

Alison Whitmire: Hi. I'm Alison Whitmire with Learning In Action. I'm really thrilled to be with you today to talk about team coaching with a pioneer in that field of team coaching, Alexander Caillet. I'm going to have him a proper introduction in just a moment. Our intention for this particular podinar today is to talk about how team coaching is a completely different separate unique modality from every other type of team development. It was eye-opening. I got to hear Alexander present at the Capital Coaches Conferences. It was eye-opening for me to see how uniquely defined team coaching is, and I hope you're as fascinated and captivated as I was.

Alison Whitmire: We're going to talk about how team coaching is similar in some ways to individual coaching as a one to one coach. That really helped me attend and attune to team coaching in a whole different way. I'm like, "Wow, I can use my skills as a coach to be a team coach?" So, that made this work more accessible for me. We're also going to talk about framework for both the engagement of a team coach, team coaching engagement, and they actually doing a teamwork itself, the work as a team coach and what that looks like. They were going to go into a case study, an actual case study of one of Alexander's clients.

Alison Whitmire: We'll talk through beginning to end. Why did they hire you? What did you do? How did it go? I'm really excited for you to see that. Something I think you will not have seen before. Then we'll talk about what could go wrong. How do you handle it when the leader goes off, or the team shuts down, and what do you do? So, I'm excited to talk to you about that. I'm grateful to be here with my team today. Kris Harty, Director of Brand and Community Customer Care. Hi, Kris.

Kris Harty: Hi, everyone.

Alison Whitmire: Thank you. Kris is going to be moderating today. She's going to be behind the scenes, but she's going to be watching the chat, and watching the Q&A, and helping us stay on track. Corrie Weikle, our Director of Training. Hi, Corrie.

Corrie Weikle: Hi, all. Hi.

Alison Whitmire: Thank you for being here. She's also going to be behind the scenes. She's going to be monitoring the chat for any technical issues you have, or any questions you have, that she can answer about, I don't know, anything behind the scene so that Kris, and Alexander, and I can stay completely focused on providing you with great content, and hopefully a great conversation. So, thank you very much ladies. Appreciate you.

Alison Whitmire: So, what the heck is a podinar? Well, we made it up. It's across between a podcast and a webinar. It's interview style like a podcast and interactive with you our audience like webinar. By the way, I just wanted to say thank you all to you who, when you registered wrote in a question for us, or something you

were curious about, because we really do use those questions to shape the flow of our conversation. So, thank you much for that.

Alison Whitmire: Why do we do these podinars? It's our way of giving back. We had a genuine support for people who do this transformational change work, whether it's on an individual level or a team level. We want to bring you thought leaders like Alexander to inform you, to inspire you, to do you even more fully with maybe even more tools in your toolkit. That's why we do what we do. How do you interact? You can chat with everyone by going down to the chat box. If you want just the panelists to see, that's Alexander, and Kris, and Corrie and I. If you want just us to see your chat, you can have it say, "Just all panelist."

Alison Whitmire: If you want everyone to see your chat, and everyone does want to see your chat, you turn it to all panelist and attendees. If you want to ask a question, you can do that in the Q&A box. Alexander and I will address that question. Now, as best you can, make the question adjustable and pretty clear. It's hard when we're in this conversation to have a great big like world piece question. If we can narrow it down, that increases the likelihood that we'll be able to address it as the way that I think you might like.

Alison Whitmire: Then finally, we'll be participating in polls. Kris is going to put up a poll right now. The way you participate in poll is the poll pops up, and you just submit your answer. Kris, if you would go ahead and put up that poll. While you all are polling about how familiar you are with team coaching, I'm going to introduce our guest, Alexander Caillet.

Alison Whitmire: Alexander is a true pioneer in this field of team coaching. He's worked with more than a 120 teams in over 30 countries for over the last 22 years. What you're going to hear today is that the result of a white paper, or necessarily heads down, I guess ivory tower kind of research. What you're going to hear today is the result of doing these lots, and lots, and lots of times, and observing it, and noticing it, and finding ways to create framework throughout to make it better.

Alison Whitmire: He is the CEO of Corentus. He is on the faculty of the Georgetown University's Institute for Transformational Leadership. With that, Alexander, I'm so thrilled to be with you today.

Alexndr Caillet: Hi, Alison.

Alison Whitmire: Hi. Thanks for joining us.

Alexndr Caillet: Thank you for having me.

Alison Whitmire: Yup. Okay, so I'm going to share the results. It looks like 38% of, can you see that Alexander?

Alexndr Caillet: I can, yes. That's-

Alison Whitmire: Okay, so 38% how I coach teams, right.

Alexndr Caillet: Okay.

Alison Whitmire: The rest are either fairly familiar or somewhat familiar. We've got a good 20 plus percent barely or not familiar at all with team coaching. It's a great cross section.

Alexndr Caillet: Great. Thanks.

Alison Whitmire: Alexander, how did you get into team coaching? What do you love about it?

Alexndr Caillet: It's one of my favorite questions, because the answer actually how did I get into it is threefold. I think ultimately, I got into it because of early childhood experiences, difficult experiences with groups. Having been more of a nomadic type childhood, moved around a lot, I found it very hard to get into groups. So, I was always the outsider. It wasn't easy. Then when I entered into the professional world, I found early on in my 30s that a lot of my performance reviews were one-sided. I'm really good on results, and work, and being able to do the work, but pretty bad-sided in the terms of working in teams, leading teams, or being a colleague.

Alexndr Caillet: I was noticing in my early 30s that I was having trouble working with teams. Then lastly, I was asked to work with teams themselves in our client systems as a consultant. I kept noticing that in terms of working with teams, I had a couple levers in my disposal team building, which was gains, facilitation where I ran the meeting, or consulting, which was advice. Coming out of my graduate work at Columbia at Teacher's College in Organizational Psychology, I'd been through hoop dynamics work. I was wondering, "Why aren't we working with these teams in realtime?"

