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# Feedback as a Unit of Work

## A Data-Driven Approach to Organizational Coaching

By Claudy Jules

Business transformations of unprecedented scale and complexity are a pressing issue for many companies. The market has changed and in order to maintain a competitive advantage, businesses need a cadre of leaders who can set clear direction, mobilize the energies of people throughout the enterprise, foster a performance culture, and most importantly, lead others through times of great uncertainty. As a result, the field of organization development is seeing an increased demand for senior leaders who demonstrate critical leadership attributes like self-awareness, integrity, and judgment.

This article describes how practitioners interested in coaching leaders to meet today’s business challenges can benefit from using both organization development and the integrative body of knowledge described as Gestalt Organization & Systems Development (OSD)<sup>1</sup>. To accomplish this, I discuss the importance of combining soft, observational data with hard and analytical data to a coaching engagement. I use a case study to illustrate how the Unit of Work, a Gestalt OSD conceptual frame, was used to design and facilitate a feedback and organizational coaching process. A summary of lessons learned as well as my personal reflections are discussed.

I have been struck for some time that despite the alignment between organization development theory and practice, and Gestalt OSD, not much has been written about the application of Gestalt OSD as a data-based process driven by not only observationally-relevant data, but also

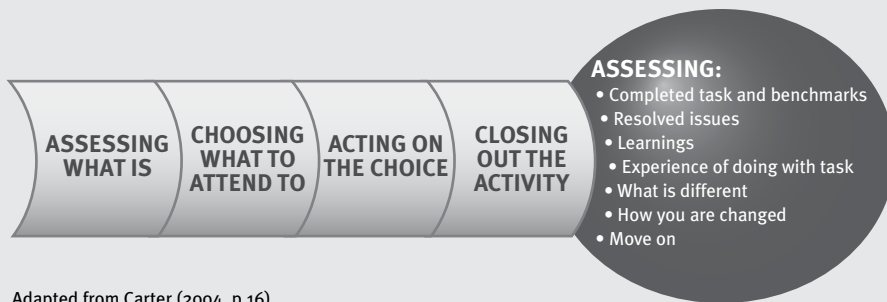
some form of a personality assessment and multi-rater feedback survey. If organization development is a data-driven process, one conclusion ought to be painfully obvious: there is a gap between the organization development field’s “scientific” stance and how as organization development practitioners we make sense and use of our immediate experience. From my vantage point, Gestalt OSD has not gained the respectability it deserves and as a field of practitioners, we have not sufficiently legitimized its applications beyond process-based interventions. This article is an effort to close that gap—to demonstrate the importance Gestalt OSD has in the content and process of consulting to organizations involved in transformations and in developing leaders.

This case study centers on the investment an executive vice president, responsible for one of the largest divisions of a North American resources company, made in his extended leadership team. This executive was charged with preparing his executives in its largest division for significant transformation. This executive vice president was under enormous pressure to juggle a number of strategic and company goals. These goals made it imperative for this executive vice president and his senior leadership team to rethink their operating model and to transform how they do business.

To realize a successful outcome, the executive vice president felt that one way his division could meet the challenge was by investing in leadership. This would be accomplished by having his extended leadership team use the transformation as

Figure 1: Unit of Work

## UNIT OF WORK SCHEMA



Adapted from Carter (2004, p.16)

an opportunity to take ownership of their learning to learn from their immediate and every day experience, work as teams to solve real-life challenges affecting their business, and receive developmental coaching to hone their leadership skills.

To develop leaders capable of leading transformation effectively requires two elements. First, the leadership strategy needs leadership assessments that measure personality attributes and multi-rater input; assessments of how individual leaders learn; forums that allow leaders to work on real business issues and apply what they learn back-on-the-job; and a support system (e.g., leadership coach, peer coach) able to speak their truths and provide varying degrees of personal support.

Secondly, the leadership strategy needs an organizing framework to support a structured coaching process that provides feedback to leaders on their leadership strengths as well as their areas for continued growth. This allows the individual leader and the coach to engage in productive discussions and critical reflection. Creating a process for knowing how to enact the coaching relationship is just as important as knowing what to coach on. Therefore, the discussion also helps leaders enhance the characteristics that can support the organization's transformation and understand roles which best fit the individual leadership profile. This dual balance requires attention to the "what"—aligning personal aspirations and values with the organization's strategic intent—as well as an attention to the "how." To actualize this approach, the leadership coaching sessions rests on five elements, including:

- » the establishment of the scope and nature of the coaching relationship

- » a discussion on one's leadership aspirations and motivation
- » a review and integration of psychometric assessments to paint a complete picture
- » key discussion of strengths and areas for development
- » a commitment to next steps

### Case In Point

My colleague and I<sup>2</sup> developed a feedback and coaching process to support individual leadership development plans and interventions. In particular, plans and interventions centered on helping the individual develop an awareness of her/his leadership style and behavior; choice and acceptance of the consequences of their behavior; and the responsibility for where these consequences have an effect either on the individual leader or the transformation.

