Team Coaching Practitioner

SESSION 4 WORKBOOK: PREPARING TO COACH THE TEAM

Coaching and Mentoring International

TURNER INTERNATIONAL

Contents

Systems in team coaching

Teams are a system in themselves. And like any other system, attempts to change a small part of them tend to fail, because the rest of the system works to re-establish the status quo. That's why so much one-to-one coaching is less effective than it could be – it doesn't change the systems, of which the coachee is a part.

Teams are also part of wider systems and, in turn, they have internal systems within them. Some of the most common systems include:

- Leader-member exchange (the habits and norms of behaviour between the team leader and individual team members; and between the team leader and the team as a whole)
- Relationships between team members (how they inform and support each other – or not)
- Collective processes and systems (the procedures for getting work done)
- Relationships with other teams + stakeholders (how the team inform and support outsiders – or not)
- Organizational systems and culture (the often subtle influences on how the team perceives its role within the business and how it delivers what it is tasked with.) The ethical climate is a significant factor in this system.
- Societal systems (how the team is influenced by wider societal perspectives)

For a team to become fully self-aware, it needs to:

- Recognise the multiple systems that underpin its performance
- Re-assess regularly how those systems work and how they might be improved
- Understand the difference between systemic and systematic approaches to problem solving

Exercise:
Identify as many systems as you can, with which this team is involved. Classify them as:

- Internal
- External
- Partly internal, partly external

Consider the following questions about each system (or one or two selected systems):

- What is this system intended to achieve? (What is it there for?)
- How does that purpose support the team's vision, priorities and performance?
- To what extent and how is this system dependent upon, or has influence upon other systems?
- When does this system function at its best?
- When does it function poorly?
- How might we improve this system to make it more consistently effective?

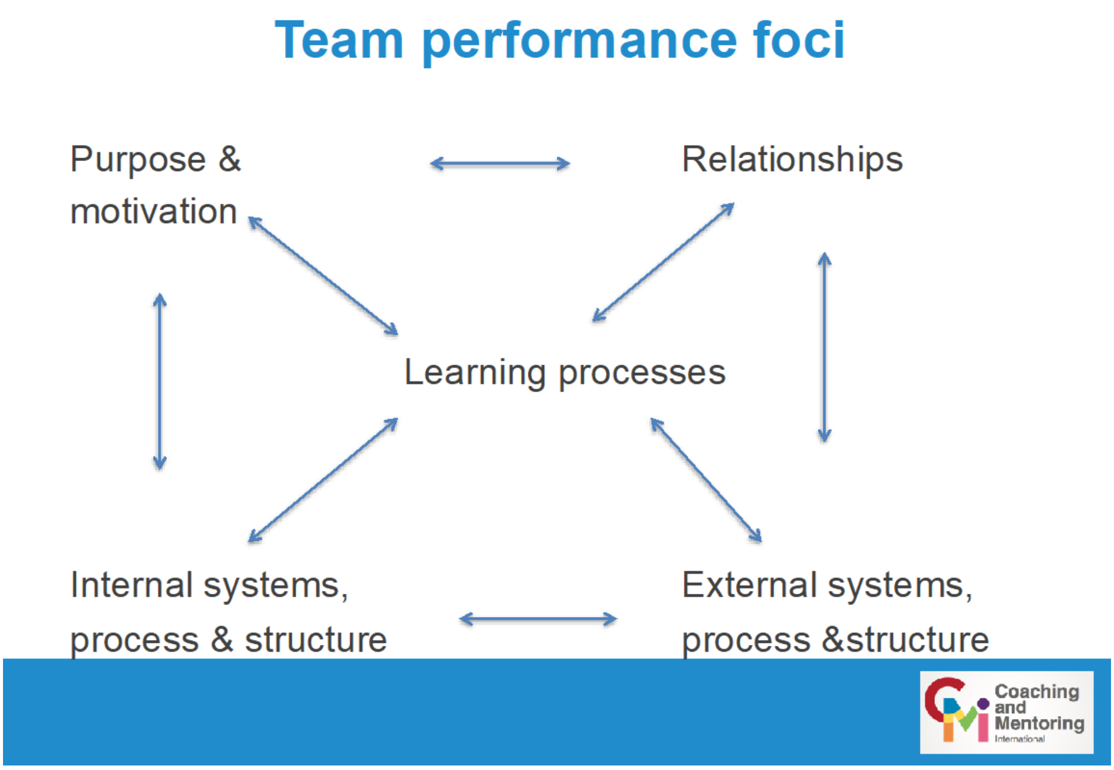
Clutterbuck's five pillars of team performance

The five pillars encompass any repeated activity or process that impacts the team's performance. They are derived from a detailed analysis of numerous studies of team performance.

The five pillars are:

1. Purpose and motivation – what the team is there for and the energy the team has to accomplish its mission
2. Relationships – how people support each other and leverage the collective strengths and energies of the team members
3. Internal processes and systems – how the team approaches its tasks, develops understanding of overt and covert systems, and co-ordinates effort
4. External processes and systems – how the team collaborates with its stakeholders
5. Learning processes – how the team grows and evolves to meet changing requirements and develop new capabilities.

What can go wrong in each of the 5 pillars of team performance?



Purpose and motivation

- Purpose too vague/ People interpret it in different ways
- Purpose not endorsed from above / inadequate direction from above
- Little or no connection with people's strongly held values (so low energy for achieving it) / Conflicts with other strongly-held values
- Conflict about priorities between goals
- Personal agendas predominate over the collective agenda
- Low individual and collective resilience

Relationships

- Conflict is not addressed/ is denied
- Lack of psychological safety
- People feel undervalued / unsupported
- Cliques and sub-groups
- Lack of willingness to share responsibility for collective performance (blame)
- Communication problems (relational)

Internal processes, systems and structures

- Recurring quality problems
- Lack of clarity about tasks and roles
- Inadequate systems of review
- Lack of clarity about what constitutes good (high) performance in this context
- Unclear decision-making processes
- Communication problems (systemic)

External processes, systems and structures

- Reputational issues
- Lack of key resources
- Operating within a political environment
- Failure to establish clear expectations with stakeholders
- Environmental / market change
- Cultural influences

Learning processes

- "Too busy syndrome" (no time for reflection)
- Individual and collective learning insufficiently valued
- Lack of sources of external perspective and/or ideas
- Low learning maturity/ differences in personal maturity
- Resistance to change
- Mistakes are repeated (not learned from)

How would you coach a leader to take their team through the team coaching process?

While team leaders *can* be coaches to their teams, they are not necessarily the sole coach. Like most other functions of leadership, coaching can be distributed amongst the team, as an activity that everybody retains some responsibility for. The leader's role is to be the "coach in chief", and therefore a role model for effective coaching behaviours. The following guidelines describe the key steps to create a coaching culture in the team and how a coach can support a leader in each of these. While they broadly follow in sequence, in practice there may be considerable overlap between them as the coaching conversation creates opportunities to explore issues.

1. *Start with the leader, not the team*. It is no use trying to change the team, if the leader retains his or her old behaviours. Useful questions include:
    a. What behaviours do you need to change to role model what you want to see in the team?
    b. How can you make yourself more vulnerable, in order to create the necessary psychological safety for honest conversations in the team?
    c. What changes do you want to see in how the team behaves and functions?
    d. In what ways might you be getting in the way of the team performing at their collective best?
    e. How open to challenge by the team are you? What would make you more open?