Alexndr Caillet: I think all that came together for me in my early 30s to really become a pioneer in this field.

Alison Whitmire: Yeah, I love that. My next question is around how team coaching is different from some of these other team development modalities? I'm going to put up this slide that illustrates that point, so you can speak to it.

Alexndr Caillet: Thanks. This is a very simple slide. There's a lot behind it, but I think this is a really important point. I want to preface it by saying that we at Corentus bring one point of view to the field. It's only one point of view. It's not the right point of view, but it's been getting a lot of positive feedback lately, because what we're finding that the field of team development is getting confused about what team coaching might be and not that.

Alexndr Caillet: We got to work on this and came up with this idea, that there's a field called team development at large. That field encompasses a whole series of modalities, or we might call ways that you actually work with teams. We distinguish four. There was more than four, but these are ones that our clients enjoy. They enjoyed, because they've been a bit confused lately as well. There's a modality called, "consulting." This is a modality by which a professional might come in and give advice, best practices, research, and actually tell the team what it should do or could do.

Alexndr Caillet: It's legitimate, and there's a lot of need for consulting, but we don't think it's enough. The facilitation modality is one by which the client team calls the professional and to actually guide the work session. You have power of the pen, you own the room, you structure good methodologies, and you can take a client through that process to get an output. Very legit and helpful may be not enough. Training is what it means. It's training and team building, taking a team through a set of skill, or knowledge building sessions, curricula, good design, simulations, role plays, legitimate and helpful, but not sufficient we feel.

Alexndr Caillet: It comes this fourth area we call, "coaching." For us, it has a very specific parameter. When we go into coaching mode, which by the way could be interspersed with the others, in coaching mode, we now enter a place where we watch the team do real work. They're doing the budget. They're building the operational plan. They're going through the sales pipeline. As they work, we take a very quiet observer position and watch them do that. We gathered data, as you'll see an example later, and then we feed that data back to them through either the coaching question, or data and question for them then to hear the data and do something with it themselves without us needing to fix it, drive it, or manage it for them.

Alexndr Caillet: That's really coaching. We actually engage in a coaching conversation using data with the team realtime as they do real work.

Alison Whitmire: What I so appreciate about that is training and facilitation, and consulting all have their place, but what it's clarifying for me at least, now I'm just saying with us is that in a way they're artificial constructs. Not to say that that's, they're bad in any way, but it's like, "Okay, there's a dialog being facilitated, or I'm being told what advice what to do, or I'm being trained on how to be better." None of that is happening while I'm actually working, while I'm actually doing the work of work.

Alexndr Caillet: Maybe can I push back a little bit on what you say-

Alison Whitmire: Yeah, please do.

Alexndr Caillet: I know, because this is the conversation. How much were there artificial? I think I know where you're going, right? I think what they do is they provide a very valuable service to attain, very valuable. What they tend not to do is create a

sustainable system of self-regulation, because often times what you'll find is the team comes back to the consultant, the facilitator, the team builder to do it again. In essence, it doesn't allow the team to ingest what you're observing so that it can make its own modifications much like coaching does an individual coaching. Is that a fair pushback?

Alison Whitmire: Yeah, absolutely. To me, it begins to get at the difference and the outcomes of these modalities.

Alexndr Caillet: Right.

Alison Whitmire: Yeah, because my sense is that with team coaching, the goal is that they do it themselves only better when you're gone versus these other modalities.

Alexndr Caillet: There is that. Right now, you're in the middle of a budgeting exercise, and you're noticing that you can't make a decision. The coach calls that out in a neutral manner. It's right there and then that the team will make a decision, either through a touch of teaching which you may do, or just working through its own ways of decision making. Because it actually makes a decision in the moment around the budget, the learning retains itself, because there was a real benefit or payoff to the actual implementation of that action.

Alexndr Caillet: That right there, I believe does more for sustainability than an analogy then you then have to transfer back to real work later.

Alison Whitmire: Would you describe any of the part of what you're doing into coaching as almost like experimenting with new behavior?

Alexndr Caillet: Yeah, it's a great question. I think it is. A lot of teams will tell you when you're a team coach that they've never done something like this before. The idea that you would stop a meeting and have them observe themselves in the middle of a meeting, or have a leader observe themselves individually is pretty shocking at first. It drives a sense of curiosity through self-observation that has the client want to experiment with what's possible. What could we do? Then realize it they actually have their own solutions. These are very wise people. These are seasoned executives.

Alexndr Caillet: It's almost like because we give them the permission to look, that they're able to experiment themselves, and we call a method, or a tool, or way of working that they implement there, and they actually put into practice. So yeah, it is an experimentation, but I like to say that the client starts to experiment with it.

Alison Whitmire: You're beginning at least into my ears, beginning to talk about some of the similarities between the one on one coaching and team coaching, would you say more about that?

Alexndr Caillet: I would. This is something that many folks who go through our training programs would come see our conference simulations, kind of getting "ah-hah" about, because when they realize that when they see as due to the coaching was they go, "Oh, you're actually having a coaching conversation not with one, but many people." It's exactly what it is. In coaching, we are observing our client. We are having conversations that are predominantly inquiry based. We're coaching the person not the problem. We're in deep listening mode. We're actually not using a methodology, but going with the flow of conversation. That's what we do in team coaching. We let go of the methods.

Alexndr Caillet: We have a lot of frameworks. We let go if they need to fix it. We coach the team. We listen. We ask questions, and we go with it, which means that by definition, there's a lot of permutations here, but it's not one, many. For those folks who really love coaching, this is an exciting game. We call it the X games of coaching, like the extreme sports, because it's one thing to coach one. Coaching a conversation with A people is a pretty amazing experience, right?

Alison Whitmire: Yes. It's challenging enough for me to coach one person.

Alexndr Caillet: Right.

