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# Choosing your Coach: What Matters and When.
# An Interpretative Phenomenological Exploration of the voice of the Coachee.

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**January 2015**

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**Doctor of Coaching and Mentoring**

## ABSTRACT

In the last 20 years, coaching has enjoyed immense growth, responding to demands from organisations and individuals. Limited research suggests that clients value coaching. In particular the coachee values the relationship with, and the qualities of, the coach in their collaborative work. To aid this process many believe that effective matching should play an important role in successful relationships. However the process of matching is under-researched particularly from the perspective of the client. The aim of this study is to address this gap in the coaching literature and to respond to the practical need of organisations and coaches to gain better understanding of how coachees experience the matching process in an organisational leadership context.

Using an Interpretative Phenomenological Analysis (IPA) methodology this study explores the experiences of coachees at different stages of a leadership coaching journey. It aims to gain a greater insight into the psychological factors influencing how coachees choose their coaches and how their view on this choice changes through the duration of the coaching experience. Purposive sampling was used to identify eight leaders from five different organisations who were about to undertake matching as a precursor to taking part in a coaching experience. Of the eight participants five were men, three were women, with an age range between 30 to 55 years old.

The theoretical contribution of this research is in providing a more detailed understanding of the real experiences of those involved in receiving leadership coaching and how this perspective sheds new light on what matters to the coachee and when. A number of important themes emerged. Firstly, the different levels of understanding and meaning attached to coaching, and how the meaning attached had an impact on what coachees requested from their coach and coaching. Equally noticeable was the change in what mattered to coachees. At the start of choosing a coach, the coachee's focus was on objective requirements and concepts such as the knowledge, experience and gender of the coach. When they were experiencing coaching they had a greater appreciation of the subjective elements of the work and the relationship, placing much greater emphasis on issues such as Trust and 'Touch'. Importantly the value of encouraging 'Chemistry Meetings' to help coachees inform their decision was strongly supported in the findings. This study also draws attention to the importance of choice being offered to the coachee when coaches are being selected for them.

Overall it is argued that more can be done to empower and educate the coachee to make a more informed and thought-through decision when choosing their coach.

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## CHAPTER 1 - INTRODUCTION

In the last 20 years, coaching has been enjoying exponential growth. According to a global study conducted by PricewaterhouseCoopers (2007, p.3), with nearly 6,000 coaches in 74 countries, coaching is now a US$1.5 billion industry. A Chartered Institute for Personnel Development (CIPD) Report (2008, p. 4) states that 63% of UK organisations are using coaching and this figure is expected to continue to grow. This growth was evident in their 2011 report indicating that of those organizations that had already been using coaching , 84% have increased their use in the last few years. At a more practical level anyone who has searched the internet seeking a coach or has browsed popular management books would be overwhelmed by the range of coaching approaches, methodologies and practitioners promising inspiration, transformation and access 'to your full potential' (for example Coaching for Performance by Sir John Whitmore (2002) with over 500,000 copies sold or The Coaching Manual by Julie Starr (2010)).

However, many questions about coaching remain unanswered for researchers and practitioners of coaching. Debates revolve around what coaching is about, what factors contribute to the effectiveness of the process and to what extent the coachee can understand and influence the coaching process. Although many studies (e.g. Schmidt, 2003; Bluckert, 2006; de Haan and Sills, 2012) acknowledge that the relationship between the coach and the client/coachee is critical, very little is known about the extent to which a successful match between the coach and client contributes to this. This problem is exacerbated by a lack of studies considering the client perspective on the process of matching. This study therefore aims to address this gap in the coaching literature and to respond to the practical need for organisations and coaches to gain a better understanding of how coachees experience the matching process.

### 1.1 An historical perspective

While some authors focus on the exponential growth of coaching in the last 20 years, others (e.g. Miller, 2007) point out that the traditions of coaching are truly ancient and remind us that there is evidence to support many historical routes to the growth of coaching. Some suggest that it originated from the Hungarian town of Kocs or from Greek mythology where we find *Mentor's* relationship with Telemachus, and the disguised Athena's provision of encouragement and advice on managing quandaries of a personal nature whilst others believe it originated from Oxford University slang for the tutor who supported a student through an exam (Kampa-Kosch and Anderson, 2001; Palmer and Whybrow, 2004; Brock, 2008; de Haan, 2008).

The first peer-reviewed coaching article to appear in the literature was a study by Gorby (1937) that outlined how senior employees working under a profit-sharing plan coached newer employees on how to reduce waste and increase profits. Sporadic articles on the use of coaching continued to appear in the literature with Bigelow (1938) describing how coaching was used to improve sales performance, and Hayden (1955) advocating that performance evaluations be followed with coaching to facilitate improved productivity and sustained behavioural change. The first description of a managerial training programme that emphasized interpersonal communication skills through the use of coaching techniques was reported by Mold (1951). It was more than 10 years later that Mahler (1964) first published his research on training managers to be more effective coaches, although his work was not popularised in book form for another decade (Mahler, 1974; Mahler and Wrightnour, 1973) at which point it was in general use by management teams within major corporations. Hence, the professional use of non-athletic, non-academic coaching began within the context of business and the first client population consisted of managers and executives. The prevalent use of executive coaching as a performance tool did not occur until the late 1980s (Tobias, 1996) and was first believed to have had roots in the applied psychological sciences (Hall, Otazo, and Hollenbeck, 1999).

**1.2 The rise of coaching**

It is now widely held that coaching has rapidly become a significant part of the majority of organizations' learning and development strategies (Knights and Poppleton, 2007). This discourse takes place in the language of personal development situated in the context of organizational behaviour. The reason for some of this growth has been ongoing concerns about the lack of any real transfer of learning, the lack of an appetite for large scale off-site interventions, and a lack of sustained behavioural change all of which point toward the need for more individualized, engaging and content-specific learning, which coaching is seen as capable of delivering (Eggers and Clark, 2000; Oliverio, Bane and Kopelman, 1997).

Another explanation for the rise of coaching is that increasingly rapid job changes leave fewer senior executives in the position to fill the role of a mentor in many organizations (Lutz, 1995). Other writers comment on the trend of ‘flatter’ organizations that provide fewer opportunities for traditional mentoring relationships to develop and also result in the existence of more isolated managers and leaders (Herriot, Hirsh and Reilly, 1998; McCafferty, 1996). The exponential growth of coaching training courses and coaching providers is further evidence that coaching is part of an accepted and valued development landscape. As of May 2014, there were over 600 published scholarly papers and dissertations on coaching listed in PsycINFO. Allen (2008) commented that part of the success of coaching is due to its increasing professionalisation and Gray (2012, p.14), in summarizing the journey of coaching towards professionalisation comments that “the analysis suggests that coaching has made some important steps towards professionalisation.” While there is a growing recognition of the professionalisation of coaching, there still exist challenges in the acceptance of a universal definition of coaching that is meaningful to all concerned.