2. *What is the purpose of better teaming for this team?* How will the team leader engage the team in agreeing what they are collectively there for, and how teaming would make a difference? The great thing about this stage is that it is a relatively unthreatening issue for team members to discuss, because it can be kept at an intellectual level – at least to begin with. Questions the coach can pose to the leader and the leader can pose to the team include:
    a. How much agreement is there within the team about its purpose and priorities?
    b. What do your stakeholders expect of the team today?
    c. What will they expect of you tomorrow?
    d. If you and the team listened to them better, what might you learn?
    e. What is it about the purpose that most energises the team?
    f. What are the gaps in your knowledge and the team's knowledge about stakeholder expectations? How can you fill those gaps in?

3. *How can we assess how well we are performing now?* Based on the critical expectations of stakeholders, where is the team on each criterion? (Is it poor, good, great or awesome?) One of the advantages the leader usually has over an external coach is that they know when the team is functioning at its best, and when it is not; when the team is most successful and least so. This inside knowledge can be helpful in encouraging the team to build a better understanding of the performance they might aspire to and what is achievable in the short and medium term. Useful questions include:
    a. What common themes can we see between these examples?
    b. What does that tell us about our ability and preparedness to meet stakeholders' *future* expectations of us?

c. Where we are good, great or awesome now, how close to complacent are we in danger of becoming?

4. ***How can we better understand the forces that shape our performance -- our internal dynamics and external drivers and hindrances?*** Here the coach can support the leader in mapping the multiple systems of the team – both internal and external. Useful questions include:
    a. What do you *assume* about each of these systems and what do you genuinely *know*?
    b. How will you find out?

    The 5Cs and PERILL models provide pragmatic frameworks for this conversation. By working through this process with the team leader, the coach prepares them to have a similar conversation with his or her team It is important that the team leader understands whichever framework is used sufficiently to explain it clearly to his or her team. The coach can, for example, rehearse with the leader how they will present the chosen framework to their team.

    This is also the point, where diagnostics can be very helpful. However, in selecting which diagnostics to apply, the coach should bear in mind:
    a. The more you use, the more confused the team may become
    b. Most diagnostics require an expert debrief, which the leader may not be qualified to deliver
    c. The coach and the leader must both be very clear about how this information is going to inform and support the change process – and the team must also understand this rationale

5. ***Create a change plan***. The coach explores with the leader how to gain commitment from the team to the broad change goals. The coach also clarifies the difference between selling the leader's goals to the team and engaging the team in creating the goals with the leader. Key questions include:
    a. What information and background do they need to make good decisions?
    b. How will you ensure that you listen fully to their ideas?
    c. How will you ensure you don't drive your ideas through and so reduce their commitment?

6. ***Create enabling conditions.*** Having reflected upon his or her own behaviour early in the process, the team leader will be better prepared to help the team follow suit. The four key enabling conditions are behaviour, roles & responsibilities, resources and processes:
    - Behaviour: How will we support each other to perform at our collective best?
    - Roles & responsibilities: What needs to be done and by whom? How is accountability shared within the team?
    - Resources: How can we obtain what we need to do the job?
    - How do we continuously adapt and improve our processes to make them more effective, more efficient and to keep them aligned with changing needs form our environment?

    The coach can rehearse with the leader how he or she will facilitate the team in developing new norms of behaviour that lead to greater psychological safety, where everyone respects and values their colleagues both for who they are and the contribution they bring. At this point, the coach will typically share tools and techniques that enhance trust and enable people to speak more openly than they may have been used to.

The coach may also explore with the leader how to create a map of roles and responsibilities, starting with the leader's own and moving on to how these roles and responsibilities interface with the team and the to how the team members' roles and responsibilities interlink and overlap. Once again, the aim is for the leader to emulate the conversation with the coach in subsequent conversations with the team.

While it is often the team leader, who takes on the role of acquiring resources, this is also fertile ground for engaging the creativity of the team as a whole. This is particular important when building capacity (achieving more with fewer resources), where the leader's ingenuity can be leveraged with ideas from the whole team. Similarly, mapping processes and looking for ways to improve them is usually far more effective as a collaborative activity than as a solitary one.

Useful questions include:

a. How will you use your vulnerability to help the team to feel safe enough to explore behavioural issues?
b. What would make it safe for team members to name the "elephant in the room"?
c. How much of your role could the team adopt, leaving you free to focus on more important things?
d. How can you share the burden of finding resources with the team?
e. How can you engage the collective creativity and intelligence of the team address your biggest headaches?

7. ***Team coaching conversations.*** While too much planning on the part of the leader may stifle open discussion, rehearsing key conversations with the coach is one of the ways the leader can accelerate change. Useful questions here include:
    - What is the impact you want to have on the team and what behaviours on your part will best lead to achieving them?
    - How will you role model the behaviours, such as active listening, that you want them to adopt?
    - How much structure do you need to the conversation and how much can you allow it to be free flowing?
    - How will you ensure that your power and authority don't get in the way of open dialogue?

8. ***Review.*** The team coach can also debrief the leader on how each coaching conversation (whether with individuals or the team collectively) has gone. What could they have done differently? How can they apply the learning from their reflections? Longer term, the coach helps the leader reflect upon and measure the progress the team has made. Frequently, this is the point at which the need arises for either one-to-one coaching for other members of the team, or for professional team coaching. The coach needs to consider carefully the appropriateness of taking on these roles and, in the case of coaching the whole team, whether they have the competence to do so, or whether they should be referring on to a trained team coach.

Continuous contracting and recontracting

It is evident that working with team issues by proxy is significantly more complex and potentially more dangerous than working on specific personal development needs of a leader client. Even if the coach accompanies the leader to team meetings and observes, most of the data they are working with will be second hand, through the lens of the leader's perspectives and biases. There is also an ever-present danger of slipping into consultancy role or inadvertently doing the leader's job for them.

Inexperienced coaches may feel out of their depth when the leader needs guidance on tools and techniques that are unfamiliar or unknown to them. It is important here to recognise the difference between given advice and giving context. Context is information the coach holds and the client does not have access to, which will be useful to the quality of the client's thinking in formulating ways forward. Advice is doing the thinking for the client.

Because of all these complexities, it is essential that the coach continuously contracts and recontracts with the team leader. Whenever recontracting, these three questions to team leaders are useful context setters:

- What is the conversation you need to have with yourself?
- What is the conversation you need to have with your team colleagues?
- What is the conversation you need to have with your stakeholders?

Summary

Coaching team leaders to coach their teams is a steppingstone between traditional one-to-one executive coaching and team coaching. Experience gathered from numerous coaches around the world suggest that this is an essential interim stage, where the coach develops confidence and competence in supporting teams without exposing themselves to the much greater challenge and complexity of team coaching.

Factors to consider regarding team's readiness for team coaching

One of purposes of the Discovery and Preparation phase is to determine, at an early stage of the engagement, how ready the team is for team coaching and if team coaching is indeed the appropriate form of team development.

Below are some of the key questions to consider before you formally engage in team coaching. One can never discover or know everything but the factors and questions below will help you in your considerations.

How ready is this team for coaching?