Alison Whitmire: Yeah. I so appreciated that. What I'm imagining is that some of the competencies that are really useful for individual coach like presents, and creating trust and intimacy, and holding a space are really useful for a team coach.

Alexndr Caillet: Yeah, I think you find a lot of the competencies that are present for individual coaching very healthy yourself. It's a presence, a clear state of mind, inquiry, really noticing your own scripted conversations, not getting caught up into the problem. I might say to you, actually, you'll see in our model in a moment, we put a big emphasis on the state of mind and being. When you're in a room with six to eight people, I find our set of unconscious biases, but also our insecurities, our ability to get triggered by one is doing, or saying, or looking could be augmented.

Alexndr Caillet: I personally have to really launch my inner trigger around I'm not adding value, or I'm not appreciated. Because if someone's not looking at me, or I notice someone may not be agreeing with me, I can very quickly fall into that trap and start to get caught up and insecure, and then all of a sudden think to myself, "I have to add value. I have to add value. I want to fix it," and I start to do things that are out of sequence, ill-timed, and more about me than the client. That's a trap. I still fall into it.

Alison Whitmire: Oh, and that's another way of how team coaching is similar to in one on one coaching.

Alexndr Caillet: Right.

Alison Whitmire: Because I feel that too. I definitely feel that too. Just for context, before we transition into our second piece here is just define what you call team, and how team coaching is different than group coaching.

Alexndr Caillet: Great question. For us a team, we ask you the depths at our definition of team from the work that Katzenbach and Smith did in the wisdom of teams back in 1996, I believe. Our definition is that a small group of people, seven plus or minus two who work in collaboration and hold each other mutually accountable for the achievement of a common purpose instead of shared goals. It's a smaller group of people. They hold themselves mutually accountable to achieve common purpose and shared goals with a clear set of collaboration methods.

Alexndr Caillet: Our distinction between group coaching and team coaching is that the team is really focused on that purpose of shared goals. They are coming together for the achievement of it. As such, they have to become interdependent, and work together to achieve it. They can no longer really be operating solely as a working group or group. They must come together. In group coaching, what we find is that it has very much of an individual component. It is very individual based, and doesn't necessarily need to take in consideration the common purpose of shared goals.

Alexndr Caillet: Both are legit, and what we'll say to you is that actually, most teams can actually operate in working group styles, or team styles depending upon the situation, but that team coaching piece is really when that group of people come together to achieve something that requires the collaboration into [crosstalk 00:19:40].

Alison Whitmire: Yeah, I totally agree with that. Okay, well let's go to Kris, and see what questions we've got from our audience. Hey, Kris.

Kris Harty: Hey, Alison. We've got a question that fits in I think right where we are from Lisa Orlick. She said, "Would you describe your role as to label the behavior realtime? If so, how often do they relabel it, because they have collective history?"

Alexndr Caillet: Great question. You'll see how we do that when we go through an example of the case. I think that's very much our role. Our role is to provide very neutral feedback on specific behaviors that we're observing that are in alignment with what they want us to observe. One of the areas of team coaching is the idea of focusing. Less is better than more. If all you do is focus on the idea of making agreements for a while, that's pretty good. In the role of agreements, there's language, fuzzy agreements, clear agreements, soft ask, clear requests. We can look at behavior, give our definition of it, clearly have them understand of what we're looking for.

Alexndr Caillet: They may relabel it. They may restate it in language that they have, or given their history what they know. That's fine, as long as they understand it, that's what counts.

Alison Whitmire: Whatever they call it.

Alexndr Caillet: Whatever they call it.

Alison Whitmire: Yeah. Kris, do we have other questions?

Kris Harty: We do. We have a couple questions. One was already answered from Maryann Boyle, what are the differences between individual coaching and team coaching. I think we've answered that fully. Lisa Orlick also asks, "Do you integrate learning and action techniques into your team coaching work?"

Alison Whitmire: Interesting. I'm not sure that Alexander knows what learning in action techniques would be.

Alexndr Caillet: Yeah, I was going to say, what's the definition?

Alison Whitmire: Thanks for asking. I'm not sure I know exactly. Oh well, we have a way of getting to the root of what we call issues around team performance by understanding the internal experience of the team, and the ways in which the internal experience of the team may be causing them not to trust each other, or maybe causing them to take on more responsibility, or less responsibility and so on. We get a composite of what the team looks like, what their internal disposition is.

Alison Whitmire: It would be super interesting to put the two together. It like when, "Okay, here's the internal experience," so then how is that internal experience showing up in behavior in ways that may or may not serve the mutual purpose of the team?

Alexndr Caillet: What's interesting is I think if we say the answer to that question until we get to our sensing framework OPN, I think you'll find that we are very much in the internal experience, but not just of the individuals, what we call the collective internal experience, the collective norms who try and spoken that people are falling into by virtue of being in that system.

Alison Whitmire: Oh, that's good.

Alexndr Caillet: We're differentiating two, and sometimes the dissonance between my internal experience and what I'm trying to tend to a collective experience can create some schisms, or another set of behaviors.

Alison Whitmire: Cool.

Kris Harty: We have a clarification from Lisa as well. She is saying, "Also, do you integrate action learning, which is another technique into your team coaching one?"

Alison Whitmire: Yeah, I was trying to figure out, what is Lisa talking about? Okay, got it. I don't know what action learning is.

Alexndr Caillet: Yeah, there's so many definitions of it. Can we get a definition of it maybe from Lisa?

Alison Whitmire: Yeah. Lisa, we want to know what your definition is, but we'll come back to it. Is there another question, Kris?

Kris Harty: That is it at this point. Yeah.

Alison Whitmire: Okay. Thank you, ma'am. Okay, so going into a little deeper in section two around, okay what is the framework? Okay, so someone's engaged you. What is the engagement framework? Then we'll talk about what the framework for actually working with the team, because a whole lot happens before you actually get to working with the team. What does that framework look like?

