First Client Meeting – Month 1</u>

To protect confidentiality, I will refer to the client team members by their positions, rather than their names: E.D. (exec director), PM (Practice Manager), FM (Finance Manager), and TM (Training Manager).

Coaches' DPA:

In preparation for this meeting, Andrea and I shared our respective goals and outcomes for this engagement, designed our alliance and developed our meeting agenda (and decided who would lead each topic). One area we discussed about our alliance was rank and privilege: I held rank regarding ORSC training; Andrea held rank regarding The Leadership Circle training and immigrant issues and NFP experience. She also had privilege because this client was her client – it was her business development that earned us this opportunity. We agreed to educate each other about our respective training tools as we used them in our engagement, and it was very important to me that Andrea feel secure that I would not undermine her relationship with the client. Additionally, for each meeting topic, one of us was the "lead" and the other was the "supporter". This gave us a guide for how to collaborate without causing confusion with the client.

Agenda – 90 minute meeting:

1. Introductions, create warm and open space; ask about their backgrounds and motivation to join this organization; what are their expectations from this engagement
2. Our approach to team coaching (ORSC) and potential benefits
3. Overall coaching plan
    a. Administer the surveys (1 to board, 1 to staff, 1 to leadership team)
    b. Full day workshop in August – to review survey results and decide on key focus areas for coaching
    c. Full day coaching in September and November
    d. 90 min coaching in October and December to support them in applying their insights in their day-to-day work
4. Assessment and Reveal
    a. Interview to get sense of the team's strengths and challenges (we prepared questions)
5. Expectations and Agreements
    a. Designed Team Alliance (light touch)
    b. Designed Coaching Alliance
        i. Pro bono, but contract – why?

ii. Request for feedback and testimonial and possibly references
iii. What's important to you in your learning process? What supports you?
iv. Confidentiality; no secrets
v. How to be if someone doesn't show up? Rescheduling, etc

6. Action Items
    a. Survey logistics
    b. Contract review/signing
    c. Scheduling dates for workshops
        i. Room/facilities

The meeting and our Team Assessment

We met in PM's small office as the meeting rooms were unavailable. They were undergoing renovations, so there was a lot of chaos and a couple of interruptions from staff.

We struggled to cover this full agenda in 90 minutes, probably because we went into too much detail on each topic, and we needed better time-management (something we struggled with throughout the project!). However, our preparation included getting clear about our goals for the meeting and how we wanted to be together as coaches, and this helped us get critical information from this meeting that we needed to move forward. For example, although we had prepared a number of interview questions to assess their strengths and challenges, in the end, we simply asked them to each find a metaphor that describes their team. When everyone was ready, we asked them to share this. The training manager spoke first that she saw the team on rafts in the rapids; each manager had their own raft and was focused on navigating it safely through the fast-moving water, steering carefully to avoid the many rocks**.** This metaphor generated lots of discussion: are we really on different rafts? Why aren't we on the same raft? What became evident is that a) they don't have a strong sense of being a team and 2) they are so busy focusing on keeping their rafts out of danger, they don't have a sense of where they are going or if it is the best way to get there and 3) they are tired and weary and frustrated by being in crisis mode for so long. We also revealed that we observed them to be very warm, supportive and respectful of one another, with a deep sense of commitment and to, and heart for, the organization's mission; these are strengths that they can draw upon as they evolve. This discussion was a big 'ah-ha' for them and gave them a taste of systems coaching, which they loved. It also established our credibility with them and had them excited for the next steps of our coaching engagement. The other metaphor mentioned was that of a Family – nurturing and supportive but with overworked and stressed parents. Additional observations: ED gets things done by constantly following-up on delegated work, and sometimes losing her temper when deadlines risk being missed or by opting to work late nights to do it herself. She and the Practice Manager were the most vocal and opinionated and were more "equal" in power on the team than the other 2 managers. The Financial Manager was promoted earlier in the year to the leadership team, although she was doing the same accounting job. She was silent unless directly addressed, and even then spoke little almost inaudibly. The Training Manager always looked to the ED for agreement whenever she spoke. All but the ED have been in the organization for between 16-21 years. The ED joined the organization (as ED) 3 years ago.

Lessons learned:

1. *This is a lesson we kept being confronted with in this engagement: do more "right brain" vs. "left brain" work! Minimize the traditional conversations that are analytical, intellectual and rational/deductive. Instead, find exercises that engage the right brain and/or the body, as these get to the heart of things much more quickly and the experience is better remembered! Even in the enrollment or proposal phase – it is important that they get a taste of this type of coaching.*

2. *We also learned that exercises take a lot longer than we think, so we need to build more time into each one. I*

3. *In this first session together as coaches, we discovered that my idea of "break and take" felt more like "rude interruption" to Andrea, and we needed to further design our alliance around this.*

<u>The Leadership Circle Culture Survey</u>

This tool assesses an individual or a team in terms of their Creative vs. Reactive tendencies (vertical axis) as well as their Relationship vs. Task tendencies (horizontal axis), and demonstrates the gaps in where they are today (how they see themselves and are seen by others) compared with where they desire or aspire to be. Creative vs. Reactive refers to the source of their motivation: are they acting out of an inspiring vision or out of a fear? Relationship vs. Task refers to their sense of priority for either Relationships or Tasks. So, in addition to measuring leadership competencies, it reveals inner operating systems, that is, core beliefs and assumptions that get in the way of achieving desired results. We often know what we are supposed to do, but have a hard time making the necessary change. If one is not aware of the underlying issues, all the effort in the world will not create sustainable behaviour change. This tool yields information that generates discussion and useful systems information to help develop a coaching plan. It aligns well with ORSC.

The survey was to be completed over a 5 day period, and this seemed very feasible as there were not that many survey respondents. However, we had to extend the deadline as only 2 of the leaders completed it on time and none of the Board or the staff. When we inquired about why this was so, we were told some people had difficulty answering the questions for the whole leadership Team, including the team itself. What was revealed was that these 4 managers were actually not seen as a Team. This was surprising to the ED and good information for our coaching plan. In the end, the Leadership Team was 100% represented in the survey, but the staff and Board were only about 40% represented.

<u>Lessons learned:</u>

1. *The assessment tool serves as a credible means of getting a view of the system and uncovering some systemic issues early on and is helpful in structuring a conversation to get at their team's development priorities. However, once the coaching begins, the system moves where it needs to move and other than occasionally referring to the survey for validation of our view of the system, we tended to frame our assessment and coaching priorities using their terminology and following their urges/direction. Also, the top priority for our coaching plan was "get out of crisis mode" and we got this loud and clear from our first meeting with them, not from the survey! Andrea and I believe that we did not leverage the tool as well as we could have and we chalk that up to our inexperience.*

2. *Having said this, the simple activity of administering the survey (an email to staff and board from the ED explaining the purpose and urgency) revealed much: the staff did not treat the request with urgency; they only explained their struggle with it when questioned; and they didn't feel enough accountability to have asked for clarification so that they could complete it on time.*

<u>First full-day workshop, Month 2</u>

Desired Outcomes for Client

1. feel positive, hopeful, and to see possibilities - and release negative energy
2. feel aligned, lean into their relationship
3. have sense of themselves as a system, i.e. 3rd Entity
4. feel more spacious - lower stress to hold and process more
5. slow down for sake of being intentional

Objectives

1. to shift their perspective – it is not about the business plan
2. recognize when out of alignment
3. have tools (agreements) to get aligned
4. create a DPA, including hi/lo dream
5. review survey results in spacious vs. particle/data way
6. seek alignment on coaching priorities

Coaches' Third Entity

1. warm
2. open to feedback
3. open to expression
4. productive tension: being vs. doing; moving forward vs. diving deeper
5. perceptive and trusting our observations
6. seeking learning

Coaches' Metaskills

We chose to stand in Deep Democracy and Expert/Professionalism. We wanted to ensure that we heard from all 4 team members even though the ED and PM were more talkative and opinionated. Also, we wanted to be credible and professional so that they felt they were in strong, competent hands (and so that we acted with strength and professionalism!)

Planned Coaching Activities

- Check-in (almost exaggerate need to pause, listen, feel)
- Ice-Breaker exercise: walking/how we move in this room, vs. at office, vs. as a child in a playground; notice energy of each space and then consciously choose energy for today. Re-arrange the room, if necessary, to support this. (Note, they were very receptive and curious about this). (This exercise did help to slow them down and put their daily

business worries aside – we recognized that they were not used to intentionally slowing down).