1. Do the team members have positive experience and expectations of coaching?
2. Does the team see team coaching as both urgent and important?
3. Does the team have an appropriate mix of complementary skills, relevant to its expected outcomes?
4. Are the team members genuinely committed to becoming a high performing team?
5. Are the team members – including the leader -- committed to open and honest dialogue?
6. Are they – including the leader – willing to challenge themselves and each other?
7. Are the team leader's motivations for introducing team coaching transparent and accepted by the team members?
8. Is it clear who is in the team and why?
9. Is team membership likely to change during the period of the team coaching?
10. Is the team willing to address and review its purpose and priorities?
11. Do team members genuinely want to collaborate rather than work in silos?
12. Does the team meet at least monthly?
13. Do team members accept responsibility for their own and their colleagues' learning and development?
14. Is the team adequately resourced (in terms of money, time, information, etc) to achieve its goals?
15. Is the team prepared to invest time into coaching sessions and into implementing necessary changes?
16. Is the team willing to address internal conflict?
17. Is the team prepared to address poor performance by individual members?
18. Is the team manager prepared to undertake personal change, to better support team performance?
19. Is team coaching supported by key stakeholders outside the team?
20. Are there any other significant barriers to making team coaching work?

Multi-stakeholder contracting

A central issue in team coaching and essential in contracting is clarity of responsibility. There are typically four major stakeholders in externally resourced team coaching: the team; the team leader/manager; other team members (i.e., apart from the manager); and the sponsor. Issues that need to be foreseen and managed include:

- The team leader's behaviour or competence may be one of the primary reasons for poor team performance – hence there is a potential for conflict of loyalty
- The team and the leader may have different agendas, as may the sponsor
- Many teams are in fact composed of sub-teams, with considerable variation in their willingness and ability to collaborate – and with different agendas and priorities.

Contracting with the team leader

Consider the questions:

- *What conversation would best help you to understand the leader's intentions, motivations and fears?*
- *What commitments might you require from the leader and what might they need from you?*

Your thoughts

Agreeing with the team leader how to manage the team coaching session

It's easy to forget how much the team leader has to make a leap of faith in trusting a team coach to work with his or her team. Among the (very rational) fears the leader may have are:

- Will the team coach usurp my authority?
- Is the session going to become a gripe session against me?
- Will the conversation bring into the open issues I'm not ready to discuss openly?

It is essential to have a pre-conversation with the team leader to prepare for how you will work together to make the coaching a success. Ideally, the role of the leader is to:

- Observe and learn
- Let the team do as much of the talking as possible
- Intervene in ways that will support co-learning (i.e. be careful not to close open conversation down)

On the agenda should be:

- Who will facilitate the conversation, at which points?
- Who will open the session and outline its purpose?
- How will the coach signal the leader, when his or her interventions are unhelpful? (If the team coach does nothing, the team members will feel less safe and become less open. If he or she puts down the leader, everyone is embarrassed and it will take time to recover.)
- How will the leader signal the coach, if he or she feels the conversation is going in the wrong direction?
- How will the leader role model the behaviours that make for good co-learning and co-coaching?
- What are the "no-no" actions for the leader to avoid? These include:
    - Talking too much
    - Closing down team members' when they speak
    - Seizing control of the flip chart (and hence re-establishing who is in charge)
    - Setting a poor example, such as checking their i-phone while others are talking

Regular breaks for tea or coffee provide an opportunity to review with the leader, how he or she is feeling and where to steer the conversation next.

Your thoughts

Contracting with a sponsor

- What conversation would help to ensure the sponsor is supportive and realistic in their expectations of the coaching intervention?

Your thoughts

Contracting with yourself

- What can you do to protect your own well-being?
- How will you manage your own expectations?
- How will you manage boundaries?

Exercise: What contract can you set with yourself?

Your thoughts

Contracting with the team individually

Consider the questions:

- *What conversation would best help you to understand each team member's intentions, motivations and fears?*
- *What commitments might you require from them and what might they need from you?*

Your thoughts

Contracting between team coaches

You and your co-coach must role-model being an effective team. In contracting with each other, you may wish to consider, for example:

- How you will introduce yourselves and each other
- When and how to take over from each other
- When and how to make each other aware of a dynamic in the room
- How to observe and give feedback to each other
- How to work with each other's strengths and support each other's weaknesses
- How you will prepare for each session and how you will debrief after each session
- What you need from each other to feel confident

Your thoughts

Contracting with the team collectively

Consider the questions:

- *What conversation would best help the team contract together about how to make team coaching work for them?*
- *What contract might they need from you?*

Your thoughts

The role of the sponsor

Team coaches tend to be brought in to work with teams either by the team leader or, more frequently, by a more senior person, to whom the team leader reports. This latter person, usually referred to as a sponsor, may well have a different expectation of the team coaching process and the intended outcomes than do the team and/or its leader. Sometimes the HR function may be used as an intermediary between the sponsor and the team coach. It is important to insist on a conversation with the sponsor direct, because:

- The HR professional may unconsciously put their own spin on the assignment
- Sponsors often reveal far more to a coach, who knows the right questions to ask than they may to an internal HR person
- There is no hierarchical pressure between coach and sponsor

Clarifying expectations with the sponsor is vital in gaining their support and establishing a realistic picture of what can and can't be achieved through team coaching.

Contracting with the sponsor

Contracting with the sponsor tends to be mostly about an open conversation with the coach – ideally without other stakeholder's present, so they can be less guarded.

A typical contract might include the following:

[Coach] is employed to support the team in addressing a range of issues related to its performance, with particular but not exclusive reference to [topics]. The specifics of the conversations between the team and the coach, and between the leader and the coach, will remain confidential. The team will be encouraged to contract with the sponsor with regards to measurable outcomes they aim to achieve, and to the nature and frequency of feedback to the sponsor.

The coach guarantees to maintain confidentiality of all information derived in the pursuance of the team coaching assignment. It is not the role of the team coach to provide an opinion on the team, its members or its leader(s).

The sponsor is responsible for:

- Agreeing with the team and its leader the performance improvements sought from team coaching. These will be balanced between achievement of measurable targets, behaviours and systems improvements that support higher performance, and building the team's capability and capacity to address future challenges
- Supporting the team and its leader in addressing both the internal and external systems that influence performance

The Importance of Psychological Safety in Team Coaching

By Colm Murphy and Tammy Turner

This short article sets out what psychological safety is and is not, its importance and relationship to team effectiveness and in turn, to team coaching.

We can all probably relate to having experienced low psychological safety at some point within a team or a group - that immediate feeling of being unable to speak up with ideas, questions or concerns due to a fear of ridicule or hurt or being embarrassed.

It is important to highlight that psychological safety is a not a fancy term for trust. As outlined below, they are related but fundamentally different concepts.

What is psychological safety?
Amy Edmondson (2014) defined it as "individuals' perceptions about the consequences of interpersonal risks in their work environment. It consists of taken-for-granted beliefs about how others will respond when one puts oneself on the line, such as by asking a question, seeking feedback, reporting a mistake, or proposing a new idea."

Two key characteristics of the psychological safety are highlighted in the literature:

- It is experienced at a group level as opposed to an individual level. In a team, individual team members will tend to have similar perceptions of whether or not the team climate is psychologically safe.
- The group experiences the impact of interpersonal dynamics immediately (Edmondson, 2019) as opposed a time frame of future consequences.

Why is it different from trust?
Trust relates to interactions between two individuals or parties as opposed to being experienced at a group level. Trust is an expectation that someone can be counted on to do something in a future moment, as opposed to the immediate felt sense of psychological safety. Edmondson (2019) summarised that difference as trust being about giving others the benefit of the doubt, whereas psychological safety relates to whether others will give you the benefit of the doubt as you share your thoughts or ask for help.