**1.3 The problem of defining coaching**

While those who work in the coaching field on a regular basis may have a sophisticated and subtle grasp of the term coaching, those who are the end users of the service have a much more limited and basic understanding. Definitions of coaching vary significantly in range and appropriateness (Palmer and Whybrow, 2005) (Kilburg, 1996; D'Abate, Eddy, and Tannenbaum, 2003). Many now argue that coaching is a cross-disciplinary methodology, and that no single industry or professional group owns it (Grant, 2008). Bachkirova, Cox and Clutterbuck (2010) comment on the array of definitions and the assumptions and theories that lie behind them and they argue that these definitions are not distinct enough to differentiate coaching from other “talking professions” such as counselling, psychotherapy, mentoring and even training. Bachkirova et al (2010) also recognize that creating a unique identity for coaching is still an “unresolved problem”. This is particularly relevant to this research as confusion over the identity of coaching can have significant implications for a coachee, in particular it may impact the requests they may make of their coach and of coaching.

Further it is worth reflecting on the issue that while the term ‘coaching” might sound as if it is straightforward and be a term that most people in a working environment would be familiar with, a number of authors (Grant, 2000; Bachkirova, 2007) recognize that confusion still exists in the minds of those who receive coaching about what exactly coaching is. The risk is that to those not familiar with coaching it can sound more like psychotherapy, mentoring, counselling or organizational development. Further confusion exists in the array of contexts in which coaching is being applied, from life coaching to career coaching, from sports coaching to parenting coaching.

**1.4 Leadership coaching**

As this research is primarily the investigation of coaching in an organizational leadership context and therefore, coaching that is described as Leadership Coaching it is important to notice how Leadership Coaching has been defined. Some examples of definitions are set out below:

> Someone from outside an organization who uses psychological skills to help a person develop into a more effective leader. These skills are applied to specific present-moment work problems

> in a way that enables this person to incorporate them into his or her permanent management or leadership experience (Peltier, 2001 p. xix).

> Coaching is the art of facilitating the development, learning and enhanced performance of another (Hill, 2007, p.9).

> It has been defined as encompassing a collaborative and egalitarian relationship between a coach, who is not necessarily a domain-specific specialist, and client, and involving a systematic process that focuses on collaborative goal setting to construct solutions and employ goal-attainment processes with the aim of fostering the ongoing self-directed learning and personal growth of the client (Grant and Stober, 2006).

> A form of personal learning and development consultation provided by someone external to the organization who focuses on improving an individual's performance (Barnard, 1938, quoted in Stokes and Jolly, 2010).

Leader or executive coaching is said to be different from other applications of coaching, such as life coaching, in that it is described as coaching with an organizational consulting perspective and capability (Ashridge Consulting). Stokes and Jolly (2010, p.252.) articulate that several factors distinguish leadership (or executive) coaching from other forms of coaching such as:

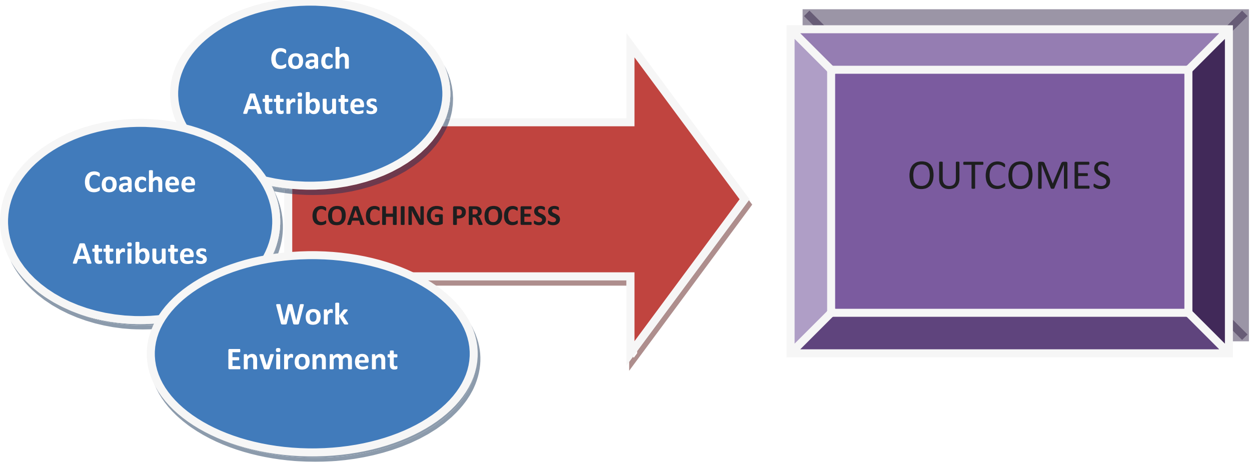
- "The main client is the organization and its multiple stakeholders not just the individual receiving the coaching.
- It often involves the intent to align the ambitions, purpose and objectives of the organization with the capabilities of the individual.
- The aim of the coaching is often informed and agreed with the coachee's line manager, and where feedback before, during and at the end of the coaching is appropriate.
- The coaches' fees are generally paid for by the organization and not personally by the coachee".

**1.5 Research into the effectiveness of coaching**

Despite the huge growth outlined earlier, research and evaluation of coaching in applied settings is widely seen as not sufficient to match the growth (Kilburg, 2000; Orenstein, 2006). Many are now starting to ask how it can be that a billion dollar industry is not able to point to a plethora of research studies to demonstrate its effectiveness or the steps required to ensure the return on investment is maximized (Rostron and Kauffman, 2008). Further, even research that has been conducted is said to be limited in quality (Kampa-Kokesh and Anderson, 2001) and is said to have problems in measuring efficacy (Lowman, 2001). Stokes and Jolly (2010) argue that asking “does coaching work” is too broad a question and that it is more relevant and appropriate to try to determine “what works, with whom, to achieve what aim, by what criterion?” (p.255). Measuring success as a leader is complex and so it not surprising that research on the outcome evaluation and efficacy of executive coaching is still in its infancy (Orenstein, 2006; Duckworth, 2010). Whybrow and Henderson (2007) point out that the varied impact of coaching may be because of any number of factors such as the differences in the coaches’ skills and abilities, how effectively coaching is integrated with other interventions, how coaching is practised in the organization or the degree of match between the coach and coachee (Hale, 2000; Cox, 2005).

Fillery-Travis and Lane (2008: p.27) reviewed the factors that have been indicated as impacting on the effectiveness of coaching and they concluded that the four areas of common findings were:

*Figure 1: Factors Impacting on Coaching*




When looking at these factors together it is important to contextualize this process in the wider system of the relationship between the coach and the coachee.

### 1.6 The coaching relationship

One consistent theme that seems to emerge from research is that the client, or coachee, values the relationship with and the qualities of the coach (making little distinction between specific interventions or models that the coach uses) (De Haan, Culpin and Curd, 2009). In answering the question “what are the common factors that are effective in coaching?” Stober and Grant (2006) propose seven themes, two of which directly relate to the coach-client relationship, indicating its critical importance within the coaching process. O'Broin and Palmer (2007: p.20) define the coach-client relationship as: "A unique, co-created, evolving relationship comprising the coaching alliance plus additional client and coach contributions".