- General flow and intention for the day: "Today is all about YOUR TEAM. Our intention is for you to see your team with new eyes and greater awareness, for the sake of you being able to choose how you want to be in relationship to each other and with others. Being at choice is a powerful shift from being stuck and overwhelmed."
- Design Team Agreements (a concrete way to be intentional in relationship)
- Design Coaching Agreements
- Explanation of the survey and what it measures
- Review leadership team's self assessment (survey results)
    - High level presentation
    - Time to digest – express feelings using markers and paper, then share with group (right brain – which was a quicker way to reveal these)
    - Normalize reactions, reveal new observations about their Team, help them express what they know about their system from the survey
- **Break**
- Third Entity Exercise – using a key theme from above discussion
- Present data from Board and Staff surveys (digest, discuss, harvest agenda priorities)
- **Lunch Break**
- Constellation Exercise
- Lands Work (each leader occupies own land) using topic from morning's harvest
- Forward the Action (what will you do differently? Accountability, topics for next session)
- Completion

Timeline Adjustments

It was almost lunch time when we completed the Third Entity exercise (the topic was "being in crisis mode"), which was very powerful for them. (They were surprised at what they "knew" when they sat in the Third Entity chair). It was also powerful for us as coaches to witness them feel their Third Entity! We felt that dumping more survey data on them would not be productive at this point, as they needed to be with their own perceptions of their team before looking at themselves through the Board's or Staff's eyes. We also felt the need to create more positivity and possibility in the system, so we revised our timeline and did an exercise which we called "Mining for Gold", which is designed to deepen connection and appreciation. We ran it right after lunch. For this exercise, we put them in pairs and asked them to interview each other to reveal the "gold" of each person – their unique energy and their unique gifts. We suggested these interview questions: What are you most passionate about (or what gets your juices going), and why? What drives you crazy, and why? What makes you feel most alive? In the interview, they were to listen for and sense the person's energy and to describe it using a metaphor, and to identify the unique gifts this person, with this energy, brings to the team. They revealed these 4 metaphors and gifts: ED: Roadrunner – perseverance toward success; attention to detail; TM: Dalai Lama – calm, create community; PM: Giraffe –sees ahead and the big picture and likes to stretch with challenging goals; FM: mythical cat in motion – quietly gets everything done and is reliable. This exercise engaged them fully and created the positive emotional field we needed to tackle the other 2 surveys. It was interesting that they received the Board and Staff results with curiosity, but without much emotional impact – as if the opinions of the board and staff were interesting, but not as important as their view of themselves. They had made a big shift toward focusing on themselves and getting grounded there before dancing to someone else's tune!

The homework they took on from this day was:

1. Create a "client file", with their team being the client
2. Make time for them to be together as a team just to connect and take stock

Lessons Learned:

1. *The Timeline: We were surprised that we couldn't fit more exercises into the day, especially given the small team size. Perhaps with more coaching experience, and more conscious awareness of time during the coaching, we will be better able to maintain a quicker pace, knowing when to allow the conversation to go deeper, and when to harvest a gem or two and move on. Either way, coaches must be prepared to revise the timeline during the workshop, based on the emotional field and the direction of the team's focus. Check in with your co-coach on how you are each feeling and trust that your feelings are information about what is happening in the system. Also, check in with co-coach to ensure a strong connection between both of you – don't wait until the end of the day to raise concerns or issues – the repressed feelings will infect the space! Lastly, if managing time is an issue, then design the timekeeper role into the alliance and timeline.*
2. *Team Agreements: The team seemed to take this topic lightly, as in "we already know and understand all this", and so we didn't dwell on it too long. However, we did have to revisit Team Agreements in each subsequent session, as their agreements were not "alive" and really meaningful for them. Perhaps we could have put greater emphasis on the need for solid agreements up front, and spent longer on them in the first session. For*

example, asking them to describe situations where they did not respect these agreements, to help bring them more to life.

3. *Coach Agreements: It served the team's learning for us as co-coaches to share one or more of our own coaching agreements. For example, one agreement we made was that I would not interrupt Andrea while she was speaking, regardless of how urgent my message ☺. I was only moderately faithful to this agreement in this workshop, and we discussed this privately at breaks, but later in the day we shared this with the team and it had a significant impact on them to appreciate how specific our agreements were and how important it was for us, as leaders, to be conscious, intentional and explicit. It also highlighted the parallel processes between interacting systems. In fact, we used the analogy of Mom & Dad acting as a solid team in front of the children, and how this impacts the family system. Sensing when their parents are not aligned, children mirror this into conflict between themselves and in the system as a whole. Also, how children learn how to deal with conflict from their parents. They all related to this.*
4. *Survey data reveal: In hindsight, we are questioning our decision to jump into coaching before taking the full first day to review the survey results. Although we had lots of information to work from just a high level overview, we could have mined and analyzed the data with them more thoroughly. By this I mean that we could have created experiential exercises to help them feel the impact of the information. The "What If?" exercise in the second workshop (revealing underlying beliefs related to reactive tendencies) perhaps would have been useful in the afternoon of the first workshop. The other potential benefit might be that the client feels the cost of the survey was more justified. Maybe they would be able to refer to the survey in the future had we walked them through it in more detail. We were a little surprised that they didn't seem surprised, nor concerned, about their high "reactive" scores. We now think we should have spent more time in this first session digging beneath the surface of these scores.*
5. *Overall, we needed to spend more time planning how to set the context for each element in our timeline. Crisply articulating the what, why and how of the exercise up front not only saves time, but harnesses their energy vs. allowing it to dissipate as they try to figure it out for themselves.*

Team Assessment Update

- Just beginning to see itself as a team. Its third entity is just coming into awareness. It is: nurturing, committed, responsible, self-sacrificing, open and honest, dysfunctional and going in different directions (this is the team's description of itself).
- It isn't viewed as a team by the staff, nor the Board.

- The ED uses toxic forms of communicating that hinder their leadership effectiveness (especially when under stress). Again, this came out in the survey and we really missed an opportunity to explore the impact of this on the system. It was a bit “hot” for us to handle early in the coaching relationship, and could have had a huge impact on the system to deal with it earlier v.s. later. We discovered much later just how “hot” a topic it was.
- Their mission has changed somewhat in the last couple of years, but they haven’t taken stock of what this means for how they work.
- They are overwhelmed and the team doesn’t know how to slow down to reflect and sense what is needed.
- They don’t take the time to train and develop their staff and end up doing more work as a result, with the staff becoming less accountable.
- The way they operate isn’t sustainable, neither for them personally, nor for the organization.
- The FM is not sure of how/if she belongs on this team and expressed the need for more team time to figure this out.

<u>First full-day workshop, Month 3</u>

Objectives

- Educate about 4 Horsemen and help them get better control under stress
- Continue to reveal their Third Entity, so they can lean into it more for direction
- Champion Deep Democracy – ensure that the FM's voice is heard
- Explore one of the Reactive tendencies (from TLC survey) – get at what belief drives it
- Create more awareness around their energies and intentions, for sake of helping them get out of crisis mode
- Create awareness around the impact of their mission changing without any ceremony or even without consciousness
- Forward the action – get more concrete applications from new insights

Coach Metaskills and DPA

- The only metaskill I recall us adopting was "Lightness/Playful", especially during the Horsemen exercise and to support us having a fun day.
- Our agreements:
    - The following agreements arose from one of our planning meetings when, near the end of it, I trusted my own sense of not feeling tightly connected to Andrea and asked her: "How connected or aligned do you feel to me?" She replied "oh, about a 6". It was an example of naming the elephant in the room, and the steam was released. I think we also shared this with our client in this workshop – again, for giving them permission to fail and recover and to give them an example of how naming the elephant can be of such service to the team.
    - Honour our energy in the moment, without judgment. Trust it is as it is for a reason and be present to it.
    - Do not interrupt each other. If we need to "break and take", then ask for permission.
    - If Peggy breaks the above agreement, Andrea will assume Peggy has forgotten the agreement in the moment, not that Peggy is judging her wrong and has to interrupt her
    - Be both rigorous and transparent about time-keeping (i.e. Announce to the team how long we have allotted to each exercise)
    - Have faith that the client is NCRW and they will get to where they need to get to
    - Be authentic to create the space for the client to be authentic

    - Hold the tension between BEING and DOING – ensure we have enough time for concrete decisions and planning at the end of the day