Psychological Safety	Trust
Is a group construct	Is an individual construct
Measures if it's ok to openly share concepts and make mistakes	Measures if another can be counted on to do what they say they'll do
Measured by team members - they 'know' if the environment is safe	Measured by an individual about the other
Gives you as a contributing team member the benefit of the doubt	You give the other person the benefit of the doubt for getting things done

Table 1: Difference between Psychological Safety and Trust (Turner, 2019)

Psychological safety is a key variable of success for teams working well together and is as key to team coaching as trust is a 1 to 1 coaching relationship – it an emergent success factor that allows support and challenge to be present in the work.

Why is psychological safety relevant to team coaching?
One simple answer is that if it's relevant to the better functioning of teams, then it is relevant to team coaching. A team coach can assist the team to continuously raise their awareness about levels of psychological safety in the room in service of the team's functioning.

We also propose that team coaching can contribute to psychological safety and hence in turn to team functioning. Kahn (1990) identified four contributing factors to psychological safety: interpersonal relationships, group dynamics, leadership and organizational norms. All of these contributing factors are at play when a team coach works with a team. The team coach can play an important role in not only shining a light of these factors and their impact, but also in role modelling their interpersonal relationships with team members and their style of leadership. Role modelling encourages others to speak up, share ideas and ask for help. If the team coach can stay with the moments when psychological safety gets challenged (the put down, the eye roll, the mocking laugh), they can raise awareness and help build new ways of communicating within the team.

Why is psychological safety important to teams?
Team effectiveness researchers have identified the link between psychological safety and team performance (Mathieu, Maynard, Rapp & Gilson, 2008) resulting in psychological safety being identified as one of the key contributing factors (Dinh & Salas, 2017) within team effectiveness models (Burke, Stagl, Salas, Pierce, & Kendall, 2006). Dinh & Salas (2017) locate psychological safety as a core component of co-operation, a hallmark of teaming.

Psychological safety promotes candour and effective conflict management. Teams with high psychological safety are able to say what needs to be said, to listen to each other and to avoid slipping into personal conflict when dealing with task or process conflict. Table 2 below captures the important interplay between the team's performance standards and their psychological safety in terms of how both impact the mood in the team and how they get things done.

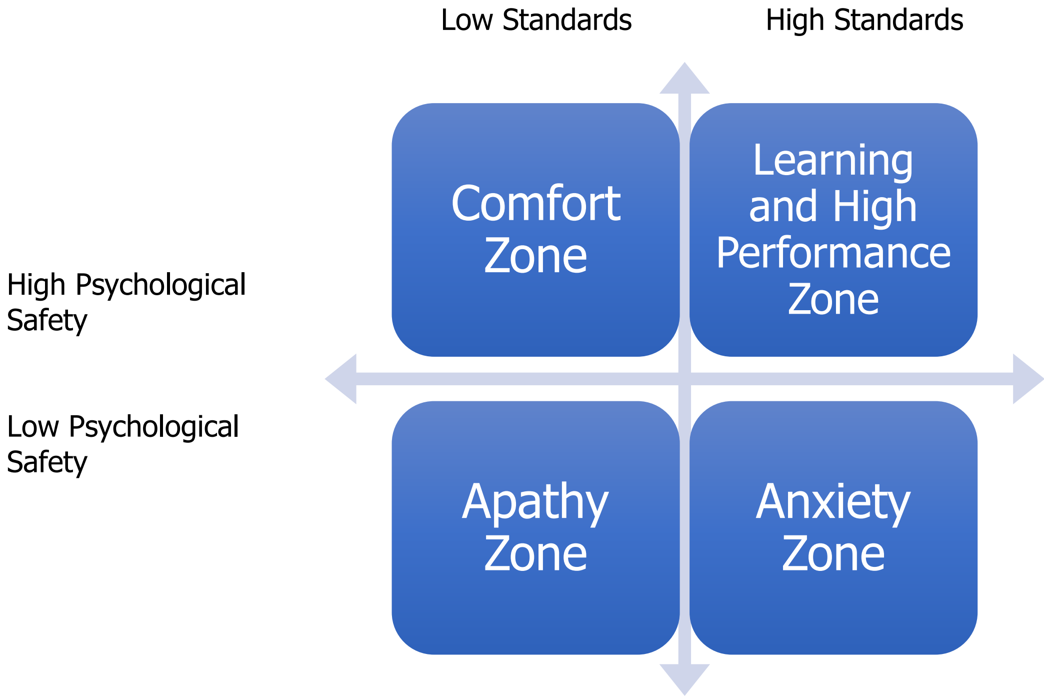


Table 2: How psychological safety relates to performance standards (Edmondson, 2019)

As table 2 illustrates, the optimal place for teams to learn is when both psychological safety and standards are high. The role of the team coach is to give the team opportunities to identify their standards of how they want to operate together and have a 'felt sense' of being in a psychologically safe environment. Once the team has an understanding of these factors, they can identify for themselves how to get out of the other zones and back up into the learning zone.

However, the team coach will struggle to make a difference if the team continues to operate within its comfort zone, or there is apathy or excessive anxiety during team coaching sessions.

Why is psychological safety important for you as a team coach?
As outlined previously, psychological safety is as equally important to a team coach as it is to the functioning of the team. Being present and staying alert for critical moments that impact a team's psychological safety is vital for a team coach. Psychological safety is vital for the team coach to meaningfully support and challenge the team while in turn helping the team develop its own collective reflection and awareness; creating teaming and learning which benefits not just the team being coached but also the stakeholders and teams that interact with that team, and by extension the entire organisation.

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How psychologically safe is this team?

In the past month, I have:	Not once	Once	2 - 3 times	4 times or more
1. Held back on giving a colleague honest and critical feedback				
2. Felt that a helpful suggestion from me might not be received positively				
3. Not admitted a mistake, which colleagues might have learned from				
4. Felt that my ideas weren't valued				
5. Been upset by a colleague's comments				
6. Avoided mentioning something for fear of "treading on a colleague's territory"				
7. Pretended I understood something I really didn't				
8. Kept silent about something that didn't seem congruent with the team's espoused values				
9. Covered up for a colleague's mistakes				
10. Felt pressured into supporting something that didn't seem right to me				
11. Steered clear of a senior colleague, because they appeared to be in a bad mood				
12. Told a white lie to "keep the peace"				
13. Suspected that I wasn't being told the whole truth, but not confronted the issue				
14. Been made to feel isolated or disloyal when I questioned something outside of my area				

In this team:	Not once	Once	2 - 3 times	4 times or more
1. Status is often more important than getting the job done				
2. People often form cliques to pursue their own interests				
3. It's not a good idea to question what the leader says				
4. People generally avoid honest, difficult conversations				
5. Loyalty and respect are demanded, rather than earned				
6. People say what they think others want to hear, not what they really think				

Scoring

For each item score:
0 for not once; 1 for once; 2 for 2-3 times; 3 for 4 times or more.

As very broad indicators:

50 points or more: This team is a dangerous place to be. There are high levels of stress (significantly increased risk of heart attacks and other ailments). Politics is rife.

25 - 50 points: Lack of psychological safety contributes substantially to team dysfunction.

5 - 25 points: The team members are good at papering over the cracks. There is enough goodwill and collective focus to ensure that honest conversations happen before too much damage is done, but the team is still missing out on the benefits of a genuinely open climate.

0-5 points: Nobody's perfect! But this team works hard to create an environment, where it's not just OK to speak up, but where people expect and appreciate it.

Team coaching virtual teams

Virtual teams have a number of differences compared with co-located teams. On the plus side, their geographical dispersion means that they can draw upon a wider and more diverse pool of talent. It is also easier to maintain 24-hour oversight of issues, if people are in multiple time zones. There is also some evidence that power distance (people's inclination to defer to someone with greater rank or authority) reduces when using distance media.