The importance of the relationship is found in research in the related, and more widely researched, fields of psychotherapy and counselling. One of the most helpful elements in recovery in therapy is said to be the quality of the relationship with the therapy professional and how consistent and trustworthy the connection remains between client and therapist (McGrath, 2002). There are said to be a number of similarities between the coaching and therapeutic relationships with one of the foremost similarities said to be that, much like in the therapeutic relationship, the coach-client relationship involves the fostering and maintenance of a strong relationship of trust (Gyllensten and Palmer, 2007; Bluckert, 2005). The factors thought to associate with successful coaching are the relationship, empathic understanding and positive expectations (Viser, 2010; Critchley, 2012). De Haan et al. (2001; 2008; 2010) examined how various coaching interventions make a difference to clients. Over 70 coaching clients reported on the various interventions of their coaches and all strengths of interventions were compared with their evaluations. De Haan et al found no distinction in specific coach interventions of coaches, leading to the conclusion that helpfulness, as in psychotherapy, is much less predicted by specific technique or approach as it is by factors common to all coaching, such as the relationship, empathic understanding, positive expectations.

There is belief, borrowed from therapy meta-analysis (Walmpold, 2001;), that it is not the model of coaching used that makes the difference but:

1. An explicit outcome or goal
2. A sensible rationale (why coaching rather than something else)
3. A procedure
4. An ability and willingness to chance
5. A meaningful relationship

It can be said that the patient-therapist or coach-coachee relationship becomes a "crucible" of wellness or development for many reasons, but the most important may be because it is a kind of living laboratory of all relationships (McGrath, 2002).

So, as will be shown in more detail in the literature review, while there may be a lack of research into coaching, over 60 years of research in the related fields of psychotherapy and counselling is pointing to the crucial importance of the relationship between the coach and coachee. If this were the case it would be expected that a significant amount of research in the coaching field would have been focused on understanding the most important aspects of the coach-coachee relationship. However, the importance of the relationship is not reflected in the amount of research conducted so far, and there are still a number of gaps in knowledge around the relationship. Visser (2009) pointed out that “Important as the relationship is considered to be, little theory and research has as yet been devoted to the analysis of coaching relationships as *relationships*” (p. 1). Coaching theory and methodology have instead seemed to have a much stronger bias towards models, approaches and techniques, return on investment and outcome measures, where arguably, the focus has been more on what the coach does rather than on the client (de Haan and Sills, 2012).

However, authors and researchers such as Critchley, Day and Watling (2012) have looked to place relationship to self and to others, including the coach, at the heart of the coaching activity. de Haan and Sills (2012) further argue that the “relational turn” mirrors similar movements in other fields of psychological work as well as in organizational theory, sociology and the arts. De Haan and Sills (2010) continue to point out that the field of coaching has shifted in recent years from an emphasis on tools and models to making the relationship between the coach and the coachee more figural. O’Broin and Palmer (2007) point out increasing arguments are being put forward for the coach-coachee relationship to be specifically tailored to the individual coachee’s changing needs throughout the coaching contract within the individuals’ context.

**1.7 Coach-coachee matching**

A number of coach-coachee issues could be related to a more effective coach-coachee relationship, and, to better coaching outcomes. One particular aspect of the coaching relationship that is under-researched is the matching of coaches to coachees in a manner that enables successful relationships (O’Broin and Palmer 2007). “Matching” is said to relate to the process by which a coach is identified to work with the needs of a particular coachee. Arguably it involves everything that happens prior to the coaching starting, and Joo (2005, p.480) says that selecting executive coaches and matching them to the coachee “is critical in coaching effectiveness”. Wycherley and Cox (2007) point to the theme in most of the related research that stresses the importance of the matching decision and Hall et al (1999, p.58) suggest “it is an art to match temperament and learning styles for coaches and clients”. Hodgetts (2002, p.208) argues that: “selecting executive coaches and matching them to individuals is a high art and a critical one”.

The overall picture presented is that a favourable match relates to favourable outcomes (Wycherley and Cox, 2007; Gray, 2008; Lane, 2009). Matching emerges as an important factor because it is said to serve as an enabling condition or critical foundation for promoting effective relationship processes which drive positive coaching outcomes (Jackson, Boyce and Neal 2012). Matching is also said to be particularly critical in leadership or executive coaching in that it involves all three key constituents: the coach, the coachee and the organization. Extrapolating from the psychotherapy domain, it is said that half of the clients drop out by the third session and 35% don't follow up after the first appointment (Barrett Chua W, Crits-Christoph P, Gibbons MB, Casiano D, Thompson D, 2008). Although a number of factors could impact on them not continuing, one factor is said to be the quality of the relationship. Sharef, Primavera and Diener (2010) found a moderate relationship between dropouts and the quality of the therapeutic alliance which Jackson et al, (2012) argue can be seen to illustrate the potential value of matching as "a strategy for supporting the relationship and reducing client uncertainty" (p.203). Gray (2010) commented that insights about the matching process between coaches and coachees have not been given attention within the general coaching literature.

### 1.8 Matching process in action

Before looking at the research it is important to explain how the matching process works. Coaching can be seen as something that involves two main agents, the leader being coached and the coach providing the coaching and this research focuses primarily on these two key agents. However, in this context while the one-to-one encounter between the coach and leader remains fundamental, other stakeholders are also factored into the process. They include the leader's manager, who not only helps define the expectations surrounding the coaching engagement but also takes responsibility for creating an enabling environment supporting the leader's post-coaching development and success. They may also include senior management and representatives of key functions such as HR, who share the responsibility of articulating the organization's strategic objectives and consulting with the coaching effort to ensure that the coaching and strategy agendas are properly aligned.

Listed below are some simple definitions of the key agents and concepts that will be referred to throughout this thesis, and in particular in the following visual representation of a matching process:

**Coach** – refers to the individual who provides one-to-one coaching. In other "helping" professional relationships this person is similar to a therapist, counsellor or mentor.

**Coachee** – refers to the one who gets the professional service, in business often referred to as the leader or the executive.