Coaching Activities

- Check-in – role model becoming present, and intentionality about creating space for work
- Check-in on the Third Entity
    - Create flipchart with names of team members in each of 4 corners, and a big, blobby circle inside, with the heading "Third Entity". We captured what we know so far about the third entity, and invited them to add to it as they became more aware of aspects of it.
- Created a Flipchart with the heading "Application Ideas" – to capture ideas about how new insights from the exercises we were going to do could possibly be applied to their work; also us to keep moving with the exercise without having to discuss the idea fully (save that for later).
- Review Agenda
- Review and commit to Team Agreements
    - Remind them of power of intentionality in relationships
- The 4 Horsemen
    - Explain what they are (they related to them!)
    - Unfolding exercise in pairs (Andrea unfolds for 2 people; Peggy for other 2). Purpose was to create increased awareness about how it is triggered and what happens in their body. Also, how it relates to the team's Reactive scores in TLC culture survey. The E.D. had a powerful metaphor of the Incredible Hulk that created a lot of awareness for her.
- LUNCH
- "What if?" Exercise (borrowed from The Leadership Circle)
    - What are the underlying limiting beliefs in "reactive" behaviour (as defined by The Leadership Circle Culture survey: complying, controlling or protecting)
    - Worked in pairs, each coach with 2 clients, coaching 1 at a time
    - Client describes a relationship at work where one of the reactive tendencies shows up and coach continuously asks "and what if that were true, then what?" to whatever the client responds. The underlying beliefs about themselves in relationship become revealed (e.g.: it is all up to me to make it work; if the other does X, then I am a failure and worthless, etc). We label these beliefs/assumptions "Illusions", then ask client how they would like it to be in their relationships, and then what is needed for this to happen (usually, a shift in

perspective/belief shifts everything). The ED and PM worked on an issue in their own relationship for this exercise and they had an important breakthrough, which turned out to be one of the most positive impacts of the coaching engagement, as per feedback from the ED.

- BREAK
- Myth Change Exercise
    - Purpose to help them honour their mission change and grieve whatever loss and impact it has had on them in order to move forward with more consciousness and commitment
        - We didn't have time for this exercise either!! We wanted to be sure to have time to Forward the Actions, so skipped this exercise.
- Forward the Action – Application Ideas
    - Throughout the day there were ideas about how to apply the insights and what steps needed to be taken in their organization which were captured on flipcharts. We grouped the ideas into a few categories and then asked them to each indicate their top 3 priorities: 1. creating a monthly plan that the team works from; 2. find more opportunities to give praise and acknowledgment to the staff; 3. learn ways to communicate with each other more effectively). For each of these priorities, they identified and committed to taking at least one concrete step toward addressing them. This made up the "homework" we assigned to them, to be completed by the next coaching session.
- Wrap-Up and Close
    - Third Entity Appreciation Exercise: we put the Third Entity flipchart (with the qualities and wisdom they had been capturing on it throughout the day) in the middle of the team and asked them to speak to what this Third Entity has to be appreciated and strengths it has to be leveraged
    - Completion Circle: what new and important insight are they taking from the day? Coaches acknowledge the leaders for their courage, honesty and commitment.

Lessons Learned:

1. *This workshop day was more tiring than the first and I think we had them in consensus reality and in their heads a little too much, especially in the final "Application Ideas" discussion. As coaches we worried that we needed more concrete decisions/agreements to be made by the team for them to sense "real" progress, but energetically, we may have overcompensated. Or perhaps we did make the right decision and this short-term*

"pain' may have longer term benefits that we can't yet see ("who knows what is good and what is bad?"!!)

2. *We realized at the end of the day that we hadn't been revealing the system to itself regularly, nor articulating the emotional field very often. This likely is a key reason the day felt long, heady, and more tiring!*
3. *We neglected "Playfulness" – we didn't stay conscious about that Metaskill – yet it could have served us. I ask myself: why couldn't we hold this come-from stance today? Was it because we weren't truly feeling it? We may have thought that it would serve us, but if we were not feeling playful, we can't just "decide to be" playful, without a lot of conscious effort. Might it have served us more to have checked-in with what we were truly feeling and either adopted that feeling/metaskill consciously and intentionally? Or perhaps if that feeling wasn't useful for us, to have tried to "clear" it first?*
4. *The verdict is not clear yet whether the explicit focus we have been making with the team about their Third Entity is valuable and productive. It seems to be a way for them to "lean into" each other as a team more, but time will tell.*
5. *Exercises required more time than we planned, but maybe we just need more practice so we can keep them moving at a faster pace without sacrificing opportunities to delve deeper. Hence we had to forego the Myth Change exercise.*

Team Assessment Update

- The team has a strong desire to change how they operate (crisis mode) but they don't really believe it is possible
- We observed these primary/secondary identities and processes:

PRIMARY	**SECONDARY**
Reactive (as per Culture Survey)	Creative (as per Culture survey)
North American (i.e. Direct) way of communicating	Eastern cultural, traditional, deferential way of communicating
Small family community	Sustainable business
Busy, multi-tasking, DOING	Spacious, BEING
Crisis mode	Plan ahead
Don't trust staff enough to delegate	Take responsibility to develop staff capability

- As coaches, we were excited to have this much information to work with and yet indecisive about which “path” to take…which one first?
- The “All voices are equal” team agreement is not truly practiced. Cultural norms within the team challenge this, especially where the FM and TM are concerned (their voices are not expressed easily). However, the PM and ED managed to clear up a communication blockage between them in the “what if?” exercise and this is a layer in the foundation of “all voices are equal”. Much courage and trust and honesty were required on their parts.
- They are getting a more detailed picture of their Third Entity, but are still aware of its fragility as an effective working system. They are more aware of who they are and also of what they want in their system: to by in sync, see and plan ahead, more acknowledgments, sustainability, more leaning in to each other, more ownership and accountability.

<u>First 90 minute workshop, Month 4</u>

Objectives

- Follow-up on their agreed-to actions from last workshop. Prior to this session, in response to our email with our planned agenda, they let us know that they had not made any progress on these actions, so we wanted to have time to discuss how / to what extent accountability lives in their system. Without accountability, their goal of getting out of crisis mode could not be reached.
- Their email response also informed us that the PM and TM were now only working 3 days per week. We were curious about this major change on their team and how it happened without much discussion – again, an added challenge to reaching their goals.
- Discuss one homework assignment ("All voices are equal": implications of this in a culturally diverse system) – to champion their efforts, identify any new agreements, reinforce the process of LEARNING for their system. Encourage them to continue to experiment, learn, take steps (even small ones) toward the changes they want to make in their system.
- Re-confirm their coaching agenda and priorities to help us with the last full-day workshop timeline.

Metaskills and Coaching Agreements

- The metaskill I adopted was Disturbance as Ally. It served me very well, as I drove to the wrong meeting location and despite lots of evidence that I was in the wrong place, I continued to believe otherwise, until Andrea called me to set me straight! Then, upon leaving the parking lot to drive to the correct location, I realized I was without my wallet and had to find a good Samaritan to pay for my parking. I raced to the meeting place, noticing that my fuel tank was EMPTY!, and then drove into another underground parking lot, which turned out to be full, so needed to reverse up 2 levels in a tight-turned parking lot, drive around looking for a place to park. All this extra time meant that Andrea and I didn't have any time to prepare together just before meeting the client – we arrived just in time, and I was full of self-doubt and stressed! But leaning into the Disturbance as Ally made me relax, smile and become very curious about what new insights might be revealed in the chaos! Andrea had also been dealing with challenges with her house and racing to arrive on time, and her metaskill was something like "good enough". What was surprising was how these mirrored somewhat what was happening in our client system, and how our revealing our metaskills (and reasons for them) to them actually shifted the emotional field almost instantly.

- My delayed arrival to the coaching session meant Andrea and I did not have time to discuss our agreements, but there was something implicit about acknowledging the chaotic, out-of-control space we were both living in, and feeling compassion for each other.

Coaching Activities

- Check-in: close eyes, breathe deeply. What colour are you right now?
    - The ED and PM were both red, indicating high stress. The TM was orange, indicating moderate stress, and the FM was yellow, indicating optimism and low stress.
- Homework Process follow-up:
    - Before reviewing homework content, let's review the process your team went through: What happened after typing up the notes of the last workshop? What did you do? What happened? Who were you being? Is this typical?
    - Review Stephen Covey's 4 Quadrants (urgent/important axes): What do you know from this perspective?