Alexndr Caillet: What happens before the actual first aider with the team might fall into the categories of OD, consulting, and facilitation. We believe in doing quite a bit of upfront work before you can get into that room. That involves meeting the stakeholders. If there's a sponsor different in the team or team leader, meeting the team leader, interviewing the team members, doing some light surveys, teaching some frameworks, and really getting an understanding of who's the organization? What's their philosophy of teaming? What's this unit about? What are some of their challenges? What did the team members say?

Alexndr Caillet: We come in with quite a bit done. Then we take all that we learned, and we bring it to the team. They get to then give in what we feedback to them, select what they want to work with. We call that contracting and staging.

Alison Whitmire: The team as a whole chooses what they want to work on based on I guess you've done some analysis on what maybe what some of their challenges are, and maybe what those other streaks are, and then you feed it back to them and they say, "We want to do that."

Alexndr Caillet: This is the first time they tell us we're different, because we just feedback to them the data we gathered in interviews and surveys and maybe a day of observation, but we feed it back neutrally without recommendations or assessments, and then they take their data, and they begin the process of self-regulation then. They'll say to us, "We have so many consultants come in here with their recommendations." You are letting us figure it out. That's what this is. You have to figure it out from the beginning. That's the first step into the coaching mode, and a lot of our clients really appreciate that.

Alison Whitmire: What comes up for me is just how in those other modalities, and again, I'm not intending to cast aspersions. It's like there's amount of shouldness like in those other moda- like you should, I know, and you know, and you should. What I'm so appreciating is how you start with approach of an acceptance of this is where you are, and there's not a should or shouldn't. There's just you showing up in what you want to do.

Alexndr Caillet: There are number of organizations today that are doing team coaching, but what they're doing is they're doing a very clear assessment that has a very clear point of view as to what is first, second, and third. Then they teach you how to facilitate the method to get to that. We have a lot of frameworks, what's called the team wheel that has basics. You would think, "Well, first start with trust. After trust, you do accountability. After accountability, you do conflict." What if what you start with is managing meetings? Maybe get a couple points on the board and do some task related work first. Get them to bank to the decision making, and do trust later, who are we to say?

Alexndr Caillet: There is an innate wisdom in teams, and there is a place they go to that we can follow along with. Now, we can nudge and test, but you might find often times that the team has a wisdom of its own that we begin to trust. They're resilient, they're resourceful. If you go with it, you might find yourself on the right path, and that's an act of faith at some level.

Alison Whitmire: Okay, so now let's talk about the model you use for team coaching. I've got a slide just to anchor the conversation.

Alexndr Caillet: Okay, so this is what happens then when you're in the meeting. This is what happens when you start to do the actual coaching. This model has been honed over years. It used to be a lot more complex. We look at three pieces when we do our work, and when we train others. First is idea of being. We experience this work is being challenging, and potentially very tiring. We want to make sure that our state of mind is clear, that we're well-fed, hydrated, oxygenated. There's a whole piece of work around who we being, but also are we clear enough of mind not to get triggered, caught up, and lost in our triggering thoughts?

Alexndr Caillet: There's quite a bit of work on centering and grounding, and that's smack in the middle of the model. On the left hand side, that is what we call sensing. Sensing is our ability to in the moment, gather data, capture data, and put into a framework that allows us to then feed it back to the client. We do it using scripted charts, data charts, and you'll see a couple of examples in a moment. It really helps us to understand what we're looking at. Finally, we jump in, and we make moves.

Alexndr Caillet: We ask questions. We'll get data and ask questions. Then making even sensing really becomes the cycle we live in. Sometimes we sense longer, make fewer moves, sometimes more moves, and less sensing. The fact is, is that we are going to spend sometime sensing, which means we're going to show up more quiet. In the early stages that can seem a little disconcerting or off for clients who are used to a very active facilitator.

Alison Whitmire: Okay. Let's see. Okay, I think that's all we want to do for now. Okay, so let's go to our audience, and Kris, and see ... So, that's a high level overview. We're

going to take a deeper dive with the team, but what high level questions are we having?

Kris Harty: We have a number of good questions. First, I'd like to just provide Lisa Orlick's definition of action learning, so we can all learn a bit if you'd like.

Alexndr Caillet: Yes.

Alison Whitmire: Yeah, I'd like to learn.

Alexndr Caillet: I'd like to learn.

Kris Harty: All right. Action learning is a process that involves a small group working on real problems, taking action, and learning as individuals, as a team, and as an organization. It helps organizations develop creative, flexible, and successful strategies to pressing problems.

Alexndr Caillet: Right.

Alison Whitmire: That sounds good. Yeah.

Alexndr Caillet: That's the definition I would use, and that's an actually a process that I've used often when I'm asked to do training with teams and groups, is instead of having them do simulations is you bring in a real problem. Often times with LGL group training or scrum training, it's a real problem we solve before. As they take action, they actually implement and learn the behaviors. I think this is like a realtime action learning, because they're actually doing real work to begin with.

Alexndr Caillet: By virtue of them being in a budget, or the strategy, or whatever succession planning exercise they're in, you're stepping into their real meeting, so by definition, they're doing real work. You're sitting and observing them in their real element. So by definition, it is a form of action learning, although it's not a process you set up, because it's already set up by virtue of the fact they're already doing it. That's the distinction.

Alison Whitmire: Yup, makes sense.

Alexndr Caillet: Yup.

Kris Harty: Boy, we have about four really good questions. Next one I would say is from Jamie Turner, "When would you like to be invited into a team-based on their maturity?"

Alexndr Caillet: On their maturity?

Kris Harty: Mm-hmm (affirmative)

Alexndr Caillet: Yeah, so this is a great question. So, I'd go to the Tuckman team life cycle of forming, storming, norming, performing. I'll add two phases, dorming and transforming. One would think that we get called in a lot of storming, and it's true. Teams starts to get into conflict intention. There are many calls that say, "Hey, come in now." You'll get fewer calls during performing for obvious reasons, sometimes in the early norming phases, the sense you want to go quicker. Sometimes at launch time, you get, let's help us form.