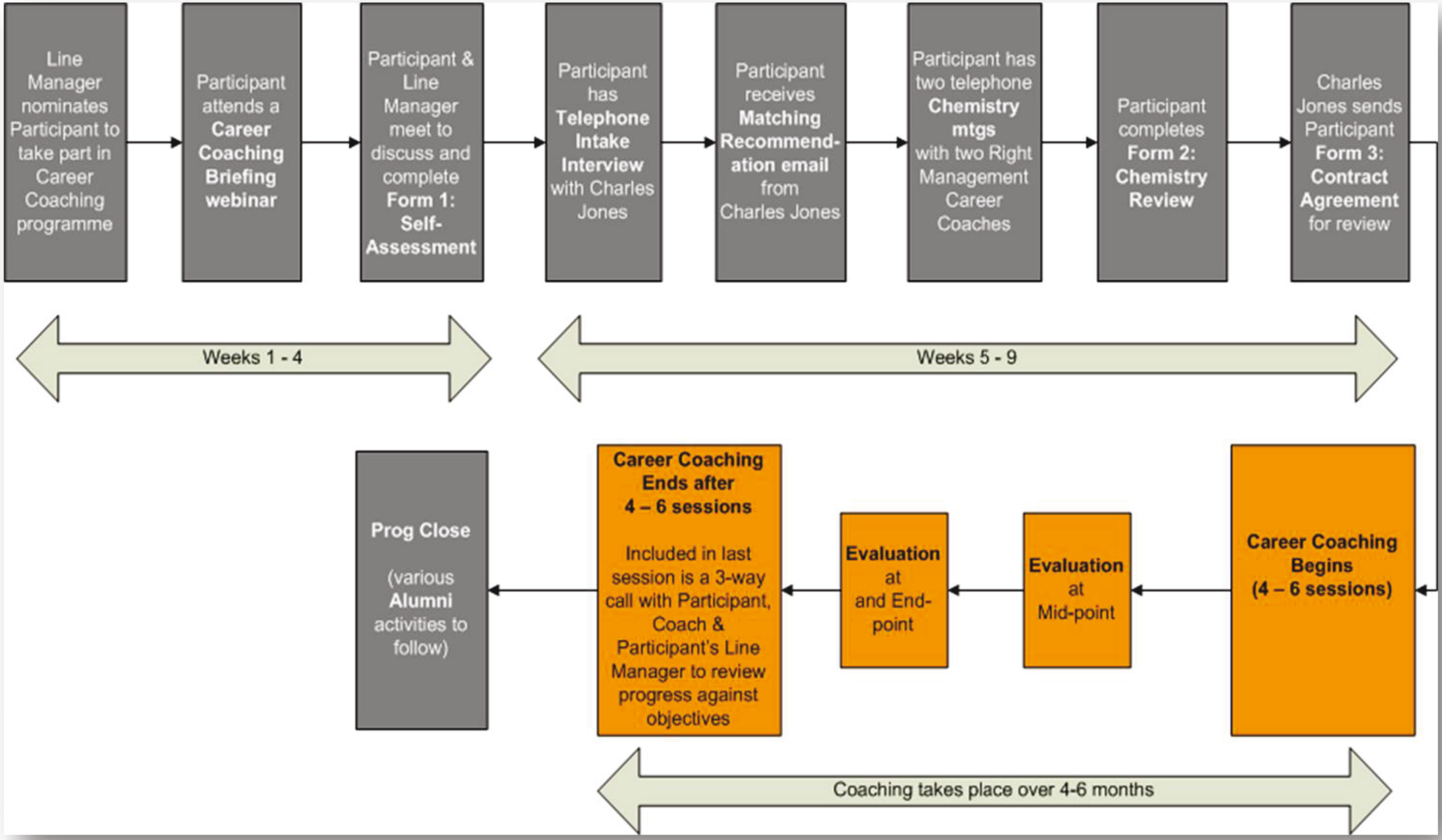
**Matching** – relates to attempts to identify a coach tailored to the individual leader's needs.

**Selection** – typically the organization selects a pool of coaches to "match" the leader's needs and proposes two or three to the leader to choose from.

**Decision** – the leader typically meets the proposed coaches for a "chemistry meeting" and then chooses which coach to work with.

There are a number of ways to position and set up a coaching programme, however, shown below is a visual representation of the typical stages in "the process":

*Figure 2: Typical Stages of Coaching diagram*


Line Manager nominates Participant to take part in Career Coaching programme
Participant attends a Career Coaching Briefing webinar
Participant & Line Manager meet to discuss and complete Form 1: Self-Assessment
Participant has Telephone Intake Interview with Charles Jones
Participant receives Matching Recommend-ation email from Charles Jones
Participant has two telephone Chemistry mtgs with two Right Management Career Coaches
Participant completes Form 2: Chemistry Review
Charles Jones sends Participant Form 3: Contract Agreement for review
Weeks 1 - 4
Weeks 5 - 9
Career Coaching Begins (4 – 6 sessions)
Evaluation at Mid-point
Evaluation at and End-point
Career Coaching Ends after 4 – 6 sessions
Included in last session is a 3-way call with Participant, Coach & Participant's Line Manager to review progress against objectives
Prog Close
(various Alumni activities to follow)
Coaching takes place over 4-6 months

In more simple terms the phases are often described as:

1. Set up: The organization agrees on the need for coaching and decides the objectives of the coaching. They may draw on a review of previous coaching interventions.
2. Choose provider: The organization chose coaching provider(s).
3. Propose coaches: Suitable coaches are put forward to the coachee
4. Chemistry meeting: Coachee, meets via telephone or face to face 2 or more coaches proposed to decide on “fit”
5. Coaching contract: Agreed between coach, coachee, line manager and others (HR, Sponsor)
6. Coaching begins: programme length, number and length of sessions can vary
7. Evaluation: near the end the success, or not of the coaching is evaluated
8. Termination or extension: depending on needs and achievement of goals

**1.9 Focus of research**

Even when research is conducted into matching in the coaching field, the research tends not to look at the issue of matching through the lens of the coachee, rather it focuses on the perspective of the coach or sponsoring organization, or even a broker service (Ireland, Hussain and Law 2006). At present any research that has been developed around matching has typically focused on the organizational perspective or looked to develop models and systems to manage the matching (Bennett, 2006; Feldman and Lankau, 2005 Wycherley and Cox, 2008). Given the importance of both the coach and coachee in the matching and the criticality of the “human relationship” between the two parties it seems limited to not focus on a more subjective investigation of matching.

To address identified gaps in the literature I will be taking a phenomenological approach to look at these issues from the perspective of the lived experience of coachees. Given that the relationship is said to be of critical importance, and given the centrality of matching and choice to enabling that relationship I believe my research will shed light on the issue from an important and under-researched perspective. Focus on this perspective will provide:

- Input into understanding of the factors involved in the matching and choice of coaches from the perspective of coachees.
- Provide an accessible, unique and informative narrative into the lived experiences of coachees.
- Provide insights that will help coachees make more informed choices/decisions.

- Provide a comprehensive review of narratives for coaching organizations with new perspectives on what "really" matters to the coachee at critical points in the coaching relationship.
- Generate further ideas for research and contribute to professional discourses and debates on the role and quality of choice in coaching relationships.
- Provide insight into the importance and helpfulness of choice in creating the right conditions for successful coaching to occur.
- Provide insight into the complex interaction between first impressions and longer-term relationship needs through the lens of the coachee.

Therefore the aim of the research is to explore the experiences of coachees in the process of choosing their coaches and how their view on this choice changes over time, with the following objectives:

1. To explore the dynamics of coachees' perceptions of their relationship with their coach at different stages of selecting a coach, and their experiences of working with their selected coach at the first stages of coaching.
2. To analyse the findings to reach conclusions about the psychological factors affecting and informing the decision making of coachees at the critical point of engaging with coaching, and with a particular coach.

**1.10 Methodological approach**

As this research is seeking to achieve deeper insights by understanding peoples' expectations and experiences and to interpret their actions and their social world from their point of view, a qualitative phenomenological approach was adopted (Bryman, 2001). This paradigm is defined by Willig (2008, p.52) as aiming to gain an understanding of how participants' view and experience their world: "the objective of the analysis is to obtain an insight into another person's thoughts and beliefs in relation to the phenomenon under investigation". It is my belief that the only way to really understand how coachees make decisions is to talk to them directly about their experience as they start their coaching experience and make choices about coaching and coaches.