Not Urgent + Important	Urgent and Important
Not Urgent + Not Important	Urgent and Not Important

    - We revealed to them that there was a voice of "victim" in their system – the circumstances they were in prevented them from feeling in control and it felt hopeless. Revealing this had an impact on them and there was a little bit of "trying harder" to find a solution, when it occurred to me that the voice of "victim" may also have a positive value – perhaps the voice of reality. So I reframed it using a bridge analogy to say that what I am hearing is that the bridge structures are not strong enough to support the traffic and that the voice of "this is just how it is" may be telling you to look at your infrastructure realistically – are the right roles assigned to the right people? Do they need to revisit their mission and funding model?
- Homework Content:
    - What items turned out to be important? What did you learn? How does this work impact your team?
    - The ED and PM completed their homework assignment, which involved the ED having a conversation with one of the PM's staff about her (the ED's) communication style and her intent. This strengthened the bond between the PM and ED, so was very positive.

- The TM and FM were supposed to investigate and collaborate on the topic of "All voices are equal" and how cultural diversity impacts this agreement. The TM, now only working 3 days per week, did not have any time for this assignment. The FM took it upon herself to research the topic online and created a flipchart presentation full of information about power distribution, communication styles and east vs. west cultures. We only spent a few minutes on it, but the team was impressed by this effort and contribution by the quietest and newest team member and they acknowledged her "just get it done, quietly" way of operating. We agreed to pick up this topic in more detail in our next workshop.
- Coaching Priorities – Constellation: Andrea and I had identified the following 8 priorities from our discussions with them, and given our coaching contract was two-thirds completed, we wanted to ensure we were spending time on the topics that mattered most to them. We did a quick "vote-with-your-feet" constellation exercise on each of these topics – simply to get a sense of the top 1 or 2 to focus on next. (Another way we had thought of doing this was to give each of them these 3 coins: quarter, dime, nickel – representing High, Medium, Low priority, respectively. And for each topic they would vote with their money). There was consensus on the top 3 priorities:
    - Get out of Crisis Mode (#1)
    - Develop ourselves (#2)
    - Plan for succession of the leadership team (#3)
    - Operate more business-like, and less family-like
    - Become and be seen as a Team
    - Improve our communication style
    - Enable/develop our staff
    - Get clarity on our mission
- Close: What colour represents you now, and what has changed? The "reds" were now "yellow", as they felt lighter, and more possibility. The orange became a lighter orange, and the yellow (the FM) was still a yellow, but seemed lighter by witnessing the 2 'reds' become less stressed. We acknowledged them for making time for themselves despite feeling trapped in their challenges and chaos.

Lessons Learned:

1. *My biggest lesson was about the power of Metaskills – and the impact we have when we are truly conscious and intentional. I had a heightened awareness about how out-of-*

sync I was in the universe and an intention to be curious, open and for this way of being to serve our work in some way, as opposed to resisting it; and this really helped create the space we needed.

2. *This also heightened our awareness of parallel processes – how the chaos and "out of sync" process in our co-coaching system was mirrored in the client's system. We mentioned this briefly to the client, but perhaps they would have been served by more discussion about this – perhaps the same process was taking place in their organization, or in their community system? Viewing processes in this systems way actually allows the system the space to reflect and breathe in the face of stress.*
3. *Again, we had time challenges – dwelling too long on some topics and leaving insufficient time for others. Consequently, our constellation exercise was very brief, without the time to inquire about what their voting positions meant, and to ensure all voices were truly heard.*

4. *Another lesson for us was how each of our observations about what was going on in their system (I observed "helpless victim" and Andrea observed ambivalence and the system wanting to change) had a powerful impact on the team. Furthermore, my non-judgment about my observation allowed me to get curious and it opened up a new perspective that was more empowering (i.e. "victim" became "voice of reality about workload" which inspired the bridge metaphor). I think this lesson helped us really lean into revealing more in our last full day session.*

Team Assessment Update

- Rank is very powerful in this system and they don't have clarity about this yet
- Everyone has a piece of the 'truth'
- The team doesn't know how to engage the FM (newest member of the team)
- There are role issues: not all key roles are occupied, or they are poorly occupied (e.g. Working only 3 days/week)
- The team is suffering from fatigue and could be near breaking point. We were surprised at the high priority they assigned "Succession Planning", and we think it reflects how tired and helpless they are feeling.
- It also feels that they have moved from unconscious incompetence to conscious incompetence and this is a bit of a dark place, but also a tipping point – we want to champion them to continue and not give up on this journey. Interestingly, the ED had

expressed in our very first meeting that she was too old to change her ways – she is who she is. However, in some ways she has had the most “ah-ha” moments and has been experimenting between sessions on new ways of being. She has been modeling the way for the rest of the team, being actually very open and curious.

- Their individual “metaphor energies” (i.e. Roadrunner, Dalai Lama, etc) are becoming more and more evident to themselves.

- Near the end of the session, the ED asked if we could observe them discussing an issue as a team and give them some feedback on how effectively they communicate and deal with challenges. Andrea and I discussed it later, and then informed them via email of our agenda for the next workshop, which would include time for this requested item. We sensed with the ED some anxiety about the coaching sessions coming to an end while the team still felt stuck in crisis mode.

<u>Third full-day workshop, late Month 4</u>

Objectives

- Follow-up on the "all voices are equal" homework to help create greater understanding about their team's needs regarding this agreement. This will also serve them in their relationships with their staff and clients.
- Do <u>a lot more</u> articulating of the emotional field and revealing the system to itself! They are hungry to see themselves more clearly.
- Help them leverage their Team Agreements and their unique energies and voices to tackle issues.
- Have them feel more "competent"!

Coach Metaskills and DPA

- I don't recall my metaskill, but I do recall that Andrea's was "Its good enough" and this was in reference to my anxiety about continuing to interrupt her during the workshop. Andrea adopted the perspective that if she believed I was making an effort to not interrupt, then that would be 'good enough' for her to not be upset or to doubt herself. This helped me to relax a lot and to even catch myself in the act of interrupting (I was more forgiving of myself, so was more present somehow).

Coaching Activities

- Check-in: using Weather Metaphor to describe current emotional, physical, mental states. We also discussed why the 'check-in' is important to start real and important conversations, and that a metaphor can yield more authentic information than just describing how we feel. 2 were feeling very grey and dreary; 1 was seeing the grayness and rain, but in the context of a beautiful natural environment; 1 was seeing sun with partial cloudiness.
- Team Agreements: we reviewed them and asked if there was anything new to add/change. We invited them to think back over the last week: where did these agreements serve you or where might they have served you, had you remembered them? We once again shared one of our own co-coach agreements (that Andrea has full permission to request a time-out if I interrupt her). This revealing of my own struggle to honour our agreements reinforced the learning process and the "permission to fail" agreement it supports, and also injected some lightness into the space!

- Lands Work Exercise: We created an EAST LAND, a WEST LAND, and OUR LAND. The topic was "All Voices are Equal". We assigned the FM and TM to the EAST land, and the ED and PM to the WEST land. We told them that they do not need to represent the "typical east or west" land, but their own culture within those lands. (For example, the PM is actually not a westerner but has adopted many western ways of communicating, so we asked her to represent her own ways). This exercise yielded a lot of information:

- The challenge of being from "east" and working in "west" culture is that the "westerner" will view "easterner" as less capable and less valuable because they are not assertive or don't contribute ideas and opinions. But if they were to be more assertive, they would experience a sense of loss or confusion about who they are, as they would actually feel they are being aggressive, which is a negative quality. However, if they are explicitly invited to express their views, they can more easily do so.

What the "west" culture values about the "east" culture and would like to import into "OUR Land":

- The clarity about roles and expectations. In the west, there is openness, but sometimes confusion or conflicting messages about expressing one's voice.
- Structures. There seem to be more structures that guide people.
- Respect for seniors, whether we believe them to be correct or not in their decisions

What the "east" culture values about the "west" culture and would like to import into "OUR Land":

- More communications overall between colleagues and superiors
- Empowerment of women

"OUR LAND" – What do we want it to have:

- Imports (above) from both lands
- Learning to say 'no' (for "easterners")
- Ask – "how do we want to communicate with each other?"
- Communicate sooner vs. later

Additional revelations by the ED: she feels she actually has one foot in "our land" with the other 3 team members, and the other foot outside, in the "real world", where threats are "big and constant". And that it is her job to bring the realities (i.e. threats) of the outside world into the team/organization. She acknowledged that she always carries the fear of real world upheaval/danger with her. It was noted that this is a heavy burden and that possibly more people in the organization need to have some of the responsibility of reporting from the outside world – although the question of how many are capable of representing the organization effectively was raised. The ED also shared that part of the reason for having one foot in "our land" and the other foot outside is that her relatively short history at WSC (compared with the rest of the Team) makes her feel like the 'new kid', or even the 'step-kid' or 'foster-kid'. Sharing this created greater understanding and awareness on the Team.