Alexndr Caillet: Interestingly, I have noticed that many times, we get called into dorming. Dorming is the post-performance stage where the team has had a period of success, and now they're a little stagnant. There's group think. They're stagnant. They're not holding each other accountable. A lot of longstanding executive and management teams fall into that category, and it does feel like they can't move on. Maybe there's an elephant or two in the room, someone on the team that needs to be like, "Go."

Alexndr Caillet: The leader of the team says, "We need to shake things up, because we have a lot coming." Interestingly, we get called a lot then. As that looks for transformational event would call us into work with them as they do the transformational event.

Alison Whitmire: Right, yeah. I can totally imagine that. I could totally imagine that. Right, Kris, another question and we'll move on?

Kris Harty: Sounds good. This one is from Laurel Forst. She asks, "When you feedback the data collected in your assessment, is that fed back anonymously to the team?"

Alexndr Caillet: This is a good question. It depends what the data is about. Yes, when we do general behavior charts, or OPM charts as they're known, we'll feed it back anonymously as a collective. The team did this many interruptions, or we're noticing this pattern. However, in our tradition, we are allowed to coach an individual directly in public in front of others including leader or subgroups. With permission, you may say, "Hey Jane, can I give you some feedback? I noticed that you ..." Then give data.

Alexndr Caillet: That's a ways down the road once we've built the rapport. Our early moves are with leader alone or team. Then with time, the team becomes comfortable with having individuals. Then they start to do it themselves. When they start to self-regulate that way, we are dismissed, which is actually [crosstalk 00:33:29].

Alison Whitmire: That's so great. Just hearing you talk about it feels so vulnerable. I'm just like, "Wow, it requires a lot of courage for a team to do that and a leader now to do that."

Alexndr Caillet: I know on this podinar I have a couple clients who are here. I'm sure if we ask them what the experience was, vulnerability definitely comes to mind I'm sure.

Alison Whitmire: Oh yeah. Anyone who's doing that had stopped. We hear a lot today about conscious leadership, and importance of conscious leadership in this world. I think conscious leadership requires vulnerability. Just so acknowledge anyone who's willing to do this work.

Alexndr Caillet: Alison, in our posture, that being circle, I have a client who once in front of a large group was asking, what made Alexander an effective team coach? This client said, "He's vulnerable and kind." I thought that was so interesting. In our work, we have to hold these teams as sacred. Arrogance and ego, and our need to know and fix, I don't think have a place here. I think we have to hold the space of respect and be very kind to ourselves, and also show some vulnerability. We're human. I let them know when I don't know. I'd let them know if I make a mistake. You're with human beings here. That's I think what wins the game.

Alison Whitmire: Yeah, you just said what I was thinking, which is how important us coaches, whether we're working with teams or individuals, how important our internal experience is to the experience of the client.

Alexndr Caillet: Right.

Alison Whitmire: Yup. Let's get into the third piece on the case study. I'm trying to share that, here it is. Okay. The OPN.

Alexndr Caillet: Sure. How much time do I have for this, Alison? To be sensitive-

Alison Whitmire: Listing. What if we took 10 minutes? We could go all the way 12.

Alexndr Caillet: All right. I'm going to summarize the case itself, and just show you a bit of data and tell you what we did. This is a publishing company located in the Mid-Atlantic states of not share their name, and I've changed the names of the players. This is an organization that called us in because of a couple of factors. Number one, they needed to launch a new platform, a digital platform, which was causing them a lot of internal strife. There was some higher turnover rates in the organization. The team itself was experiencing some conflicts and a lack of trust.

Alexndr Caillet: The main thing is they felt ineffective. Meetings were going on too long. They weren't making decisions, and they didn't feel they were, "teaming." I got a call from the head of HR. We met, did interviews, and we began to work together. I worked with them for a year, showed up at many of their meetings including, I believe it was four offsites, and did a lot of data gathering ahead of time and also during.

Alexndr Caillet: I've shared this chart with you to go back to an earlier conversation, but also to prepare the next chart, which is as I said into those first meetings, I'd started to sense. What I'm sensing for, and what we sensed for at Corentus is really three

levels. You start to notice what are called the patterns. What patterns are the team in? This word "patterns" is very important. Patterns of communication, patterns of decision making, patterns of accountability, patterns of goal setting, patterns around purpose.

Alexndr Caillet: Focus in on a set of patterns, observe gathered data, and start to notice, have those patterns that are leading to outcomes. Those are fairly consistent. Pattern X leads to outcome X. You start to notice that the outcomes they want probably on happening, because the patterns are what they are. Then we start to sense for and guess what are some of those norms that are underneath the surface both at a cognitive and an effective level that are driving the patterns.

Alexndr Caillet: For example, the pattern is people show up late to meetings. The outcome is meetings that would start on time. You know, we're starting again. The norm is the internal thought is I can be late, nobody cares, and nobody's going to call me out. It's very simple example, much more complex than that. This is what we're sensing for on a consistent basis.

Alexndr Caillet: Let's go to the next slide.

Alison Whitmire: Okay.

Alexndr Caillet: This next slide gives you an example of one snapshot in time. They really wanted to figure out what was going on with them as a team. This is a singular chart that I want to explain to you that shows how we were gathering certain types of data, which led us to make certain moves. This the team, they're called, "The ELT Executive Leadership Team." This is a biweekly meeting. The date was June 19th of last year. It's a three-hour biweekly meeting, and I was charting for 15 minutes during a topic called, "Rolling out the version three digital platform," a very contentious topic.

Alexndr Caillet: I'm sitting there with the team. We have the chart itself. You'll see on top there, Paul, Anjelika, Megan, Kailia, Bernard, and Derick. The names have been changed. COO, SVP HR, CEO, SVP Product Management, SVP IT, CFO. You put their names there. On the left hand column then, I start to look at and start to measure certain behaviors. The reason I want a conversation patterns is that they wanted me to. They knew that something in their conversations didn't feel right. I picked a few things. I said, "Okay, I'm going to count every time somebody makes a statement, I'm going to put a tick mark. That's the communication at."