John Carter, President of the Gestalt OSD Center, describes the Unit of Work as having four steps: 1) assessing what is, 2) choosing what to attend to, 3) acting on the choice, and 4) closing out the activity (Carter, 2004), *Figure 1*.

**Step 1**—assessing "What Is" focuses first on describing how the individual leader and coach will work together in the feedback session. The coach describes the coaching process to ensure that details such as outcomes, expectations, confidentiality, and the length of the coaching session are agreed to before moving on. The individual leader is asked to share a brief history about their recent work experiences, what they are involved in today, as well as their future aspirations. This is followed by helping the individual leader understand their innate tendencies, comfort, and

stretch zones. The second focus of assessing "What Is" encompasses analyzing the variance between the individual leader's aspirations and her/his current reality. It targets the individual leader's personality assessment results. Here, the coach discusses the purpose of the assessment, what it measures, and engages in a discussion around what rings true and what does not for the individual leader. The discussion is put into the context of motivations. That is, what leaders believe will impact what they are committed to learn. After the individual leader and the coach review the personality assessment results, the coach then begins to review the individual leader's 360-degree results (inter-focus) and makes connections back to her/his personality results (intra-focus). To further build the individual leader's self-awareness, the coach engages the individual leader in a discussion around four perspectives illustrated through a JOHARI window<sup>3</sup>. Specifically, areas in which the individual leader's perception of her/himself is the same as their raters' perception. This is followed by a review of the areas in which their own perception is different from that of their raters'.

**Step 2**—the selection of "Choosing What to Attend To"—defines the "What is" picture in more detail. The individual leader begins to discuss their key aspirations and motivations that feed into their development plan. The individual leader then begins to move into where they want to focus. This conversation is supported by the individual leader identifying the top two to three developmental opportunities that will enhance their performance as a leader. These opportunities are based on each of the four JOHARI window panes. For example, the coach helps the individual leader identify qualities they have to develop, such as developing others or becoming more detail-oriented at skills they need to master going forward. The results of the learning style assessment are then used to address the developmental opportunities for the individual leader to focus on. Together, they identify how the individual learns can be a source of continuous support to facilitate behavior change and attain goals.

**Step 3**—"Moving or Acting on the

Choice”—focuses on specific actions that the individual leader can commit to take action on and behaviors that can be exhibited and entered into his/her development plan. The outcome of this discussion is a planning sheet that not only helps the individual leader identify some immediate next steps they'd like to start, stop, and continue between now and the action learning workshop, but other related experiences to get the most out of the program. As such, the coach provides a written summary of the discussion to the individual leader to use as input to his/her personal learning strategy.<sup>4</sup>

**Step 4**—“New What Is / Closing the Unit of Work”—The individual leader and the coach begin to bring closure to their discussion. This is done by the coach asking the individual leader to describe what's different for them as a result of having gone through the feedback session. The coach extends verbal support by reinforcing their aspirations—an anchor throughout the discussion—by restating what both she/he and the individual leader arrives at as a common understanding of the strengths and areas for development. A confirmation is made between the coach and individual leader about the areas requiring development and which are relevant to the individual leader's role in leading change.

It is also important to note that the Unit of Work for effecting change is also rooted in traditional organization development theory and method. Specifically, this process is supported by Argyris' (1970) belief that there are three primary tasks of an interventionist (organizational coach): 1) the generation of valid and useful data; 2) free and informed choice by the client; and 3) an internal commitment to the choices made. By assessing what is, the primary task of the organizational coach is to collect valid and useful information from and about the individual leader. This is reflected by what the individual leader and others in the organization report in the assessment tools and during the contracting phase of the feedback coaching discussion. Second, by focusing on what to attend to, the locus of decision on what developmental opportunities are most important is defined by

the individual leader's actual and felt need for behavior change. This is done when a rapport is sufficiently developed and executed without any imposition or bias from the coach. By continuing to establish a clear goal or direction, the criteria for providing the individual leader with a free and informed choice on alternatives for action is established. Lastly, by helping the individual leader feel responsible for discerning next steps, they are now held accountable for acting on this choice and identifying how this learning will matter to their leadership in the future. At this point, a new end state about what is known and what remains to be learned is articulated by the individual leader. Once this occurs, support for closing out the discussion and saying or appreciating what was accomplished can begin.