- LUNCH

- Third Entity of the Metaphors Exercise, with the topic "get out of crisis mode":

The Purpose: to tap into the team's diversity and unique gifts/ways of seeing and being in the world in order to address the challenge of being in constant crisis mode.

After a short guided meditation to get them relaxed, yet focused, we helped them to connect to each of their respective energies by reading to them what their metaphor energy is about and what its motto is. Then we asked them to tell us what this creature/metaphor knows and/or needs:

Dalai Lama: this metaphor embodies calmness and acceptance of what "is". From this place, the motivation is to create community and warm support in the face of pain/challenge.

- The motto is: *This is how it is and how can I help?*
- What the Dalai Lama knows: there are solutions, but we must be realistic about what is possible; life is always unstable, and we need ways to bring all of our energies together to solve problems. But solutions that drain us of our energy are not good solutions.

Giraffe: this metaphor embodies the ability to see beyond and beneath and is motivated by new challenges and the continuous sense of "possibility".

- The motto is: *There is always a solution.*
- What the giraffe knows: it is possible to reach our goals. We need to focus on just a couple of things and do them well. We should focus on both a short term goal and a long term goal – hold both the short and long-term views in our focus at all times, but be very selective about what we choose to work on. Then let's discuss it thoroughly and take action on it. Trying to do everything at once means we do nothing well.

Cat in Motion: this metaphor embodies the agility and languidness of a cat.

- The motto is: *Just do it and without a fuss or apparent effort.*

- What the cat knows: the facts: revenues are not covering expenses. If we can't find new revenues we have to cut expenses. However, we need more accountability in the organization, and cutting hours has the impact of reducing staff's sense of accountability and possibly the quality of our services.

Roadrunner: this metaphor embodies the sense of urgency and perseverance that is needed to accomplish things.

- The motto is: *Don't stop, run faster, do it all, we must succeed!*
- What the roadrunner knows: the energy of the roadrunner is both positive and negative. The Roadrunner gets things done, but the chaotic nature of that energy also creates stress in the system. We can trick the coyote, but we can never lose him. He is a constant threat. And that one person alone cannot catch/trap him. We need more people to hold the corners of the net down!

We then invited them to take turns sitting in the Third Entity Chair (I stood behind it, while Andrea sat near their semi-circle during the meditation), and to trust that they would know what to say once they sat in the seat.

Third Entity and what it knows and wants:

- More of the staff need to gather data from outside the organization as well as to interact politically on behalf of the organization
- We need to tighten our partnerships with sponsors
- Each person may need to carry more than one role
- We are paralyzed by the situation; we are going in circles, and see no exit.
- Perhaps we are too inward looking and it is draining us; maybe we need help from outside
- We have been under threat for so long that we have come to accept this as business-as-usual.
- We need to see that we have an underlying belief that this crisis mode cannot be changed and it is preventing us from getting out of this mode of operation. What will it take for the alarm bells to be taken seriously by all of us, including the staff? How do we get people to take things seriously?

- Team Discussion and Observations:

Topic: new information from sponsor/funder that WSC needs to demonstrate achievement of employment placement targets to ensure continued/increased funding.

Andrea and I observed the team discuss the topic for about 20 minutes. Then we left them to continue their discussion while we compared notes and discussed our feedback approach, which was to first ask them what they observed, and then to frame some of our observations as questions – to help us stay curious vs. judgmental.

Team observations after the discussion:

- We generate a lot of discussion and ideas, but we never nail them down/take action on them.
- This discussion was pretty typical for us, except that we spent more time than usual on 1 topic. Usually we would discuss many topics in this amount of time.
- PM needs to leverage her experience to help with issues beyond the Practice Firm

Coach Observations:

- Unclear who on the team is accountable for the results/metrics in question – do other key metrics have appropriate owners? If ED is the only holder of key operational metrics, then it will be difficult to ensure the staff cares about them on day-to-day basis and they will only react if deadline or crisis.
- Team Agreements that were honoured:
    - Lean into mission. Team does this consistently and naturally and as a result, the team is not plagued by competitiveness. Everyone is willing to discuss any issue that impacts the overall mission.
    - Open and honest – no horsemen at work!
    - If something is hard/difficult – name it
- Team Agreements that need more focus/practice
    - "If something is going well – celebrate it!" We noticed that although there was very positive sponsor feedback, it was 'stepped over' or downplayed by the threat of not making targets. True acknowledgement of successes puts 'deposits' in the organization/team's energy and confidence bank, which you can then draw upon to deal with challenges and issues. Downplaying the successes by lumping them in with "BUT we are in danger!" may cancel out this benefit.
    - "All voices are equal". We observed that a lot of the dialogue was between ED and PM with TM providing factual information as needed. From the LANDS WORK exercise in the morning, it is clear that for TM and FM's opinions to be expressed, they need to have a specific request/invitation to do so, and to speak from the position/capacity of manager or teacher or expert. This is a new practice for the team that helps the agreement "all voices are equal" come to life in the Team. Although FM has no direct involvement or experience with this

particular issue, she seems to benefit from listening in, as her finance role benefits greatly from understanding the organization's challenges.

    - "Advance notice and preparation": since the team wasn't aware in advance of the meeting that the topic was TRAINING RESULTS (and of course, this topic was decided only at the last minute in this case), the team cannot prepare in advance by researching, gathering data, consulting with staff, etc, which could help to make the discussion shorter and more effective. A good practice is to give enough notice of the meeting and the topic and problem /opportunity statement, with clarity of expectations (i.e.: please bring data, ideas, recommendations related to it). The team's own observation that they also need to agree on next steps/actions with deadlines is excellent.
    - The information was presented in a "five-alarm bell" manner. For some people, the way the information is presented may affect the degree to which they're effectively able to deal with the issue.

- There were a few actions from the team discussion on Results (TM to do some research; PM to investigate Job Developer role in Training dept; ED to speak with a staff member re: monthly targets, adding TM to a report, etc)
- New Team Agreement to add: Every meeting must have time to document 'what, who, when' of agreed-to actions from the discussion: "What did we decide? Who owns it? By when?"
- FM was asked to play what the ED called the "Third Entity role" at each Team meeting: i.e.: 10 minutes before the end of the meeting, FM will stop the discussion and ask: what have we decided? Who owns the task? When will it be completed? FM might also act as the keeper of the other team agreements.
- Try to have only 1 topic (or at least, very few topics) at each meeting
- Meet before everyone goes off on vacation, either for lunch or coffee

<u>Insights from the day and Completion:</u>

We asked the team members: What was your most impactful insight from the day?

- PM – the role I can play to help our meetings be more effective
- TM – it is good to hear that my voice is needed and that I have permission to speak out
- FM – sharing ideas was valuable and hope things will improve
- ED – I feel a little more of a shift of the responsibility from my shoulders to the Third Entity; the visual metaphor of the roadrunner holding down the 4 corners of the net over the coyote is a very powerful reminder for me to lean into the Third Entity

more….and…that I may need to explain to the team/staff “how” to hold down their corners.

What is your weather pattern now? (all were milder/sunnier!)

Lessons Learned:

1. *The more we reveal the system to itself and articulate the emotional field, the more the system is able to be present and sense all that is possible to sense (they see more clearly and have more information to work with!). This always has to be our coaching priority (and we think we did this reasonably well today)! And, it definitely helped to have built it into our DPA as a reminder.*

2. *For each coaching activity, one coach had the role to lead it, while the other supported it (revealing the system, articulating the emotional field along the way, helping the other coach as required) and played the role of Time Keeper to ensure we would respect our timeline, or consciously decide to forgo it. This division of labour served us well, as we do not naturally pay attention to all these functions simultaneously. It seems to become easier with practice!*

3. *Andrea and I were nervous about accommodating their request to observe them actively discussing an issue and to give them useful feedback. This was new to us, and we worried about our ability to stay focused on the system vs. the individual behaviour. (This was a recurring theme for us – to hear the individual voice as truly a voice in the system, and to frame our observation as an observation of the system, as in “this is a team where it is OK to yell (or always check in with the ED, etc) – how does that impact your team?) However, taking the 5 minutes to privately compare notes and design how we would give our feedback was very helpful and we were delighted that we did this well and they didn’t feel judged in any way. In fact, we did get feedback that seeing themselves through our eyes was very helpful to them. I also think this exercise served to bring their team agreements to life for them, because we shared our observations about how they honored or stepped over them. Now they see their team agreements as a tool they can lean on when the coaches are not around to support them. Furthermore, the PM has begun to use this tool with her direct reports.*

4. *There was a point during the Lands Exercise where Andrea was not present – I think because I was doing a lot of talking and she lost her momentum or ‘place’, but once I noticed this and made an effort to turn it back to her, she became present again. So there is something about the coaches feeling very connected at all times that is critical.*

Also that in that moment of awareness of disconnect, we both leaned into our DPA to reconnect. It is a reminder that making relationship agreements really work is challenging and can take time and practice!