On the downside:

- There is more likely to be conflict within the team – and this may be exacerbated if the team is culturally diverse
- There are more difficulties in sharing information. "Out of sight, out of mind" means that it doesn't occur to us to include a colleague unless we communicate with them very regularly on different levels. Virtual teams need string and effective mechanisms to remind everyone to appraise virtual colleagues about technical, tactical and customer information – indeed to put more effort into communicating with them than with co-located colleagues, because the latter pick up a great amount of information through informal conversations. One of the immediate impacts of team coaching is to raise team members' awareness of the interests and strengths of each of their virtual colleagues.
- People are more likely to feel isolated. This sense of being left out can be reinforced in virtual meetings, when not everyone shares experiences, or relates to metaphors and mental models, which other members of the team use as conversational shorthand.
- If some of the team are located at HQ, others may feel that these people's opinion counts for more than their own and that they are less likely to be listened to – so are less likely to voice opinions.

Preparing a virtual team for coaching

All the normal aspects of contracting with the team, which apply to co-located teams, also apply to virtual team coaching – plus a few more. These include:

- It's important to have ground-rules about being fully present in the team coaching sessions. Being on mute is useful to preserve sound quality for those who are speaking, but it allows people to carry on distracting tasks, which would not normally be possible in a face-to-face meeting. The contract should reinforce understanding that listening is more than just politeness to colleagues – it is essential in maintaining the pace and depth of the reflective conversation.
- Gain agreement on how contrarian ideas will be surfaced and engaged with. The mechanisms, by which constructive dissent is stifled, may differ between co-located teams and virtual teams. In many cultures, for example, it is inappropriate to be the one who usually gets their ideas in first. If a consensus appears to be developing, cultural inhibitors may make people reluctant to push back against it. The technology may promote groupthink, if people are swayed by the first comments in the chat room, so the team and the team coach need to establish clear methods to challenge emerging consensus.
- Help the team manage the tendency to avoid emotional data, because it is too time consuming and often more difficult to recognise emotional subtexts in a virtual environment. It's important to establish the expectation that everyone will be open with their emotions as well as their rational analysis. One of the reasons for this is the significant role our emotional brain takes in "rational decisions".

- Initiate open discussion about where reflection takes place. In co-located teams, it is generally easier to engage in reflection together, not least because these coaching sessions will have a fair amount of time allocated to them. In virtual team coaching, every minute counts, so most of the reflection has to take place before and after team coaching. This is a fundamental difference in the structure of the team coaching process and the team needs to become comfortable with reflecting on their own then combining their thoughts either during team coaching or in online discussions outside the team coaching session.
- Encourage the team to agree when would be an equitable time to hold meetings, to avoid some people always having to attend at unsocial hours
- Newcomers to a virtual team need to feel valued from day one. One-to-one virtual meetings with the rest of the team members, before team coaching, are an essential part of their induction.

Managing the virtual team coaching session

While it is possible to run a virtual team coaching session using email only, it is extremely difficult to make it work! The only plus point is that it can be asynchronous – people can contribute at different times, dipping in and out over a day or more, at their convenience and to fit in with their time zones. There have been no significant studies comparing this approach with having people together at the same time, but the consensus amongst team coaches is overwhelmingly that the whole team needs to be present and interacting in real time.
Some ground-rules include:

- Keep sessions short and focused – 90 minutes absolute maximum. This makes it even more important than with co-located teams to dispense with standard meeting formalities, such as minutes of the last meeting, or matters arising. Everything that can be done by email beforehand should be, along with any matter that concerns only some of the team. Given that you have such a short time, it is essential that everyone should feel engaged all through.
- Encourage social sharing before the coaching session. A short email from everyone, sharing personal highlights at work and outside work, is all it takes.
- Use the technology to its full. Make sure everyone is visually present, unless bandwidth problems prevent this. Encourage chat room conversations alongside spoken conversations. Run quick, impromptu polls to support the conversation. For example:
    - How energised are we today?
    - How positive do we feel about this?
    - How confident are we in these forecasts?
    - What should be said that no-one has yet said?
    - What are our priorities with regard to this issue?
    - What do you think are the top three risks?
- Set clear norms about preparation, promptness, interrupting, being in a quiet place, where background noise won't intrude and so on.
- Don't get trapped into PowerPoint presentations that take up valuable time.
- Do have a clear protocol for decision-making. Check through a poll or the chat room that everyone agrees:
    - That a decision has been made
    - Precisely what it is
    - Who is responsible for what
    - When it is to be implemented
    - When and how it is to be reviewed

- People who waffle can be a nuisance. Agree with the team how they will manage this. If you try to control this person, you will find that the team keeps looking to you to take charge – exactly the opposite of what you are trying to achieve. An effective intervention, if no-one in the team takes responsibility, is to say "Can I just remind you what you contracted to each other about trying to be succinct?" This emphasises the team's responsibility for managing the situation, while dropping an obvious hint to the offending team member!
- Agree a clear protocol for other issues that arise in the coaching session. Put these in a "parking lot" and take a few minutes at the end of the session to discuss how they can start the process of thinking about some or all of them before the next session. Ask them "What is the critical question you want to reflect upon with regard to this issue?" (You can always suggest a question at this stage, if they struggle – or perhaps the homework is to identify that question.)

Team efficacy

The questionnaire below is a simple template for exploring some of the issues of team efficacy. Based on a team you know well, what picture would emerge from addressing these issues? How would you help the team decide which to focus on?

A simple team effectiveness diagnostic

A. Task

- What are our three critical priorities? (The things we have to deliver?)
- How will we know if we've succeeded or failed?
- Do we know who our customers are? (internal and external)
- Do we know what they want and need from us? (And do they know?)
- What's the quality of what we deliver? (Is it what they want/ need?)
- What reputation/ brand do we have with them?
- What do we do now that reinforces or undermines our reputation/ the quality of our work?
- Do we know specifically what needs to improve and how?
- Do we know what we are going to do to deliver those improvements?
    - Resources
    - Skills + competencies
    - Processes
    - Communication
    - Behaviours
- Do we understand the difference between efficiency and effectiveness? (What are we doing efficiently that is hindering our performance?)
- Are we clear about which influences on our performance are within our control / influence; and which are not? How can we move the latter, so we can influence them?
- What have we not considered that might affect our performance next year?

B. Behaviour

- Do we communicate openly and effectively within the team?
- Do we communicate openly and effectively to people outside the team?
- Do we have a high level of trust?
- Do we support each other?
- Do we give recognition and praise when appropriate?
- Are we flexible in our routines and processes?
- Do we "go the extra mile" when needed?
- Do we give each other sufficient honest feedback?
- Do we have high expectations of our own and each other's behaviour?

C. Learning

- Do we take time to review our activities and reflect upon practice?
- Do team members report back on learning from courses?
- Are individual development plans linked into a team development plan?
- Do we take these development plans seriously?
- Do team members receive coaching or mentoring when they need it?
- Do we learn from our mistakes?

- Do we actively seek ideas from elsewhere?
- Do we innovate in both what we do and how we do it?

Agreeing with the team leader how to manage the team coaching session

It's easy to forget how much the team leader has to make a leap of faith in trusting a team coach to work with his or her team. Among the (very rational) fears the leader may have are:

- Will the team coach usurp my authority?
- Is the session going to become a gripe session against me?
- Will the conversation bring into the open issues I'm not ready to discuss openly?