Alexndr Caillet: Then because I knew that they weren't really good as they said about making good request, I start to count soft asks, things like, could you, would you, might you be able to, could we perhaps do that versus clear requests. I then heard from them that they were not good at asking questions, so I started to measure questions. Number of questions they asked, and the number of questions they asked that were answered.

Alexndr Caillet: There's a double counting system here. The communication X on top are double counted either as soft ask or questions. I get this chart after 15 minutes. What do you get? You get to notice that Paul, Megan and Bernard, Bernard's running the session, seem to talk the most. There's a 119 statements made in 15 minutes for about two and a half a minute.

Alexndr Caillet: For the first who strikes me, there is a three people seem to talk more than the others, and that's a pattern I saw meeting after meeting that Bernard, Megan, and Paul tend to talk about things all the time, leaving Derick, Kailia, and Anjelika out. I've been looking soft asks. There is about 18 soft asks. One clear request. In the tradition of could you, would you, maybe perhaps, no surprise that there are very few agreements ever made in those decisions. They'll look at questions, 13 questions out of a 119 statements. That's about 11% of statements that are questions. Seven of those questions are answered for 50% rate, so I don't know.

Alexndr Caillet: Interesting number of questions and about half of them get answered. Paul spoke 29 times, Anjelika 6, Megan 40, Kailia 11, Bernard 24, Derick 9. Furthermore, I noticed two patterns. Few agreements or decisions are really ever made, and whenever there's a difficult conversation, they take it "offline."

Alison Whitmire: Don't want to get messy together.

Alexndr Caillet: Now, I have data. For my clients, this is premium real estate, as I like to call it, they love this. Because I now personal have data. What do you do with this? Back to the earlier question. I may say to them, "Interesting." In terms of the past 15 minutes, may I share with you some data? I noticed a 119 statements of which was the 24 plus 40 plus 29 is a certain number, really were made by three of you. What do you think of that? All of a sudden, they go, "Oh, that's interesting. Who are the three?" I say, "Well, who do you think the three were?"

Alexndr Caillet: A very interesting thing happens is they start to become, "Derick might say yeah. I'm sure I'm not that person." A conversation happens, and really rambling, "Does this make sense to you? What do you want to do about it?" By the way, there is this thing called soft asking I'm noticing. Oh yeah, we do that. We're not clear about what we're asking each other. What do you want to do about it? Questions, I counted 13 of 119, about 11%. Is that good or bad? I don't know. Is it good or bad? Is it serving you or not? That's the return.

Alexndr Caillet: "Oh you know" says, Anjelika, "I think we should ask more questions." "Why," says Megan. Another having a conversation, I may say, "What do you think of this conversation? What do you want to do about it?" By the way, I'm noticing that when you have difficult conversations, you take it offline. Yet, we don't really do that here. I may say, "Let me give you a point of view, a point of view is that in teams, difficult conversations are okay." Actually, interdependency requires difficult conversations, so it's something you may want to learn maybe.

Alexndr Caillet: We'd love to learn that. Don't know how to do it. Want me to teach you? Let me teach you. Then you can learn it and do it yourselves. That's the game. By the way-

Alison Whitmire: It's so weird, yeah.

Alexndr Caillet: Yeah, we are in the middle of talking about the version 3.0 digital platform, so it is heated. Bernard really needs, he's the head of IT, he really need this to happen, but in this meeting, he should probably be speaking more with Kailia as an assessment as product manager, Kailia's right on top of this, but Bernard goes to Paul. They start to see this little geometry called, "Bernard, Megan, and Paul," and then geometry is getting in the way of a broader set of interdependent conversations, which they not become aware of and can start to fix themselves.

Alison Whitmire: The behaviors that you decided to take data on, how did you determine those?

Alexndr Caillet: Yes, so that's a combination of things Alison. One is in the interview process, in your initial observations, in a conversations you'll have, you're going to hear about this. The team tells you about we don't listen, we interrupt each other, people monologue, people, how the introverts never get a chance. There's gender bias. You hear a lot in the interview. You go in with an idea. Then as you watch the meeting, you start to notice the behavior happening. I track it and then say, "I'm noticing this. I couldn't and I start to track it then." As I go, I pick up as I go, and I'll bill an inventory. By the way, at the end of a couple of months, I may have observed 10 to 12 behaviors.

Alexndr Caillet: I'll do a baseline and share with him, and then I'd measure it again and again two months down, three months down or the next meeting for that matter.

Alison Whitmire: I'm curious maybe not necessarily in this instance and other instances how often you may be hear a justification from the data.

Alexndr Caillet: Say that again?

Alison Whitmire: I'm curious how often you hear, "Well of course, I only talk to Paul and Megan, because what does a CFO know about the digital platform? What does the head of HR know?" I'm just wondering how often, not necessarily in this case, but how often you hear a rationalization or a justification for the rightness of the data, and ultimately their behavior?

Alexndr Caillet: You will hear that. I think there's different types of justification. One is absolutely legitimate, which is context, which is I'm looking at this, I'm doing this, and then you hear Derick say, "Yeah, but I'm not really involved in this conversation. I didn't call anybody out." Remember that this is a generic feedback, but you might hear something like, "Well Alex, in this particular case, this feels about right, because the context and situation is that it's really the

three of us talking." So, I'll back off and say, "Okay. Maybe I missed the context or the situation."

Alexndr Caillet: Sometimes you'll hear a justification, which is more defensive. More defensive and it's really justification. In which case I'll say, "Do you want to share that with the team, because it's not about me." When that gets directed, because the facilitator typically takes that. When I gently like the ball of Tai chi gently say, "Is that something you want to share with the team?" Then the conversation changes and someone may say, "You know what? I think Alex is on to something here." That's when you get a spark where maybe for the first time, the conversation has had that hasn't been had.