5. *This lesson is one I am still learning about, and was brought to my attention by 2 of the reviewers of this case study. They observed that I judged myself wrong in "interrupting" Andrea during the coaching sessions and that from the place of feeling "wrong", I was unable to lean into our relationship. Our Third Entity included both of our ways of being (my need to blurt my mental ah-ha's and to sometimes process out loud and Andrea's way of thinking before speaking). To shut down or make less important my style and needs is essentially disempowering a part of our Third Entity. Instead, what could we create from the place of embracing all aspects of our Third Entity? This idea stimulates more questions and insights for me: Was this a parallel process between our coaching system and the client's system? Were we struggling with "all voices are equal" too? Perhaps so, and this may have crippled our ability to help the client fully own this in their own system. I expect that awareness of our own system struggle would have opened the space for us to reveal the same process in their system – or to ask the question: where in your system does this happen?*

6. *Did you notice that there were no timeline adjustments made? We are pleased that our time management (both in the plan and the execution) improved!*

Team Assessment Update

- The team has moved from conscious incompetence to conscious competence on some things, such as: their Team Agreements; the need to examine role assignment in the organization and their team.
- We believe that FM now has a firm sense of belonging on this leadership team – this is huge for her as well as the Team.
- Despite ED's claim in our first meeting that at her age, she's not going to change herself, we observe her experimenting with new ways of being. She seems very aware of how a small change in her approach and perspective can have a dramatic impact on the system. Yeah, ED!

<u>Final Workshop – 90 minutes, Month 5</u>

Objectives

1. Remind them of who they were in July and who they have become, as a Team through the coaching journey – lots of acknowledgment!
2. Create a sense of optimism and possibility about what they can accomplish going forward – lots of championing!
3. Present a high-level proposal for another (paid!) coaching engagement that will address areas we didn't work on in this engagement. About mid-way through the engagement, we documented the client's agenda and our coaching activities in a spreadsheet (see Attachment A, at the end of this document). Our plan was to present this as a review of our journey and where we need to focus next, should a new coaching contract be signed.
4. Obtain feedback from them about this completed engagement, for the sake of our learning (part of our contract).
5. Obtain customer references and testimonials for our future marketing initiatives (part of our contract).

Coach Metaskills and DPA

Metaskills: "celebration", "acknowledgment" and "respect".

We decided to seek expert advice, and Kathy Hay, an ORSC Supervisor, generously gave us her time and the benefit of her coaching skill and experience. She directed us to review our experience with this client through these lenses:

- Metaskills: She reminded us of how metaskills cast spells on the emotional field and that the greater our awareness of our own emotional field, the stronger a spell we can cast – that is, that our intentionality becomes more powerful, more directed and specific.
- parallel processes: how was what was happening in our own relationship system being mirrored and impacting the client's system?

- Primary/Secondary identities and processes, leveraging the results of the Leadership Circle Culture survey. She pointed out how our client's value around "doing" and task orientation was their primary process, which challenged them to stop and appreciate and celebrate and to just "be". A steady diet of tasks without fun was draining their energy and spiraling them further into "crisis mode". Our job as coaches was to teach them to have more fun. However, at one point in the engagement, Andrea and I became "enrolled" in their value of accomplishing tasks and spent the better part of a workshop sifting through action ideas – that was the workshop that, in hindsight, had the least juice for them. She cautioned us on the use of our attached spreadsheet which captured their priorities/agenda, and our coaching activities as it plays right into their habit of making lists of things to do!! In fact, she wondered if having given them any homework assignments at all was even helpful to them changing their habits. (Although, one homework item that they created for themselves – to create a calendar of important deadlines – seemed to have a lot of positive and practical impact on them.)

Kathy encouraged us to be daring and stretch our comfort zone in this last session – to be playful, to cast a spell of fun – for their sake as a team. So we threw away our spreadsheet (Attachment A) and focused on the telling of OUR STORY…the story of Andrea and Peggy co-coaching this wonderful client, as a way to cast a spell of myth and magic.

We did this for the sake of casting a spell on ourselves first; and also to experience the exercise so we would know better how to instruct the client in telling their story, as well as how much time we might need. We developed the story by one of us starting "Once upon a time there was …" and then the other adding to it, and then back and forth until the end. We also took the story into the future – our vision for ourselves. Our story was awkward at first, but became a fairy tale full of magic. It was very dreamy and essence-y and had the impact of describing the emotional field during our journey, vs. the facts. We hoped the client would allow us to record their story as they tell it and we will leave it with them (once we've harvested some ideas for our testimonials from them) so they can refer to it in the future, when things get difficult.

Our DPA

Kathy Hay also reminded us of our Third Entity – a blend of wisdom of the head (Peggy) and heart (Andrea). We always seek to find each other right and we do have a value around being "perfect". So "permission to fail" is a challenging but important agreement for us.

Proposal for follow-on coaching with this client

We have not yet come to an agreement about what we would quote as our rate for the next coaching engagement. We are aware that this organization has no budget for coaching/consulting services, although Andrea is researching funding sources on their behalf. We will likely charge a total package fee vs. a daily /hourly rate. and it will be for a probably 2 full days of coaching and 3-4 phone coaching sessions of about 90-minutes each. Phone coaching would save Andrea and me about 2 hours each of travel time, per session, so we will pass this time savings on to the client. Also, we view this as an experiment and learning opportunity for us to co-coach via telephone. Finally, we are curious about the effectiveness of more short coaching sessions over full-day sessions. Lots of learning has taken place in the full-day sessions, but the client may also feel more dependent on the coaches for their own development and learning. We expect that focusing more on applying their recent insights in their daily work, and using the calls to keep them accountable may in fact give them the confidence to embark on other changes.

We are also considering offering some individual leadership coaching to the team members. Perhaps if they can't afford the team coaching, we will respond with individual coaching sessions for the ED (to be further discussed with Andrea). Both Andrea and I feel that the ED would greatly benefit from individual coaching and that this benefit would spill over to the organization.

Planned Coaching Activities

- Check In (10 min): close your eyes, breathe deeply…. What genre of movie best represents how you are in the world at this moment (energetically)? I.e. Western, love story, comedy, drama, intrigue, war…?
- Follow-up: (10 min): hear the 2 questions, reflect, and then bottom line it.
    - How have things been different since our last workshop together? What changes have you noticed?
    - How did your planned meeting together go?
- Purpose today (5 min): to reflect, celebrate and gaze into the crystal ball. To tell your team's story of who you were, what you learned and did, and who you've become. And from the new place that you now stand – what's ahead and what's possible? We are also seeking your feedback on the coaching journey we've taken together.

- Hero's Journey and Crystal Ball (30 min): we will ask them if we can record this – we will use recording to create draft testimonials as well as leave them the recording to have "their story" for future reference. If they say 'no', then Andrea and I will try to take a few notes during their story, and take time immediately after the workshop to capture as much as we can remember. Andrea and I will add in our recollections of their journey and successes to help enrich it and jog their memories.

- Proposal for additional coaching: (5 min)
  - Our high-level plan to work with them on remaining coaching priorities.
  - We'll submit the details including costs to ED.

- Feedback Forms: (15 min)
  - The blank form is a separate attachment (Attachment B), for your information

- Appreciation Loop and Closing: (10 min)

- Referrals – separate discussion with team: (15 min):
  - Names of people to contact- email, phone numbers and an introduction. We'd be interested in people from different sectors: not-for-profit, public sector and the private sector.
  - Thinking about the work we've done and our personalities, can you imagine other teams that might benefit from the work we do? You are well-connected to the non-for-profit sector, and connected to some for-profit organizations as well. Who are people who might be interested in hearing about your experiences? Who are people who we might be able to follow up with to arrange a meeting, etc. etc.