It is essential to have a pre-conversation with the team leader to prepare for how you will work together to make the coaching a success. Ideally, the role of the leader is to:

- Observe and learn
- Let the team do as much of the talking as possible
- Intervene in ways that will support co-learning (i.e. be careful not to close open conversation down)

On the agenda should be:

- Who will facilitate the conversation, at which points?
- Who will open the session and outline its purpose?
- How will the coach signal the leader, when his or her interventions are unhelpful? (If the team coach does nothing, the team members will feel less safe and become less open. If he or she puts down the leader, everyone is embarrassed and it will take time to recover.)
- How will the leader signal the coach, if he or she feels the conversation is going in the wrong direction?
- How will the leader role model the behaviours that make for good co-learning and co-coaching?
- What are the "no-no" actions for the leader to avoid? These include:
    - Talking too much
    - Closing down team members' when they speak
    - Seizing control of the flip chart (and hence re-establishing who is in charge)
    - Setting a poor example, such as checking their i-phone while others are talking

Regular breaks for tea or coffee provide an opportunity to review with the leader, how he or she is feeling and where to steer the conversation next.

The team as a system or part of multiple systems

Whether at the level of an individual or a team, coaching fundamentally works by helping people better understand their internal context and their external context – then to have structured conversations about how those two contexts interact, with the view to improving both decisions and how they act upon them. Individual coaching often fails because it addresses only the individual, and not the systems around them. Systems theory says very clearly that, when we attempt to change one part of a system, the rest of the system works hard to re-establish the equilibrium – that is, to restore things to the way they were before.

Every team is a system and contains other systems within itself. It also interacts with and is part of a wide variety of external systems, many of which can affect its performance.

Reflecting on a team, with which you are familiar, attempt to define some of its key systems – for example, for:

- Making important decisions
- Keeping people in the team informed
- Keeping people outside the team informed
- Listening to customers
- Surfacing technical problems
- Surfacing behavioural problems
- Distributing tasks and responsibilities
- Planning

Classify them as:

- Internal
- External
- Partly internal, partly external

Consider the following questions about each system (or one or two selected systems):

- *What is this system intended to achieve? (What is it there for?)*
- *How does that purpose support the team's vision, priorities and performance?*
- *To what extent and how is this system dependent upon, or has influence upon other systems?*
- *What has changed in the environment surrounding this system?*
- *When does this system function at its best?*
- *When does it function poorly?*
- *How might we improve this system to make it more consistently effective?*

Systemic team coaching

Systemic team coaching has two aspects. One is to help teams understand the multiple systems they are part of or occur within the team. The other is to help the team develop practical ways to manage, monitor and review those systems.

Systems can be internal, external or boundary-crossing. Here are some examples of each.

Internal systems

- Sub-groups or alliances within the team. These can be based on shared experiences, shared interests or priorities, personality type and so on
- Communication systems – who keeps whom informed about what
- How the team inducts newcomers
- The leader-follower system between the team leader and the team

External systems

- Any other team this team interfaces with
- The priorities of the leader's boss and other influencers in the corporate hierarchy
- Fixed systems of financial reporting, hiring and firing, compliance with legal requirements

Boundary-crossing systems

- Negotiating for resources
- Project teams, in which members of this team take part
- How the team gathers information about customer requirements and perceptions

Identifying systems can be difficult, because they are not obvious. To make them evident, we can focus on three coaching questions:

1. What has to happen for us to succeed in our task?
2. How does that happen?
3. What influences whether it happens well or less well?

These questions typically identify two kinds of system. Task systems are about what the team does and how it uses its resources. Relational systems are about how people work together – how supportive they are, how they combine and recombine in subgroups to achieve individual and collective agendas.

Systems mapping provides a visual representation of the system. For task systems, you can use different shapes (circles, squares, triangles etc) to represent different categories of event, such as an action, a decision, and consultation. By working through several accounts of what happens in a system, we can rapidly recognise where things are not working as well as they should. For example, key people may be left out of the information loop, or there may be insufficient clarity about responsibilities. Redesigning the system may require a few tweaks or a complete overhaul.

For relational systems, socio-mapping measures how everyone relates to everyone else. For example, a map might represent the perceived quality and frequency of the communication between team members and the quality and frequency they need from each other.

The bottom line is that you don't know there is a system, or don't know how it works, you can't improve it!

Your thoughts

The PERILL model of team coaching

The PERILL model is based on 20 years of observation and research into team performance and dysfunction. Most models of teams focus either on high performance or dysfunction. PERILL takes a systemic perspective that recognises that these aspects are linked. It identifies five contexts, in which teams may function well or poorly, and one moderating factor (Leadership) that affects how these contexts are managed. The elements are:

Purpose and motivation
Purpose is about what the team is there to do. It is the mission in Hawkins' commissioning. The team purpose may be a subset of a wider organisational purpose or one generated from within. From purpose flows the collective energy that makes "the whole greater than the sum of the parts". Indicators include clarity of shared vision, goals and priorities.

External processes, systems and structures
These are about how the team interrelates with its multiple stakeholders – customers, suppliers, shareholders, other teams within the organisation, more senior levels of management and so on. Indicators include reputation, performance against targets, environmental awareness (evolving markets, technology, competition etc). They also cover the team's access to resources, such as information and finance.

Relationships
These are about how people work together – whether they enjoy each other's company, respect each other's ability, are honest towards each other and so on. Indicators include the level of psychological safety.

Internal processes, systems and structures
This is the internal mirror to the external and includes how the team manages workflow, supports each other, and maintains high quality of communication (both task-related and affective). Indicators include role clarity and decision-making quality.

Learning
This relates to the team's ability to respond to its changing environment and maintain continuous improvement and growth. Indicators include whether it is ahead or behind the curve in terms of change in its environment and the clarity and relevance of members' learning objectives.

Leadership
The literature on leadership is vast, with well over 200,000 citations, often contradictory. The GLOBE (Global Leadership and Organizational Effectiveness Studies – globe.com) demonstrate that perceptions and expectations of leaders vary extensively between cultures. The link between what leaders do and how the team performs is very hard to pin down, because it is not just about the leader and what he or she does. It is about the system, of which the team and the leader are part. So, models that rely solely on a set of leader competencies miss the point. One of the most powerful exercises in team coaching is to ask the team (with the leader's agreement) to specify what kind of leadership behaviours they need to be able to perform at their best, both individually and collectively. (The two lists are not necessarily the same!) Then the team discusses with the leader their responsibilities in helping him or her become the leader they need.

The diagram below illustrates ways in which these contexts interact to affect team performance (light grey) and dysfunction (dark grey). The white boxes indicate the moderating effect of the leader's qualities and behaviours (LQB).

PERILL: The contexts of team performance and dysfunction

LQB	**Purpose & Motivation**	**Externally facing processes**	**Relationships**	**Internally facing processes**	**Learning**
Purpose & Motivation	**LQB**	Alignment of values between the team and its key stakeholders	Working enthusiastically together towards shared goals	Clarity of priorities; putting collective priorities before personal	Actively seeking ways to leverage and expand team strengths
Externally facing processes	Stakeholders unclear what you stand for	**LQB**	Strong collaborative relationships with stakeholders	Rapid and effective response to quality issues	Rapid product and service innovation
Relationships	People pursue their own agendas	Conflict with stakeholders; disrespect for stakeholders	**LQB**	High level of psychological safety leads to constant questioning of what we do	People take active responsibility for supporting each other's development
Internally facing processes	Duplication and waste of effort	Quality issues not acknowledged or addressed	People avoid "interfering" in each other's territory. Large "elephants in the room".	**LQB**	Culture of continuous process improvement
Learning	Learning focused on the individual not the collective	Slow to innovate	People "hoard" knowledge and expertise	Resistance to change	**LQB**

Discuss in small groups how this model captures the essence of teams you are familiar with. What would be the implications of strengths and weaknesses in each area?