#### Case In Action

**Assessing What Is.** In one of my coaching sessions, I was working with a leader who was less than optimistic about the coaching process all together. Talking about his personal growth as a leader was counter-cultural for him personally and for the organization. As such, my first intervention was to acknowledge his uneasiness about the conversation and the amount of information detailed in his assessment data. My intervention was followed by me saying, “if you don't want to talk about anything that makes you uncomfortable, that's ok. We can focus on what you have energy for.” Doing this reinforced that it was his choice. Stating this to him, helped him become more comfortable in expressing what his pressing issues and concerns were as a leader. As such, we began to engage around when his leadership has been at its best. This helped him clarify his personal aspiration as a source to anchor the personal commitment required to change his leadership behavior. Focusing on what to fix first would have limited the conversation and reduced the probability of helping him identify what he wanted more of as a leader and what he was interested in doing differently. This also helped him experience more of who he was and formed the basis for further dialogue. Next, I engaged him

in articulating his capability around the style of leadership he felt most comfortable exercising. This was followed by discussing the leadership style that challenged his performance most as a leader.

**Choosing What to Attend To.** To work these challenges, I drew from examples of his existing strengths as identified in his assessment data, rather than solely focusing on the areas that were areas for improvement. Having personality and 360-degree feedback data gave us material to work with and an opportunity to highlight his strengths and discuss how he wanted to address the gaps in his leadership as well as alter others' perceptions of him as a leader. The data highlighted what people were thinking and saying. Again, having diagnostic data and here-and-now observations of him supported our candid exchanges and resulted in what he experienced as nonjudgmental feedback. As I was working with this leader, throughout the course of the conversation I would ask him, “How do you want to lead differently? What challenges are you experiencing that prevent you from achieving your aspirations? What do you want more of that moves you closer to getting what you want?” Asking these probing questions helped me generate important information and understand his perspective and how what he was going through linked back to his personal aspirations. For example, I could see the individual leader becoming more reflective. As he thought about his challenges, he started to see the broader linkages to his assessment results and how his innate tendencies identified in his personality assessment would stretch him in some instances, and support him in others.

**Acting on the Choice.** What followed was helping this leader understand and articulate how his current behavior—both strengths and areas for development—supported him in getting the same result. In some cases, this was exactly what he needed to do more of in what he did day-to-day. In other instances, it enlarged his awareness about what he could be doing that is different from what he was doing in his current role. While the areas identified

for improvement posed new challenges for him to learn and apply a new set of leadership skills, they also provided a baseline for where and how he could begin developing a focused development plan. As he identified what he wanted to start, stop, and continue doing as a leader, I always made it a point to reinforce his strengths by using the comments portion I took note of in his 360-degree data and linking it back to his personality data as a way to heighten his awareness on traits and attributes that complemented one another. What's more is that he asked for recommendations on books to read and indicated that he had not had a chance to talk about his growth as a leader. This process in part, helped him articulate a new what is picture for himself and define what he wanted to work on going forward.

**Closing Out the Activity.** To close, I summarized a few themes and what I heard as next steps for action. In addition, I asked for feedback on his experience working with me. I also provided feedback on my experience working with him by acknowledging new insights and behavior shifts in the moment and at the end of our session. I knew from the close of our discussion that I had supported this leader through a self-discovery process, and as a result, the discussion had a meaningful impact.

### Benefits Realized

The benefits of providing leaders with feedback typically yield successful outcomes. For example, in Marshall Goldsmith Partners, LLC's study of eight thousand managers in a Fortune 100 company, they showed the benefits of getting feedback on one's leadership capabilities and taking action on a consistent of periodic follow-up produced big gains in effectiveness. Given this, it comes as no surprise that by the end of the nine-month period of the North American resources company's leadership program, qualitative and quantitative evidence revealed that efforts to improve each individual leader's effectiveness in value-added ways paid off. The positive and consistent results were based on both the coaching process and coach, as illustrated

through a program scorecard. Using Kirkpatrick's four levels of learning as a quantitative measure (Kirkpatrick, 1998), each leader's level of satisfaction with coaching was measured on 5-point Likert scale ranging from 1 (Not at All) to 5 (Very much so). As such, 95% of the extended leadership team indicated that they were "mostly" to "very much so" satisfied with the program. 90% indicated that they were "mostly" to "very much so" satisfied with the feedback process. 98% indicated that they were "mostly" to "very much so" satisfied with their coach. One participant credited the coach for being instrumental in helping them understand their assessment results and thinking in a new way. This person cited the fact that this was "by far one of the best leadership programs I have attended in my 27-year career." Because the feedback process helps the individual leader develop an action plan and take the feedback session beyond the mechanics of the process, coaching became a cornerstone of the broader leadership development program. By implementing a coaching program, the extended leadership team evolved to being more self-aware and a formally networked group of leaders.