Interviews were conducted with eight coachees (each person being interviewed twice, so 16 interviews in total) about to start coaching at the following three points in their journey. The interviews at point 1 (what is the coachee looking for in their coach?) and point 2 (how have they chosen their coach?) were conducted at the same time using a semi-structured interview approach. One interview was conducted to cover both point 1 and point 2 and were conducted face to face or via the telephone and lasted approximately 30 minutes. The interview at point 3 (reflecting on the coaching relationship they are now involved in) was conducted using a more unstructured or thematic in-depth interview approach and took place primarily face to face and lasted approximately 30 minutes. Interview at point 3 took place approximately three months after they had started receiving coaching.

The data collected through the interviews were analysed using an IPA method known as explicitation, as articulated by Hycner (1999 p.280). This approach has the following stages:

1) Transcription
2) Bracketing and the phenomenological reduction
3) Listening to the interview for a sense of whole
4) Delineating units of general meaning
5) Delineating units of meaning relevant to the research question
6) Eliminating redundancies
7) Clustering units of general meaning
8) Determining themes from clusters of meaning
9) Writing a summary for each individual interview
10) Modifying themes and summary
11) Identifying unique and general themes for all the interviews
12) Contextualization of themes

**1.11 Outline of the thesis**

In the next chapter the literature on the topics of the coaching relationship and matching is discussed. As research on this topic in coaching is limited, the review includes a discussion of the sources in the related fields of Mentoring, Counselling and Psychotherapy. Finally a summary is provided identifying the gaps in knowledge from current research leading, consequently, to the focus of this research.

Chapter three will explain the rationale for the chosen methodology, it will explain why other approaches were rejected and, following on from this, a detailed discussion is provided on how the research was carried out.

In chapter four findings of the study are presented and analysed. The key themes that emerged were the different levels of understanding and meaning attached to coaching, and how the meaning attached has an impact on what coachees request from their coaches and coaching. Also the change in what matters to coachees from a focus at the start on objective requirements and issues such as knowledge, experience and gender of the coach to later on a greater appreciation of the subjective elements of the work and the relationship. Over time they placed much greater emphasis on issues such as Trust and “Touch”. The value of encouraging “Chemistry Meetings” to help coachees’ inform that decision also emerged as an important finding.

In the Discussion and Conclusion chapter the findings are discussed particularly in relation to the literature that had previously been reviewed. Implications of findings are considered for both academics and practitioners. Finally limitations of this study are discussed together with suggestions for future research.

## CHAPTER 2 - LITERATURE REVIEW

### 2.1 Introduction

This research focuses on the relationship between coach and coachee and in particular it focuses on the choices that are made by the coachee during the matching process. The relationship between coach and coachee and the issue of matching does not however sit in isolation from the wider context in which coaching takes place. Therefore it is useful to contextualize the coach-coachee relationship and to contextualise the importance of “matching” as a key process in coaching. To do this it is necessary to review literature which examines factors that influence the success of coaching, it is also necessary to consider the relationship between coach and coachee and finally to evaluate literature on matching.

The sources for this review are primarily research articles on coaching. When looking at the coaching relationship and matching, the literature net widens to include the related professional fields of mentoring, psychotherapy and counselling (broadly categorized as dyadic helping relationships). This wider literature strongly supports the argument for the relationship being a critical factor in the “success” of coaching. Once this has been presented it is then helpful to look at the factors that are important in the relationship between the coach and coachee. Therefore the following section outlines what has been written about those factors before moving on to focus on one of the aspects of the relationship that is seen as critical, which is the subject of matching.

Stepping aside from the issue of matching the review includes a brief consideration of the more general issues of “decision-making” and “choice” to see what can be learned from the literature on these underlying processes’. In evaluating and reviewing the literature both the academic research perspective and practitioner perspectives was considered.

### 2.2 Factors influencing the successful outcome of coaching

There have been many articles written about what coaching is and how to coach. Notwithstanding this, a number of people (Kilburg, 2000; Orenstein, 2006) have noted a lack of published empirical research relating to how effective or beneficial the coaching process is to the individual or the organization they work for. Equally few studies have examined the processes involved in coaching (Brotman, Liberi, Wasylyshyn, 1998; Grant Cavanagh, 2004; Kilburg, 1996a; 1997; 2001; Lowman, 2005; Orenstein, 2002; Sherman and Freas, 2004). Up until relatively recently the purported benefits of coaching remained mostly testimonial in nature and a problem facing the coaching industry was seen to be a lack of empirical research supporting the efficacy of coaching. Grant (2004) argued that coaching has outgrown its current proprietary knowledge-based status, and many coaches are advocating a shift toward more research that will provide theoretically grounded, evidence-based knowledge to support it. Paradise and Mosley (2009) believe that given organizations' increasingly prominent use of coaching, understanding the conditions under which coaching works best is highly relevant. Grant and Zackon (2004) suggested that this situation was leaving the practice of coaching as an unregulated, poorly defined discipline in need of "professionalisation" and more research to justify the plethora of marketing claims. In the 62 years between 1937 and 1999 there were only 93 papers published, whereas between 2000 and May 2009 a total of 425 papers were published (Grant, Passmore, Cavanagh and Parker, 2010). In the last five years the lack of research has started to accelerate even further and an increasing number of research papers have been produced (Palmer and Whybrow, 2006; Burke and Linley, 2007; de Haan and Sills, 2010, 2011, 2012; De Meuse, Dai and Lee, 2009; Grant, Passmore, Cavanagh, and Parker, 2010; Gray and Goregaokar, 2010).

Smither, London, Flautt, Vargas and Cucine (2003) pointed out that research should examine how the impact of executive coaching is shaped by a variety of factors such as its purpose, length, organizational context, and individual differences among coaches and among those being coached.

**2.3 Coaching psychology**

Part of that growth has been driven by groups such as The Special Group in Coaching Psychology (SGCP), which was established to provide psychologists with a means of sharing research, as well as practical experiences that relate to the psychology of coaching. It is responsible for a number of key research publications including The Coaching Psychologist (TCP) which publishes articles on all aspects of research, theory, practice and case studies in the arena of coaching psychology, and the International Coaching Psychology Review (ICPR) which is an international publication focusing on the theory, practice and research in the field of coaching psychology. In a 2007 editorial for the publication Palmer and Cavanagh commented, "The growing proportion of empirical papers in this issue appears to be indicative of a growing body of research and researchers in coaching. It is this growing research agenda that will ultimately determine the place of coaching and coaching psychology in the world" (page 115).