Your thoughts

Looking for leadership bias

Open-minded as we like to think we are, all leaders are subject to bias that affects their judgement. As coaches, we too have biases. Among the most common biases are:

- **What makes an effective leader**. They tend to overvalue action and undervalue reflection and are more likely to see leadership potential in people who are like themselves.
- **The causes of good and poor performance**. They underestimate how much they contribute to the poor performance of others and over-estimate how much they contribute to their good performance. This can lead them to seek scapegoats – and other team members often unconsciously adopt the same biases.
- **How well they are monitoring their environment**. In two studies of US managers' perceptions about sales growth, sales fluctuations and industry trends, two US academics found that more than half of the executives made grossly inaccurate statements about sales in their very own business units and about relative quality.
- **How good they and their team are compared to rivals**. They tend to overestimate their own team's relative creativity and potential to implement innovation, their industriousness and intelligence, and ethicality. (This kind of myopia is common to all kinds of people -- one study shows that most prisoners in jail perceive themselves as more than averagely moral!)

It is important for team coaches to contract with the team to how to offer feedback when these biases arise and with your co-coach as you see yours and theirs arise. As a team coach, how would you identify these and other leadership biases? Professional coaching supervision can be a great support for understanding your biases and elegantly working with them in the room.

Your thoughts

Team maturity

Another way of looking at high performance is the concept of team maturity. There are two levels to this:

- *What the team does*. How it manages its tasks, processes, behaviours and learning – whether these are at a fairly basic (or non-existent) level, a high performance level, or stale.
- *How the team thinks*. How personally mature the individual members of the team are in socio-emotional and cognitive terms and the impact that the mix of maturity levels has on the member's ability to understand and work with each other. (People at the three levels of adult maturity have very different perspectives and mental processes, so it can be disastrous, for example, if the leader is less mature than other key members of the team.)

The latter is a topic for advanced team coach education programmes, where significant time can be spent on developing the specialist ability to diagnose individual and collective maturity. For novice team coaches it's enough to know that this is an issue that may explain some team dysfunction and to be sufficiently alert to the concept to call upon specialist expertise, if needed. With regard to what the team does, however, the table below is a useful diagnostic tool. Work through it with colleagues to identify signs you might look for to establish the level of maturity on each of the aspects listed.

The team coaching framework

In this section we look at the overall team coaching framework, from the time you are asked to look at a team, to the end of the assignment. Though we will cover this in order, this is a non-linear process. If a team is ready for team coaching and has their issues defined, a typical team coaching assignment would involve up to 8 sessions with the entire team over the course of six to twelve months. Reflecting on a team, which you are familiar with, discuss in small groups how you would approach each of the seven steps below. What conversations would you need to have and with whom? Please see the Appendix for a blank version of the framework for your use.

Key steps in the team coaching engagement

Step	Team coach's action	Team's action
1. Preparation	Establish what performance means in this context Establish how ready the team is for coaching	Consider willingness and readiness for coaching
2. Scoping and contracting	Clarify goals and timescales How will we measure the outcomes of coaching? Map the principal barriers and drivers to: -- goal achievement -- coaching effectiveness	Understand and commit to specific performance goals – task, learning and behaviour
3. Process skills development	Help the team acquire basic skills of learning dialogue	Commit to and practice skills of learning dialogue
4. Coaching conversations	Lead the coaching dialogue	Create reflective space – calm time for coaching dialogue -- calm time for subsequent reflection, individually and collectively
5. Process review	Briefly review coaching process at end of each session Review in more depth every third session	Consider and give open feedback about the coaching process Consider how they can make it more effective
6. Process transfer	Assist team to take more leadership of coaching conversation	Take more leadership of coaching conversation Increasing emphasis on peer-coaching and team self-coaching
7. Outcomes review	Assist team to evaluate what has been achieved through coaching Give feedback on team's presentation to more senior management	Take responsibility for the outcomes of coaching and reporting them back to more senior management.

The preparation stage

Readiness for coaching

Thinking of a team you are familiar with, complete the questionnaire below. What do the scores tell you?

Consider how you might use this with a team:

- Would you ask them to complete the questionnaire as it is?
- Adapt it (if so how)?
- Discuss the questions in open forum?
- Work through the questions in one-to-one interviews?
- Not use it at all?

How ready is this team for coaching?

1. Do the team members have positive experience and expectations of coaching?
2. Does the team see team coaching as both urgent and important?
3. Does the team have an appropriate mix of complementary skills, relevant to its expected outcomes?
4. Are the team members genuinely committed to becoming a high performing team?
5. Are the team members – including the leader -- committed to open and honest dialogue?
6. Are they – including the leader – willing to challenge themselves and each other?
7. Are the team leader's motivations for introducing team coaching transparent and accepted by the team members?
8. Is it clear who is in the team and why?
9. Is team membership likely to change during the period of the team coaching?
10. Is the team willing to address and review its purpose and priorities?
11. Do team members genuinely want to collaborate rather than work in silos?
12. Does the team meet at least monthly?
13. Do team members accept responsibility for their own and their colleagues' learning and development?
14. Is the team adequately resourced (in terms of money, time, information, etc) to achieve its goals?
15. Is the team prepared to invest time into coaching sessions and into implementing necessary changes?
16. Is the team willing to address internal conflict?
17. Is the team prepared to address poor performance by individual members?
18. Is the team manager prepared to undertake personal change, to better support team performance?
19. Is team coaching supported by key stakeholders outside the team?
20. Are there any other significant barriers to making team coaching work?

Score 1 (Strongly no) to 5 (strongly yes)

Your thoughts

What does performance mean for this team?

Consider the following questions in the context of a team you are familiar with and try to answer them as honestly as possible. Consider also *What evidence do we have to answer this?*

- Do we know who our customers are? (Internal and external)
- Do we know what they want and need from us? (And do they know?)
- What's the quality of what we deliver? (Is it what they want/ need?)
- What reputation/ brand do we have with them?
- What do we do now that reinforces or undermines our reputation/ the quality of our work?
- Do we know specifically what needs to improve and how?
- Do we know what we are going to do to deliver those improvements?
    - Resources
    - Skills + competencies
    - Processes
    - Communication
    - Behaviours
- How will we know if we've succeeded or failed?
- Do we understand the difference between efficiency and effectiveness? (What are we doing efficiently that is hindering our performance?)
- Are we clear about which influences on our performance are within our control / influence; and which are not? How can we move the latter, so we can influence them?
- What have we not considered that might affect our performance next year?

Another approach is to ask the team: What are the five or six things this team has to do really well, to achieve its mission (as defined in Hawkins' model of team performance – see page 33). Ask team members to write their lists individually, then share them. Your role as a team coach is to help them come to a consensus about what the priorities are and how they relate to the mission.
What range of responses would you expect from a team, with which you are familiar?

Your thoughts

How would you help the team come to a consensus?

Your thoughts

In what other ways would you prepare yourself and the team for team coaching?