<u>…Then the unexpected happened!</u>

Just 2 days before our final workshop with the client, the Executive Director contacted Andrea saying that one of the team (the T.M) had just presented her with a doctor's note recommending an immediate leave of absence from work for health reasons. The E.D. asked if we could postpone the session without penalty (we were within the 72 hour notice allowance) and if not, she would hold the session and bring in a substitute employee for the T.M. Andrea and I decided that we should allow them to postpone without penalty, as this seemed to us to constitute an “emergency”. We tried to follow-up with the ED via email and phone to reschedule. She left another message with Andrea saying that they would not be able to hold the final workshop, as something major has happened in the organization and it wouldn’t be feasible. She alluded to “an employee” filing a complaint against her that might cause the demise of the organization. She suggested we send the feedback survey for the team to complete and return via email. Then the ED went on a 2-week, pre-planned and scheduled, vacation.

This left Andrea and I puzzled, worried about the organization, and disappointed not to be completing the engagement as planned. But our dominant reaction was “what signs along the way did we miss noticing?” and “did our coaching interventions somehow contribute to this turn of events?” We guessed that the TM had filed the complaint, yet this action seemed out of character for her, as she was a very warm-hearted person (our Dalai Lama energy of the team). We really questioned our ability to assess the team.

What we had picked up about this team member along the coaching journey was the following:

- Whenever she spoke, she looked at the ED, as if for validation
- She was the voice of “we can’t take on any more work”
- The role of TM was poorly occupied. That is, the TM role was a full-time leadership role, yet she only worked part-time, and was clearly tired and looking to reduce her working hours even further. The key measurements for this area of the mission were not clear, and she didn’t have clear accountability for them. She seemed to be responsible more for administrative tasks than strategic tasks. Andrea and I brought this to the team’s attention in the last workshop when we observed them discussing an issue.

Nevertheless, we did not see signs of possible revenge. We would have guessed that her expression would have been more of a request vs. an accusation.

We decided to contact the P.M. to get some information, as well as to get a sense of how quickly they might be able to return the feedback forms. We asked her to forward the survey to the team member on medical leave, and we asked to set up short phone conversations with each team member to review their feedback and discuss possible referral contacts. The P.M. had no information to share about the issue that had aborted our coaching engagement and we didn’t press her. She did inform us that the FM was in the hospital for surgery. This just added to our sense of this team being “ill” and we were very concerned for them.

In our interview with the ED, a week after her return from vacation, she confirmed our assumption about the source of the complaint, but shared with us that as disappointed as she was in her for taking such damaging action, her main concerns were that the TM get the rest she needed to recover her health and that the organization as a whole find a way to deal with her absence and the delegation of her work. She was as surprised as we were by this formal complaint and felt, as we came to believe, that it was an unskilled expression of a marginalized voice in their system. The ED seemed refreshed from her 2 week vacation, and more philosophical about the formal complaint and less despairing. In fact, she had engaged another employee to step up to some of the TM role responsibilities and felt it would be a good fit. Despite the obvious crisis, the ED seemed optimistic. So, who knows what is good and what is bad??

Lessons Learned:

1. With the benefit of time to reflect, I am now very grateful for this experience with an unexpected and painful turn of events in this system. It reminds me that I am not the creator of the system – I can't make it be what I want it to be. Rather I am (when at my best as a coach) a kind of sacred witness to its evolution, and I am not the judge of what is good or bad for it.

2. I do think also that had we truly not felt any judgment about their system, we would not have marginalized some of the more "negative" signs, and would have revealed them as eagerly as we chose to reveal to them their "positive" behaviours. For example, although we shared our observation about the TM always looking to the ED whenever she spoke, we didn't inquire about it, nor unfold it. Perhaps it would have cleared up some of the rank and power issues between them and made it easier for her to ask the ED for what she needed – directly, without revenge. Part of the challenge we faced at the time was wanting to stay focused on the full team, vs. on a subsystem or the behaviour of one person. In hindsight, we should have framed this behaviour as a voice in the system.

3. On the positive side, our coaching did help TM find her voice, although she expressed it in an "unskilled" way. From her perspective, the ED had been very unskilled in her expression for a long time, and I guess it is no surprise that the TM's expression was a kind of mirror to the ED.

Client Feedback, Testimonials and Referrals

These items were part of our contract with the client. It took several emails and phone calls to get the feedback forms completed and returned and to schedule the follow-up phone interviews. In the end, we interviewed everyone except the Finance Manager (F.M.) as she went into hospital for surgery.

Client Feedback

Attachment B at the end of this document is the feedback form we sent each of the 4 team members. The following summarizes their individual feedback:

PM Feedback:

> Overall, she felt the coaching was a beneficial experience and the team is stronger as a result. She gained the most insight and value from understanding their Third Entity (and the perspective this brings to a problem) and from our observations of them discussing a business topic as a team (revealing some of their "bad habits"). She saw the "bi-polar" identity of the team (her words), gained greater understanding of the diversity of voices, and clarity about job role issues. As a result, she feels she is a better leader, with the ability to speak directly about difficult topics without "ruffling feathers", and to delegate assignments with accountability. She would have liked less visioning exercises, and more sharing about best practices of other teams, and trends in leadership groups. The Leadership Circle survey provided information about their team from others (i.e. Board and Staff) that was useful. Peggy and Andrea complemented each other well. She would recommend coaching to others as it provides the safe environment for guided learning and development, and would like to be able to have coaching follow-up in 6 months' time to ensure lessons learned are applied. Team coaching gives clients insights into the workings of their team, revealing blind spots, and provides the tools to address them. And, it was a lot of fun!

FM Feedback:

> The coaching engagement greatly contributed to her increased confidence as a new manager and to her sense of belonging on the leadership team. Her greatest insights were the Third Entity and Team Agreements – as practical leadership tools. Peggy and Andrea complemented each other well, and have the ability to recognize each individual's strengths and to make them feel comfortable in expressing their voice. The coaching was authentic and credible and she would recommend team coaching to others who want to incorporate new strengths in their teams.

TM Feedback:

> The key challenges we faced were communication (how to ask for what we need) and heavy workload. It remains to be seen if the coaching will have helped this. The coaching was an opportunity to reflect on what is important. It helped me see how burnt out I am and it gave clarity to the team that I am working without support. I was not assertive and it helped me find my own voice and discover what I want to do. I would most certainly recommend coaching to other teams, but urge them not to wait until they are in a crisis. Coaching creates awareness of how to make your work environment more communicative, inclusive, respectful and safe. It supports diversity and leveraging the unique strengths of the team to move forward in a realistic and balanced approach. Team coaching should be part of an organization's leadership development program. Peggy and Andrea have an excellent facilitation style with energy, warmth and the amazing quality of listening and acknowledging each person's point of view. They were well organized, focused and the process is aligned well with the objectives.

ED Feedback:

> Despite the shocking turn of events with the employee complaint against her, the ED felt the coaching had been very beneficial to her as a leader, the team as a whole and the organization. During the coaching, she felt empowered and more secure as a leader. She felt love and caring and an increased sense of being able to lean on each other for support in achieving their common goals. The specific impacts of the coaching have been: the FM's confidence as a leader and valuable member of the team; a ten-fold improvement in her relationship with the PM; the unfortunate outburst of the TM who found her voice (in an unskilled way – a formal complaint); her new ability to listen better and to communicate without blame are contributing to fostering greater trust on the team and reduce stress in the organization; and structures to delegate work along with accountability. Andrea and Peggy are flexible, supportive, intelligent, sensitive, and creative. They were always well prepared with a great "toolbox", yet able to change the plan to meet the needs of the team in the moment. Their teamwork is impressive and was a great model for us. The ED would "most definitely" recommend team coaching to other organizations, as it promotes growth for individuals and teams.

Testimonials

During our 3 feedback follow-up phone calls, we reminded them of their contractual agreement to provide testimonials and referrals, for the sake of us taking our passion for team coaching into other not-for-profit organizations. We offered to draft the testimonials for each of them based on their feedback comments, to save them some time. Andrea and I created 2-4 testimonial statements from each team member (1 to discuss overall coaching impact; 1 regarding Andrea and I as a coaching team; 1 for Andrea's own use; 1 for my own use), and we emailed these drafts and gave them a week to let us know if they wanted to make any changes. The only request for a change was from the ED who asked us not to reveal the organization's challenges, as they feel too vulnerable to make that public.

We also requested that they provide a LinkedIn recommendation for each of us. This has not yet been done, although the ED has committed to completing this asap.

Referrals

We are still waiting for referrals from them. We suggested that they might send an email to their contacts to introduce us and mention their satisfaction with the coaching process. Andrea and I can then follow-up to request a meeting with each one.