A key summary of the state of coaching research was published was provided in 2007 by Coaching Psychologists Passmore and Gibbes.  Passmore and Gibbes highlighted what they felt were the main research projects carried out in the last 10 years. When these summaries are reviewed it can been seen that a number of them were looking to identify what benefits coaching brought to individuals and to their organization, a number of them also point to issues of trust and the relationship between coach and coachee being important (McGovern, Lindeman, Vergara, Murphy, Baker and Warrenfeltz, 2001; Wang and Wentling, 2001; Kampa-Kokesch, 2002; Smither and London, 2003; Dawdy, 2004; Gonzalez, 2004; Bush, 2005; Gyllensyen and Palmer, 2005b; Luebbe, 2005; Orenstein 2006; Jones and Spooner 2006; Passmore, 2008). So by the middle of the last decade research was growing around both outcome predictions from coaching, and understanding what factors have the greatest impact on the success of coaching. Since that time, these researchers and others (Grant and Cavangh, 2006; Gray, 2010, Critchley, 2010, De Haan et al, 2012; Briner, 2013) have continued to look at these areas as well as trying to understand more about theoretical and practical ways to enhance coaching practice.

Around the same time a doctoral paper was produced by Blackman (2007) which, as well as adding to the body of research also sought to summarize key research conducted in coaching over the last 15 years. This study was particularly interesting in that as well as summarizing the current state of research it also looked to explain where there were consistent findings in that research. In his research Blackman analysed participant perspectives on the factors that make coaching effective and identified variables that should be included in any explanatory framework for the coaching process. The findings in Blackman's study focused on the main components involved in the coaching process: the coach, the coachee, the organization and the coaching process. A number of variables within these core elements were measured using data derived from a questionnaire designed by the researcher. The questionnaire, which was administered to coachees, used both open and closed questions to determine the importance of the variables in the coaching process. The specific aims for the Study were to:

- Assess the relative importance of the components and factors listed in the preliminary model, to perceived coaching effectiveness
- Identify factors to include in a revised model of coaching effectiveness.

Three key themes emerged from this first study: the importance of coach experience and technical expertise, the idea that key processes change in significance in different phases of coaching and the need for greater attention to coachee goals. These three themes were therefore carried forward into the next study.

A second study by Blackman also in 2007 included a workshop and series of individual coaching sessions that were designed to compare one-on-one coaching with workshops. In addition Blackman wanted to explore further the relative importance of general coaching skills (versus industry specific coaching skills as this was a feature noted by respondents in the first study). As well as presenting empirical evidence which suggested that coaching was effective and that coachees felt that coaching was helpful and effective in assisting them in achieving their goals, it confirmed the critical importance of the three main components of coaching: the coach, the coachee and the coaching process. This supports the model that Jarvis (2007) presented in her summary of the executive coaching market. While this finding may appear simple and obvious, it is significant in that it is suggesting that not only are these three factors critical but that it is the important interrelationship between these factors that impacts on coaching outcomes. This research brings attention to the particular dynamics between the coach and coachee at the point that matching decisions are made.

When analysing the results of the first study, where participants nominated features they felt were important for a coach to have, they listed communicating clearly, being organized, maintaining confidentiality and having industry experience. However, after the second study and as the analysis became more in-depth it was revealed that these variables were not the factors that made a significant contribution to the effectiveness of the coaching process. Rather it was the degree of similarity between coach and coachee, coachee commitment to the process and a focus on goals. As will be seen later, (Wycherley and Cox (2008) there is a contrary-perspective to this which suggests that too much similarity can lead to the danger of collusion in the relationship.

The key themes in this study suggested that it is not the delivery mode (group or one-on-one) of coaching that is important, it is the content (e.g. goal setting) of the sessions and the need for there to be a good match between the coach and coachee. While this may seem obvious, what is interesting is that those investigating and researching coaching were often spending more time investigating the mode of delivery and style of coaching, whereas this, and other research presented here, was pointing to the central importance of matching. This indicates a need to conduct more research to understand what impacts positively and negatively on this match.

In Passmore and Fillery-Travis's (2011) paper entitled "A critical review of executive coaching research: A decade of progress and what's to come", they point out that

> The readiness of the client for change has been identified as a major predictor of coaching effectiveness and already certain research effort has been invested in assessing it. This needs to continue and be extended to include factors which may influence "matching" of client and coach as well as preparation of the client for coaching (page 11)

What does seem to come through strongly in the research in relation to most helping relationships including coaching is that a quality coaching relationship is perhaps the single most important factor for successful outcomes (for example, Asay and Lambert, 1999; Kampa-Kokesch and Anderson, 2001; O'Broin and Palmer, 2006). With many arguing that the most consistently identified factor seen as contributing to the success of coaching is the quality of the relationship between the coach and client (De Haan, 2008a; 2008b). Similarly an American Management Association study (Thompson et al., 2008) reported that 65 percent of terminated coaching assignments were due to ineffective client-coach relationships. Each time these different authors were looking at critical elements in coaching success. Without explicitly seeking to confirm the role of relationships, relationships emerged as a strong factor from their research.

### 2.4 The Coaching relationship

So as shown above the coaching relationship has been seen by a substantial number of researchers and practitioners as being critical in coaching effectiveness (Bacon and Spear, 2003; Kilburg, 1996, 2001; Baron and Morin, 2009; Bluckert 2005; De Haan et al 2012). For example Bluckert (2006) commenting on the coaching relationship stated "For many coaches the quality of the coaching relationship is not just ***a*** critical success factor but ***the*** critical success factor in successful coaching outcomes" (p 336). He concludes that the critical factors are:

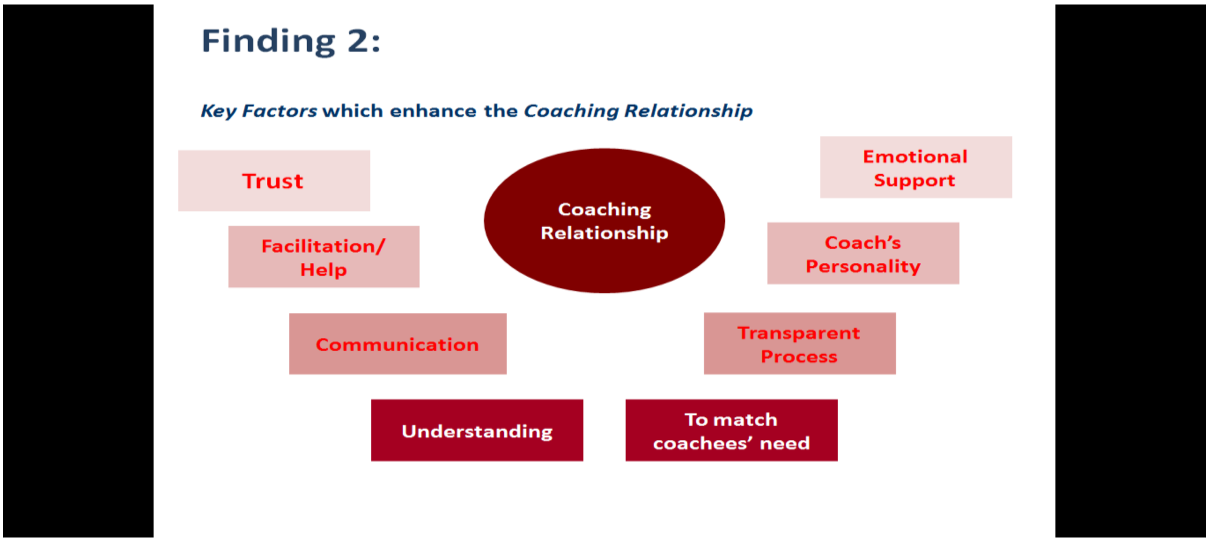
- The influence of client-centred thinking
- Establishing rapport in the coaching relationship
- Support and challenge – achieving the fine balance between support and challenge may be one of the most important factors in building effective coaching relationships and at the same time, one of the most difficult things to achieve
- The issue of trust