Alexndr Caillet: Not always. By the way Alison, sometimes we do things like this, which don't work. What ill time, we're not doing it right, we make a mistake, we step our foot in, we'll be sure stepping in. We upset something. This game we're doing here also has an edge to it. The client may not be happy with what you did. Maybe you opened a box that you shouldn't have. So, know that and know that it's not always smooth. Sometimes we have to say sorry, and sometimes needs to get cleaned up. That's just like in coaching, you can't predict that.

Alexndr Caillet: When I'm a facilitator, I can predict my steps pretty well here. I can't predict always as well.

Alison Whitmire: Yeah. No, you know what comes up for me is just the idea that occurs in individual coaching too, which is meeting the team where they are. Maybe working with their edge, but not too far behind it. Yeah, so do you want to share the outcome?

Alexndr Caillet: The last piece?

Alison Whitmire: Yeah.

Alexndr Caillet: Sure. I share this with the folks on the call today, but I think people say I'm okay. I get maybe you're looking for behavior charts, and patterns, and not everything is a chart like this. Sometimes you're just writing the patterns. What do you do then? What are the moves about? So, the next page shows all of you a very simple framework called, "The 6 Box Model." This is a way that we keep ourselves in the guardrails of what we're trying to do. Now basically, through our questions and our data sharing, we're helping the team observe its patterns in the current state. What patterns are you working on? Those that support you and are good for you, and those that you feel perhaps don't support you, and just started to make mental links between the patterns you are adapting and the outcomes you're producing.

Alexndr Caillet: This is an important piece of self-observation work. Then perhaps what are some of the norms that are underlying? The team after all starts to employ this language, and starts to notice what's working and not to then help them say,

"What are the other patterns you'd like to adapt? What would you like to do differently? What are tools and methods and ways of behaving that you would like to do? By the way, I may have a couple suggestions for you or couple tools to offer you. Take them, use them, try them, and see if those one get you the outcomes you're looking for. By the way, are there new norms or ways of thinking you have to adapt? If so, what are those? How will you implement those?"

Alexndr Caillet: This model, many of our clients begin to understand, begin to adapt the language, and begin to see that actually what we're trying to do here is really to be in service to them as they need to get to the right patterns to get the outcomes they're searching for. The patterns are effectiveness, the outcomes are effectiveness, performance are cohesion, or any other set thereof.

Alison Whitmire: Upon getting this, you're starting with, "Okay, the norms are this, norms, or values, or-

Alexndr Caillet: Beliefs.

Alison Whitmire: ... beliefs, yeah, underlying beliefs are these. What of the mindset, values, beliefs, we made this shift to create different patterns and that result in different outcomes.

Alexndr Caillet: That's exactly right. Quick example, you find a team that has a hard time making decisions or being innovative, or making agreements, and you start to hear in the collective underlying experience that risks are dangerous here. Making mistakes will cost you your job. Speaking out of term is, it's not helpful. You start to hear, and some of those norms come directly from the organizational culture. Some come from the leader, and some come from the ethos of the function or the team. Those lead to patterns where you deflect difficult conversations. You don't quite go to agreement, et cetera.

Alexndr Caillet: The outcome is that the team keeps languishing in, we don't make decisions, we don't take the risk. For a team to uncover that, and to make a decision on what if we actually did take risks, what would we have to believe or what's the new assumptions of pretty powerful exercise?

Alison Whitmire: I'm so appreciating what you're saying and how some of the lack of clarification of teams, clarity of teams comes in the norms. I'm reflecting on a couple of clients I've had, where one of the underlying norms is like, "We're a family company." I've worked with this company that was a seven generation, 7th generation family company. They're like, "We're a family company. We treat each other well." What a family company is like, that means a lot of different things, a lot of different people. How it was showing up in patterns was poor performance was tolerated. It became an obstruction to the mission of the company.

Alison Whitmire: I could see how going in and like yeah, we're a family company and there's some positives to that, and things we want to have pulled, but maybe we're making a whole lot of assumptions about what that means that aren't really what that means.

Alexndr Caillet: I love that example. One that's similar to me is I worked with a large NGO, very well-known around the world. What they then covered as a norm is that in this organization, everyone has voice. It's a beautiful norm. What that led to is endless consensus, and then ability to make decisions. When they had a new norm called, "Voice does not equal vote," and vote is earned, then a clarity came upon them that, "Oh, voice is not vote, therefore I can have voice, but then maybe I don't have vote," which means it's not always consensus. It can be authority with consultation.

Alexndr Caillet: There was the pattern. They went from consensus, everything to some chance, well, we'll just do a 30 with consultation, and the outcome was quicker decisions. You know what? The organization loved it, because people actually getting frustrated, the decisions were being made out of this voice for everyone, voice is not vote, vote is authority with consultation. You still have to throw him a voice. It's not just the vote, you get a new outcome called, "Quicker decisions and actually more leadership." So, another example.

Alison Whitmire: Yeah, norms are where just occurring as we've ta- where a lot of stockiness can occur, and teams, and those norms aren't really examined and clarified, yeah. Kris, let's go to our last round of questions here before we close.

Alexndr Caillet: This is [inaudible 00:52:55].

Kris Harty: Yeah, we have a ton of questions and comments. Yeah, people are loving all of this. From Mary Boyle, we have, "Do you work with teams in developing a social contract or ground rules for the team?"

Alexndr Caillet: This is interesting. Yes, but it's not for me to do. In a facilitator mode, you create the ground rules upfront or the list of norms. I found that most often times, there's a stock in the drawer and never visit it again. I believe that the best way to create rules or norms is as they go. As you happen to-

Alison Whitmire: As you work with the team.