Lessons Learned:

1. We are delighted that testimonials and referrals were part of the contract, as it gives us the confidence to request them despite the premature end to our engagement.

2. I am pleased that we drafted the testimonials for their approval rather than wait for them to create them. We are confident we have not misrepresented them, but also feel we have structured the testimonials in the most favourable light for ourselves.

3. We struggled with the Feedback form – there were so many possibilities to inquire about given the many coaching exercises we did with them. In the end, we thought about the testimonials we wanted to create from their feedback, and this helped us limit the survey questions.

Overall Engagement – Lessons Learned:

1. *I was truly amazed at Andrea's ability to pick up ORSC concepts and tools, without having attended the full course series. I was even more amazed by her courage to implement them in the engagement. I know my own confidence would have suffered too greatly – I would have needed to read the material, observed a demonstration, and practiced the skill/tool in a classroom/sandbox setting prior to doing it 'live' with a client! It just occurred to me that maybe her success was partly due to me being a good teacher! ☺ I know I loved sharing my ORSC knowledge with Andrea; and, she is a very quick study. It was also enjoyable for me to learn about The Leadership Circle survey from her. This experience gives me confidence to work with a non-ORSC coach on team coaching engagements, of course, assuming that the coach is receptive to using ORSC with the client.*
2. *Coaching a client for 24 hours over 4 months was a phenomenal learning experience that boosted my confidence as a coach, because I was able to witness the impact of our coaching over time and to get a sense of direction and progress for the coaching. After each session we would do an assessment of the clients' strengths and challenges, which became clearer over time. I recall one morning in October, waking up with the thought in my head "I am an ORSC coach!" (versus: "I am learning to become an ORSC coach"). There is a sense that I have reached an important milestone as a coach and I suddenly felt confident!*
3. *Pay attention to what's going on inside myself and inside my co-coaching system – there is information there that helps understand what is going on within the client system, and perhaps within their broader system. Always be curious about this – articulate it, then get curious! Looking back, I think that when Andrea and I had a strong sense of our own Third Entity, that the team was able to see and lean into theirs. Also, when we notice something about the client's system, we should check-in with ourselves and our co-coaching system to see if we may be holding seeds of the same experience. And if we want to shift the client system, to first ensure our own system has made the shift….and then, to use the metaskills to powerfully shape the space for this shift to happen. Easy to say this in hindsight, but what an important discipline to adopt, as coaches and as leaders!*
4. *The power of the Third Entity – it is more than the sum of the parts, it really is "the next Holon up". This means that it is the force that creates alignment in relationship – or at least, it has the power to do this if we trust it. It is the way out of team issues. It unburdens us of sole responsibility, and calls forth each member in an authentic way to contribute what they uniquely have to offer. It makes life so much easier!! But it takes courage to lean into it, to let go of our isolation and our illusion of control. Also, name the qualities that belong to the Third Entity WITHOUT JUDGMENT. If the characteristic lives in their system, name it. Then*

ask how they can use that characteristic. It gives the system a sense of their diversity and range, as a system.

5. *We didn't use that many ORSC exercises (information constellation; lands work; DPA; unfolding the horsemen; Third Entity;) considering the time we spent with them and I suspect that many other exercises would have been equally or more valuable. Specifically, alignment coaching (perhaps around east/west communications); coaching on Roles (outer role issues – i.e. Unassigned roles; inner role issues, etc). As new systems coaches, it was challenging to carry the full toolkit!*
6. *I think we could have leveraged The Leadership Circle Survey much more in our coaching plan. It would have given the survey more relevance to the client so that they could refer to it long after the coaching engagement ended. The ED did not feel it was a useful investment, and certainly this is due to us not leveraging it more in our coaching exercises. Should they agree to do more coaching with us, Andrea and I will use it more consciously in our coaching plan. Kathy Hay pointed us back to the survey and how much was revealed in it.*
7. *ORSC truisms…are true!*
    - *The system is a 900 lb gorilla and it will move how and when it wants to!*
    - *Who knows what is good and what is bad?*

Special Thanks

To:

Andrea. For being a true partner in this learning journey. Working with you was so easy and enjoyable, even when it got "hard". Your openness to learning was a delight to witness and your integrity inspires me. Thank you also for full support in writing this document and your invaluable memory of the events and editorial suggestions.

Our Client. Thank you for being vulnerable and committed and for trusting the process. We know that your mission will benefit greatly from the subtle yet powerful shifts you have made on this journey, and we thank you for your work in empowering marginalized voices in our community.

Shahmeen Sadiq. For referring Andrea to me as an ORSC coach with interest in The Leadership Circle assessment tools. Shahmeen is a Senior Consultant at The Leadership Circle and generously helped us make sense of the client's Culture Survey results.

Kathy Hay, a senior ORSC coach and certification Supervisor. For sharing your skill, wisdom and precious time with Andrea and me, for the sake of our learning and the sake of our client. We wish we had sought your help earlier in the engagement!

The reviewers of this document, my ORSC certification cohort colleagues, Helena Wheeler, Sylvia Abergil, and Jing Ye. When I couldn't see the forest for the trees, they gave me fresh perspectives on this case study. What I appreciate most from them is their assurances that this case study will serve other coaches, as this was the encouragement I needed to complete it.

The ORSC community, including our Founders, Faith Fuller and Marita Fridjhon. For the wealth of resources available online and just for the asking. We felt held by all the learning and leadership that precedes us.

Attachment A: Team Development Priorities

Team Development Priorities	Why?	Coaching Work	Impact
Get out of crisis mode	work-life balance; enjoyment	creating time/space for focus on the TEAM	creating a plan in Sept; clarity; timely completion of task
	be able to see opportunities and threats	paying attention to what the Team needs first	
	be able to prioritize better		
	become more strategic and proactive		
Become & be seen as a Team	TEAM is source of support and wisdom	Third Entity exercise: team wisdom	greater understanding and trust
	know how to leverage indiv. Skills, passions	TLC Survey - Awareness of Team's reactive vs creative tendencies	
	creates security and confidence in staff/board	"mining for gold" exercise: individual energies, gifts	
	TEAM can accomplish more than sum of individuals	Team Agreements - creating space for real conversation and learning	
Improve our Communications	Fewer "outbursts" = safer learning environment	4 Horsemen exercise	
	Speak the "hard" messages with desired impact	"what if?" exercise on reactive situation	
	Consider cultural differences	Team Agreements (reviewing, revising, adding as situations occur)	

Team Development Priorities	Why?	Coaching Work	Impact
Develop our Staff	Serve the clients better		
- skills, ownership, recognition	Share the workload more effectively		
	Include the wisdom of the staff in strategies		
	Provide more fulfilling work environment		
	Create a learning environment		
	Support getting out of crisis mode		
	Foster sense of ownership and accountability		
Become more business-like vs. family operation	Sustainability, future growth and viability		
	Attract more funding		
Get more clarity on our Mission	Be able to assess new opportunities more readily		
	Streamline activities around mission priorities		
Plan for Leadership Team Succession	Sustainability of the mission/organization		
	Provide TEAM with a back-up plan		
	Provide impetus to staff development plans		

Attachment "B"

Note: To use this form with a client, first insert blank lines to allow room for their feedback.

WSC Leadership Coaching – Feedback

1. What were your biggest insights during this process?
2. How will what you've experienced in the coaching sessions help you at work (i.e., what has been the impact?)
3. What key work challenge did you hope to address through the coaching engagement?)
4. How has the coaching impacted that problem?
5. What is the most important thing people should know about team coaching with Andrea and Peggy?
6. Would you recommend team coaching to other organizations? Why/why not?
7. Describe what insights you gained from the results of the Leadership Circle Culture survey:
8. What has been the impact of this learning for yourself as a leader, and for your team?

Questions about your coaches, Andrea Griggs and Peggy Brown:

Please comment on **Andrea's** facilitation and coaching skills:

1. What worked well?
2. What would you want more or less of (from Andrea as a coach-facilitator)?
3. Any other comments:

Please comment on **Peggy's** facilitation and coaching skills:

1. What worked well?
2. What would you want more or less of (from Peggy as a coach-facilitator)?
3. Any other comments:

Please comment on how **Andrea and Peggy worked together as a team**:

1. How well did they work together?
2. What would you want more of /less of (from them as a team)?
3. What suggestions can you give them to be more effective as a co-facilitation team ?

Is there anything else that you would like Andrea and Peggy to know about your experience of this coaching engagement?

Do you have any questions for Andrea and Peggy about the coaching engagement?

THANK YOU! YOUR FEEDBACK IS HIGHLY VALUED!