De Haan, Culpin and Curd (2009) found that coachees in response to the research question "What determines helpfulness for clients?" presented a picture of valuing the relationship with and the qualities of the coach, while making little distinction between specific interventions of that same coach. These findings tend to support the idea that helpfulness is much less predicted by technique or approach than by factors common to all coaching such as relationship, empathic understanding, and positive expectations. De Haan (2008) had previously reached similar conclusions to those earlier by Bluckert (2006) that the coaching relationship, or working alliance as he calls it, was the most important central concept to the success of coaching, as articulated by the end user – the coachee. So from reviewing the literature on what matters in coaching, there is a strong recognition in published coaching research, dissertations and articles that the client-coach relationship is a critical element (Kampa and White, 2002; Kampa-Kokesch and Anderson, 2001; Kilburg, 2001; Lowman, 2005 de Haan and Sills 2012; Baron and Morin 2009 O'Broin and Palmer, 2010).

For example, Seamons (2006) conducted qualitative interviews to examine the most important component parts in an executive coaching intervention. Eight cases were surveyed by telephone, each one asking the coach, the client (person being coached, or coachee) and the client's boss what their view was as to why the coaching experience was successful. While the responses showed that the support of the client's boss was the single most important factor leading to coaching success in these cases, further cross-case agreement was present on the following factors: client adherence (the client's willingness to engage in coaching), insight through feedback, coach/client relationship, and the provision of a reflective/developmental space (a non-threatening, open atmosphere which encourages growth). Thach (2002) which studied the quantitative impact of a coaching and 360 feedback processes on the leadership effectiveness of over 280 executives reported the relationship between coach and coachee as being an important factor in helping the executive make meaning of the results and translate those results into work differences. Finally Wasylshyn (2003), in exploring a range of factors influencing coaching, including the choice of coach, found that 86% of the participants identified as the key personal characteristic of an effective coach the coach's ability to "form a strong connection" with the executive.

The interaction of the characteristics of the two individuals is particularly critical in determining the characteristics of a relationship (Wanberg, Welsh and Hezlett, 2003). Hodgetts (2002) maintained that personal chemistry between coaches and coachees and such factors as gender, socioeconomic background, and life experiences are also important considerations in making effective coaching matches. He believed that a good match and relationship between the coachee and coach is a critical factor for enhancing self-awareness, learning, and thus behavioural change. This key importance of the need for a good "match" between coach and client has been strongly emphasized. Boyce et al (2010) presented a key paper on the research conducted on coaching matching. In doing so they summarized the position on the significance of the relationship when they said "A successful client-coach relationship is critical to coaching effectiveness and practitioners should consider the fit between the client and coach personal characteristics when pairing a client with a coach" (p.926). Briner (2013) talking at the BPS Occupational Psychology conference cited Yi Ling-Lai's (2012) PhD research in which it was discovered that factors such as emotional support and trust, and the overall quality of the coaching relationship, rather than merely the content of the coaching sessions, was believed to be key. Shown below is the visual representation of Yi-Ling's findings:

*Figure 3: Factors Impacting on Coaching*




The next section looks further into the issue of matching in client-coach relationships while also presenting what has been reported about matching in the mentoring literature. And finally what has been reported in the psychotherapy and counselling literature.

### 2.5 The coaching literature on matching

Research on the coaching relationship and matching by Boyce and Hernez-Broome (2010) has shown that the coaching relationship can be influenced by the independent characteristics of the coach and client. The coaching relationship is arguably predicated on the sets of experiences, backgrounds, styles and general histories that each brings; and is further influenced by the level of organizational support. Shown below is the Conceptual Framework put forward by Boyce and Hernez-Broome (2010: p.200) on the impact of client-coach matching on coaching relationships and coaching outcomes:

*Figure 4: Boyce & Hernez-Broome conceptual framework*

| Client-Coach Match Characteristics | Coaching Relationship Process | Leadership Coaching Outcomes |
|---|---|---|
| Commonality | Building and Maintaining Rapport | Reactions |

| | | |
|---|---|---|
| 1. Demographics<br>2. Professional<br>3. Personal<br>**Compatibility**<br>1. Behavioural preference<br>2. Personality<br>**Credibility**<br>1. Coach capabilities<br>2. Coach experiences | **Establishing and Maintaining Trust**<br>**Encouraging Commitment**<br>**Promoting Collaboration** | 1. Satisfaction<br>2. Utility<br>**Learning**<br>1. Knowledge<br>2. Cognitive<br>3. Affective<br>**Behavioural Skill Performance**<br>**Organizational Results**<br>**Formative Processes** |

Of particular relevance is the process of client-coach match. As outlined in Chapter 1, "matching" is said to relate to the process by which a coach is identified to work with the needs of a particular coachee. Arguably it involves everything that happens prior to coaching starting, and Joo (2005, p.480) argues that selecting executive coaches and matching them to the coachee "*is critical in coaching effectiveness*". Wycherley and Cox (2008) used a simple definition of matching as an "attempt to identify a coach tailored to meet the needs of an individual client" (p. 40). Jackson, Boyce and Neal (2012: p.199) stated that "matching could be a powerful tool in creating the conditions for a strong coaching relationship" and that this relationship, as shown earlier, can be seen to support key coaching processes expected to lead to favourable coaching outcomes.

However, Gray (2010) argues that the coaching literature does not pay sufficient attention to an essential ingredient to coaching – the match between coach and coachee. Gray suggests this may indicate a lack of appreciation of wider research. In other fields, attention has been given to matching in similar dyadic relationships, for example between students and supervisors (Armstrong, Macfarlane and Mathews, 2004) managers and subordinates (Alison, Carr, Beck and Gregory, 2001) and mentors and protégés (Armstrong, Allinson and Hayes, 2002). For example, St-Jean and Audet (2009) pointed out that each relationship is unique and depends therefore to a large extent on the interplay of a number of factors and that "pairings" are more successful when based on personal rather than purely professional affinity. What is interesting is that the researchers appeared to have not anticipated this finding, expecting instead for it to be based more on a logical rational alignment of needs and experience. Gray (2010) used semi-structured interviews with those about to embark on mentoring/coaching relationships and identified as the result of his initial interviews some interesting themes. Firstly, the skills coachees were looking for in choosing their coach and secondly what coachees might do differently in the future in choosing their coach. This included that organizations that sponsor or deliver executive coaching programmes need to provide a diversity of coaches for selection.