Your thoughts

The scoping and contracting stage

A central issue in team coaching and essential in contracting is clarity of responsibility. There are typically four major stakeholders in externally resourced team coaching: the team; the team leader/manager; other team members (i.e., apart from the manager); and the sponsor. Issues that need to be foreseen and managed include:

- The team leader's behaviour or competence may be one of the primary reasons for poor team performance – hence there is a potential for conflict of loyalty
- The team and the leader may have different agendas, as may the sponsor
- Many teams are in fact composed of sub-teams, with considerable variation in their willingness and ability to collaborate – and with different agendas and priorities.

Contracting with the team leader

Consider the questions:

- *What conversation would best help you to understand the leader's intentions, motivations and fears?*
- *What commitments might you require from the leader and what might they need from you?*

Your thoughts

Contracting with a sponsor

- What conversation would help to ensure the sponsor is supportive and realistic in their expectations of the coaching intervention?

Contracting with yourself

- What can you do to protect your own well-being?
- How will you manage your own expectations?
- How will you manage boundaries?

Exercise: What contract can you set with yourself?

Your thoughts

Contracting with the team individually

Consider the questions:

- What conversation would best help you to understand each team member's intentions, motivations and fears?
- What commitments might you require from them and what might they need from you?

Your thoughts

Contracting between team coaches

You and your co-coach must role-model being an effective team. In contracting with each other, you may wish to consider, for example:

- How you will introduce yourselves and each other
- When and how to take over from each other
- When and how to make each other aware of a dynamic in the room
- How to observe and give feedback to each other
- How to work with each other's strengths and support each other's weaknesses

- How you will prepare for each session and how you will debrief after each session
- What you need from each other to feel confident

Your thoughts

Contracting with the team collectively

Consider the questions:

- *What conversation would best help the team contract together about how to make team coaching work for them?*
- *What contract might they need from you?*

Your thoughts

The role of the sponsor

Team coaches tend to be brought in to work with teams either by the team leader or, more frequently, by a more senior person, to whom the team leader reports. This latter person, usually referred to as a sponsor, may well have a different expectation of the team coaching process and the intended outcomes than do the team and/or its leader. Sometimes the HR function may be used as an intermediary between the sponsor and the team coach. It is important to insist on a conversation with the sponsor direct, because:

- The HR professional may unconsciously put their own spin on the assignment

- Sponsors often reveal far more to a coach, who knows the right questions to ask than they may to an internal HR person
- There is no hierarchical pressure between coach and sponsor

Clarifying expectations with the sponsor is vital in gaining their support and establishing a realistic picture of what can and can't be achieved through team coaching.

Contracting with the sponsor

Contracting with the sponsor tends to be mostly about an open conversation with the coach – ideally without other stakeholder's present, so they can be less guarded.

A typical contract might include the following:

[Coach] is employed to support the team in addressing a range of issues related to its performance, with particular but not exclusive reference to [topics]. The specifics of the conversations between the team and the coach, and between the leader and the coach, will remain confidential. The team will be encouraged to contract with the sponsor with regards to measurable outcomes they aim to achieve, and to the nature and frequency of feedback to the sponsor.

The coach guarantees to maintain confidentiality of all information derived in the pursuance of the team coaching assignment. It is not the role of the team coach to provide an opinion on the team, its members or its leader(s).

The sponsor is responsible for:

- Agreeing with the team and its leader the performance improvements sought from team coaching. These will be balanced between achievement of measurable targets, behaviours and systems improvements that support higher performance, and building the team's capability and capacity to address future challenges
- Supporting the team and its leader in addressing both the internal and external systems that influence performance

Using diagnostics

We have already encountered some diagnostic tools, which you can use to help the team understand itself and its context, and to identify issues to work on. There are others in the Appendix to this workshop. You will also have instruments that you already use in one-to-one coaching or other learning situations. It's advisable not to overload teams with questionnaires – that can create unnecessary resistance from the start. Better to start with one or two general ones, to pinpoint issues to work on, then to use other diagnostics to help the team understand its own dynamics later on in the assignment, when the questionnaires can be related to specific issues you are addressing.

In the space below, list diagnostics relevant to team coaching, along with what would be best time and way to use them.

Diagnostic tool	When and how would you use it?

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6. Process transfer	Assist team to take more leadership of coaching conversation		Take more leadership of coaching conversation

			Increasing emphasis on peer-coaching and team self-coaching
7. Outcomes review	Assist team to evaluate what has been achieved through coaching Give feedback on team's presentation to more senior management		Take responsibility for the outcomes of coaching and reporting them back to more senior management.

Additional reading

Using PERILL to explore the temporal orientation of the system

Temporal orientation describes where a person, a team, and organization or a society focuses their attention – towards the past, the present or the future. All three are important. The past provides us with lessons, from which we can learn in the present and future. Present focus is what enables us to get things done. Future focus is about envisioning and preparing for where we are going.

Here's an example, drawn from several real cases and a little imagination. Wine World is a retailer of wines. It has a few traditional shops but does most of its trade on-line. It has built up a customer base of people, who rely on its recommendations. The company was acquired two years ago by a traditional grocery retailer, as part of that organization's strategy to rely less on large stores. From the start, it has been clear that the new owners do not fully "get" Wine World's business and several key technology investments, which would have allowed the company to offer more individualised services, have been held back while the parent company invests in yet more acquisitions, including on-line grocery delivery.

Let's look at the temporal orientation of the top team at Wine World and of its stakeholders and influencers. The executive committee entered into the takeover in the belief that the new owners would support not only investment in technology but a project that would link customers to selected wine producers, creating a three-way relationship, in which the company would add value to both parties. Their focus is divided equally between the past (maintaining the values that make customers trust us), the present (growing faster than the competition) and the future (the vision of the producer-company-customer triangle).

The customers, however, are focused primarily in the present – what is the deal on offer? A minority are also future oriented, concerned with acquiring wines to lay down and mature. The customers typically have some interest in the past, because they like to think of themselves as informed buyers with refined tastes and some understanding of wine-making. This sometimes influences their choices towards long-established vineyards with a sense of history.

The suppliers to Wine World have a similar temporal profile to the company, in large part because the Exco has sought out partnerships with traditional, quality wine makers, who have their own strong visions for the future.

The new owners are desperately trying to become future focused but struggling. Most of the managers are deeply rooted in large store retailing. They regard the "click and collect" services, where goods bought online can be collected in store as a nuisance that interferes with the smooth running of the traditional business. However, the predominant time focus of these managers is not the past but the present. Food products go rapidly out of date, unlike wine, which may increase in value as it ages. What matters and what all the reward systems are based upon is the sales and profit margins this week. Future thinking is delegated to a small strategy team, who meet quarterly with the Exco.

The mutual frustrations within this broad system become obvious when seen through a temporal lens. Wine World's balance of time horizons is well-adapted to its market and its supplier relationships. Its plans to build bridges between vineyards and customers show a similar balance. However, as a company it is now embedded in a system, where there is a very different and largely incompatible narrative. As a small cog in this giant wheel, its ability to change the wider system is negligible. The parent company is not going to achieve a more balanced temporal focus in the short term or perhaps ever. It is unlikely to listen to a subsidiary, which does not fit the prevailing culture.

So, what can the Exco of Wine World do? The temporal orientation of the system it finds itself within is essentially poisonous to this business. The conversation that needs to happen with the parent company is one that explores how to find a more temporally compatible owner. This may or may not result in a continuing relationship as a supplier.

Among the lessons from this example:

- Understanding the systems and key drivers, such as temporal orientation, provides clarity about what can and can't be changed
- Temporal orientation is important to explore in any relationship between teams or organizations. In many cases (for example, between past-oriented teams in accounts and future oriented teams in market strategy or new product development) being aware of each other's orientation allows for accommodations to meet each other's needs.