### Summary

The organizational coaching process is neither a one-size-fits-all intervention nor a stand-alone, single event. Rather, it is an experience that yields the most impact for the leader when an organization embarks on a major change initiative, such as a transformation. This is especially true during initiatives that may not match the existing leadership skills required for the initiative. Therefore, to improve the probability of a coaching process' success, there are a number of learnings that could be beneficial to practitioners in the fields of organization development and Gestalt OSD. These learnings are listed as key considerations for coaching leaders in organizations which are described in *Table 1*.

### Author's Reflection

This article provides me with an opportunity to repay some intellectual debts to the

creators of this integrative body of knowledge and approach that has led me, and I suspect many others to explore new ways of intervening to create an awareness of "what might be." While the Gestalt OSD body of knowledge has been present for over three decades in the field of organization development, the attention on Gestalt OSD has increased markedly during the last five years. One conclusion as to why this is so can be attributed to the special issue on Gestalt and OD (Carter & Tolbert, 2004). Dr. John Carter and Dr. Mary Ann Rainey encouraged practicing Gestalt OSD faculty and graduates to contribute to this integrative body of knowledge in a way that will make a difference across all levels of organizational systems. That's the task I undertook as I began to write this article. I hope I have made what may sometimes be viewed as a conceptual schema become concrete and pragmatic.

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**Notes**

1. Gestalt OD or ‘OSD’ is “an approach to organizational consulting developed in 1977 at the Gestalt Institute in Cleveland and represents an integration of Gestalt principles, organization development, and general systems

theory” (See Burke, 1980; Nevis, 1987; Tolbert & Hanafin, 2006).

2. An organizational strategist trained in traditional organization development and Gestalt OSD (author) and Victoria Luby, an industrial-organizational psychologist were the lead consultants facilitating this engagement.

3. Based on the work of Joe Luft and Harry Ingram’s, The Johari window. *NTL Human Relations Training News* (Luft, 1961), it is a graphic model of awareness in personal relationships that uses window panes to highlight how we see ourselves compared to how others see us—a concept used to compare 360° self- against other ratings.

4. Based on Robert J. Thomas’ *Crucibles of Leadership: How to Learn from Experience to Become a Great Leader* (Harvard Business School Press: Cambridge, MA, 2008), the personal learning strategy serves as the bridge between an individual’s unique experiences, aspira-

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tions, and learning style and the skills and competencies expected of those selected to move into key leadership roles.

Table 1: Key Considerations for Coaching Leaders in Organizations

Key Considerations	Description
Make leadership a priority agenda item for the executive sponsor-in-charge.	Public commitments made to the leaders supporting the importance of spending time with their organizational coach gives leaders the confidence that the future can be built together.
Push for a leadership program that is planned and anchored by the company’s business challenges and its strategic intent.	The organizational coaching relationship and process should be set against the wider context of the organization and the challenges that the current organization change initiative or series of initiatives present.
Apply rigorous, consistent, and fact-based assessments of existing talent across the leadership ranks.	Employing scientifically valid and reliable assessment tools provides leaders with an in-depth qualitative and quantitative window into their current leadership style. It also enables leaders (and the coach) to gain insight on strengths and areas for growth that impact how key developmental areas to become more effective are prioritized.
Create a path that fosters a leader’s capacity to reflect on their actions and gain real self-insight from their every day experience.	Establishing a clear coaching road map for leadership effectiveness provides a disciplined and orchestrated approach to developing those across the leadership ranks who can use insights gained from action and reflection to effect successful change.
Use experiential learning processes to accelerate leadership skills and attributes required not only for the initiative, but for future business.	Ensure that the coaching process is appropriately positioned and executed within the agreed leadership competency model set by not only the change initiative, but by required leadership behaviors established enterprise-wide.
Link leadership and organizational dynamics to support operating model changes.	Establish a vehicle for one-on-one coaching that can run during the course of the change initiative and be reinforced as needed to accelerate the deployment of new organizational capabilities.
Measure value and impact as you go.	Develop a dashboard that focuses both on the content and process of effective leadership consulting so that one can answer the question “How will I/we know if I’ve/we’ve improved our leadership capabilities?”