Alexndr Caillet: When they happen upon a "dysfunctions" that they don't like, you make the move on it, they realize they need to make a fix, then they create their own norm in the moment about that. It has a, I don't want to use the right multiplier, but I'll say at least three or four times stronger effect than doing it in the moment when something had happened versus the ubiquitous list of what we all know to be the ground rules and norms and just end up in the drawer, just like so many vision sickness.

Alison Whitmire: That's good. There's so much more likely to remember it.

Alexndr Caillet: Yeah, it hits.

Alison Whitmire: Understand why it's important.

Alexndr Caillet: Yeah, and it's not for me to say, "You need a social contract." It's for the team to discover it.

Alison Whitmire: Yeah.

Alexndr Caillet: By the way.

Alison Whitmire: Yeah, that's great. Kris, other questions?

Kris Harty: Yes, we have one from Karen Fenstermocker. She asks, "Do you ever get feedback that doesn't get your role? Do you think they're doing it all, which is what the outcomes should be, but they don't understand that, that that is the point."

Alexndr Caillet: I'm not sure I understand the question.

Alison Whitmire: I think I get it. At some point, do they go like, "Why is Alexander here? Because we got this," which is at some point, it's the goal.

Alexndr Caillet: Yeah, so after a while you realize that you probably don't need to be there anymore. That's good. I think in the early days, there are sometimes because you're being so quiet, by the way, in a given day, you might also facilitate a little bit. You might do some trainings, some teaching, some consulting, so it's a mix of things. When you put on that coaching hat, they're watching and go, "What's he doing?" Then they may be wondering, "What the heck is this?" If you ask that powerful question, you'll get it, but there are some teams that don't buy into external facilitators or coaches that don't want the help, that really believe they can do it themselves. That's legitimate.

Alexndr Caillet: If they don't see the value, there's probably a conversation to be had at the table. I'm willing to have any conversation with any team about my role, and I make that available to them. I've been challenged openly in a meeting. It's hard, but I think that's a worthwhile conversation. They need to challenge me as well. That's a fair game.

Alison Whitmire: Yeah. Are you pretty explicit about the hats you're wearing and you'd state it, "Okay now, I'm putting on my facilitator hat to everybody," so it's not just inside your head like you're saying it.

Alexndr Caillet: I'm explicit about two things always. The hats I'm wearing and asking for permission a lot until they tell me, "We got it Alex. No more hats."

Alison Whitmire: Shut up about the hats already.

Alexndr Caillet: Shut up about the hats. Of course I'll say you know, and they'll say, "Why are you doing that?" Because I say, "The reason I'm doing that is because I employ very different skills, and when I employ those skills, you may have a different interaction with me about it. They start to realize, "Oh, when he's in coaching mode, he's quiet. Facilitation mode, he stands up. In consulting mode, he's giving advice." They start to learn that after a while, they get to transition, they don't need me to call about.

Alison Whitmire: All right. All this. We're our in our last few minutes here.

Alexndr Caillet: I know, [crosstalk 00:56:48].

Alison Whitmire: Which I know. I can't believe this went so fast. A few things. So, we always want to know from our attending audience how we did, what you like, what you didn't like. Kris, will you launch that poll on how you'd, the extent to which you'd recommend this to a colleague? That's our net promoter score of how we're doing. If you want to know more about what we do at Learning In Action. Actually, it is a really interesting tie and what Alexander does and what we do, which is we help individuals and teams get to the root of their potential performance challenges by providing them a roadmap of their internal experience under stress and relationship.

Alison Whitmire: When relationships get lobby, what's going on inside of them? What are the emotions they experience? What thoughts they experience? How empathetic are they or how trustful are they? That's a little bit about what we do if you want to learn more about that. We have a free introductory little podinar type thing we're going to do. Kris is going to put the link to that in the chat box now. We're calling it, "Introduction To Relational Intelligence." It's a new way of thinking about emotional intelligence with individuals and with teams. That's on March 22nd, a month from today.

Alison Whitmire: We've got a training coming up in Vancouver real soon. We have virtual certifications launching. Anyway, you can find out more about all that at learninginaction.teachable.com. Let's talk about what's going on [inaudible 00:58:45]. If you are as fascinated and in love with what you heard today as I am, this is what you can do to learn more. You can see Alexander on LinkedIn, on Twitter. You've got his email here. You've got the website. He's now accepting applications for his team training program. I met a graduate of one of his team training programs, and she is loving what she's able to do with teams now.

Alison Whitmire: We're going to send you as a thank you for attending a digital copy of Alexander's introduction to team coaching, Corentus style. Then you could find out even more about that and some really interesting articles on this topic by going to corentus/heartandresults and entering the password, "heart&results"

here. If you're not catching all of this right now, that's okay. We'll be following up with an email to you with the recording, if you wanted to see here and have it again, and with all this information. You'll be getting this all via email. If you want to connect with me, here's all my information, how you can get in touch with me, how you can learn more about Learning In Action, and the trainings we do.

Alison Whitmire: The next podinar is next month with Dr. Simon Western. This was a recommendation we got from our listenership, our engagement audience here. Dr. Simon Western has a field called, "Analytic Network Coaching and Eco-Leadership." What that's about, and I want to understand more from him what it's about, is it's the idea of creating for leadership what he calls a "network mind," where he has developed an ability to coach leaders to distribute their leadership throughout their entire organization. So that leadership, decisions doesn't just happen on the top, and then it's like, "Okay, you do all this."

Alison Whitmire: It's how do you take leadership, ideas, and principles, methodologies, and distribute it throughout the entire organization. That is what we're going to talk with Dr. Simon Western about on the next podinar. You'll get a link to how to register for the next podinar in the email that I'll post. Okay? So, sign-up. Thank you so much Alexander for a really fun hour together. I appreciate you and the work you're doing. Your clients are so lucky to have you. Thank you, Kris. Thank you, Corrie. Thank you everyone who tuned in today. We're so happy that you did. Until next time. Bye.

Alexandr Caillet: Till next time. Bye.