Wycherley and Cox (2008), in reviewing the main evidence and arguments on matching over the last 10 years, suggested that matching is more complex than merely an alignment between two personalities. They went on to say that "Overall simple prescriptions to consider chemistry in matching seem rather limited and imprecise" (p.42). They believe that chemistry and match can be looked at in relation to three key areas: surface diversity factors, deep diversity factors and experience. At the surface level are the readily detectable attributes such as race, ethnicity, sex and age, whilst the deep level includes differences in values, beliefs and attitudes. Whilst surface level diversity tends to affect rapport in the initial stages of a relationship, Harrison , Price and Bell (1998) argued that as the people interact to get to know one another, stereotypes are replaced by more accurate knowledge of each other as individuals. Harrison et al (1998, p.97) suggested, "more complex factors may also be relevant to the selection and matching of executives with their coaches". According to a further suggestion by Wycherley and Cox (2008), the coachee might "need to be encouraged to experiment and learn from a coach who is different from themselves. This exploration could be done at the "set-up" phase in preparation for coach selection" (ibid, p.44).

Atkinson (2005, p.1) suggested that "a match is essential in forming a strong psychological bond" However, s/he also pointed out that there is a danger that executives and other stakeholders may make ill-informed matching decisions based on factors such as the initial rapport between executive and coach. Holland and Humphrey (2006) argued that effective matching helps maximize effectiveness of the coaching intervention as it enables the coach and coachee to get into a position to start coaching as soon as possible.

While the importance of matching is generally accepted, various authors disagree on whether the match should be based on similarity or difference. Ranwell-Ward (2004) for example suggested that it is good to "aim for similarity or difference in order to achieve fast rapport and achievement of goals" (p.78). Whereas Clutterbuck (1998) suggested that a similarity in personality and experience means there are less personal development opportunities. Jarvis (2004) suggested that it is important that the individual selects "the most appropriate coach for their needs, and not just the one they like the most" (pp. 58-59).

Chidiac (2006, p.14), building on the work of Conway (1998) and Hodgetts (2002 p.208), proposed three criteria for selecting the “right coach”:

> 1. Interpersonal skills that include self-awareness, listening and empathy, ability to deliver difficult feedback, etc.
>
> 2. Perceived by the client as “competent and trustworthy”
>
> 3. Sufficient understanding of business and organizational politics

Hodgetts (2002) claimed that chemistry between the coach and coachee plays a crucial role in matching, however, she raised the important question – do we really know what chemistry is as there is no research that addresses this question directly?

A key study carried out by Gray and Goregaokar (2007) researched into Small Medium Enterprises’ (SMEs) matching of coaches. The study described the results from a coaching programme in which coachees were asked to reflect on and justify their choice of coach. Initial qualitative results suggested that female coachees favoured the choice of female coaches, partly as a role model of business success. Male coachees tended to justify the selection of a female coach as more approachable for the discussion of sensitive, personal issues. A minority of male respondents also displayed sexist attitudes in their comments on the selection process. Subsequent quantitative analysis of the data, however, revealed no bias towards the choice of either female or male coaches. Although the results show no statistical significance in gender choices, for a minority of coachees gender appears to be a rather surprising factor in the selection process. Gray (2010, p.45) concluded that :

> This example illustrates the need to support executives in their matching decisions, since basing a decision on appearance and initial liking and rapport can be potentially misleading. Placing too much emphasis on what it feels like when seeing or meeting a potential coach may leave the executive potentially vulnerable to making a choice based on stereotyping and surface diversity factors

Another debate is concerned with the relative importance of the professional skills of the coach in comparison to a unique match between the coach and coachee (de Haan and Sills 2010). For example Wycherley and Cox (2008) posed a question about the impact on matching if the coach was more able to adapt to any coachee. Porche and Niederer, (2001) similarly believe that a reason for the increase in the number of coach referral systems is that many coaches believe they can coach anyone about anything. Their book advocates a view that coaching is simpler than it is often portrayed and suggest that a skilled coach can coach in most situations. However, there is a strongly held counter argument to this, namely that it is about the specific interaction and connection between two people and that the match is not something that can be purely moulded or adapted, it is something that is co-created between two individuals. A coach who is a good match for one person may be a terrible match for another person. de Haan (2008) proposed that the “only thing the coach can exert albeit an indirect influence on the outcome of the coaching is the relationship between the coach and coachee” (p.53) indicating though that the coach who puts greater emphasis on the uniqueness of the coaching relationship might provide better support to the development of the coachee. This implies that not all coaches can coach all coachees, as not all individuals will connect in every relationship.

The debates above suggest the need for further research on the effect of matching, as Bennett (2006) and Feldman and Lankau (2005) also advocate. Although the previously cited authors have all looked at various aspects of matching in coaching it was not until recently that a comprehensive and detailed investigation on the subject of matching was carried out by Boyce et al (2010). They agreed that while researchers have not given clear guidance on how to match, practitioners suggested possible factors to consider when “aligning” coaches with clients, including: commonality, compatibility and credibility.

***Commonality*** – by this they mean: “The client and coach sharing common characteristics or experiences, which can be positioned into three categories: demographics, professional and personal.” (p.916). They suggested that if commonality is high, the belief is that rapport and trust will develop more quickly. They acknowledged that they were referring to the social psychology similarity-attraction hypothesis that maintains that similarity is a major source of attraction between individuals and that a variety of physical, social and status traits can be used as the basis for inferring similarity in attitudes or beliefs (Byrne, 1971; Harrison et al, 1998). It could be questioned though how appropriate it is to generalize from attraction theory to a coaching relationship which may not simply follow the attraction principle. They claimed that findings from mentoring research suggest that homogeneity is preferable and perhaps a prerequisite for mutual understanding and acceptance (Armstrong et al. 2002; Raggins and Cotton, 1999). They also cite Wycherley and Cox (2008, p.43) saying that coaches from a different background than their clients “cannot understand the social and psychological conflicts of the client and therefore deep levels of trust, sharing and cooperation will not be achieved. However, an alternative perspective is that each person could have a different view and unique need in relation to commonality and its utility to coaching. There may be some who will want and need it and some who will want and need the opposite. According to this research what people will cite as important pre-coaching may not necessarily be what they will actually need from coaching. One of the gaps that emerged from this study is the need to understand how much potential coachees really understand about coaching and therefore how much they know what to expect from it. It could be that their request for what they are looking for in coaching says more about what they understand about coaching than it does about their underlying needs. This point is further explained in both Chapter 4 and Chapter 5.

***Compatibility*** – Boyce, Jackson and Neal (2010, p . 201) refer to this as the appropriate combination of client and coach behavioural preferences or characteristics the client and coach possess that influence their cognitions and behaviours in various situations. These can include personality traits as well as managerial, leadership and learning styles. They suggest that coaches matched to clients based on compatible personality and behavioural styles are expected to have a better working relationship, in particular with securing commitment and supporting collaboration. They do acknowledge that the "factor is more complex as matching on similarity may achieve rapid rapport and goal attainment but perhaps at the expense of personal development opportunities and long-term learning". They cite Scoular and Linley (2006, p.11) that in dyads differing on temperament "the coach may instinctively come from a different perspective and perhaps challenge client assumptions more". This may result in a more complex interaction, which may also lead to a higher performance outcome.

A different view was put forward by de Haan et al's (2008) research on MBTI and coaching where they found no correlation of outcome measure whether they were matched based on similarity or difference of personality profile. Duckworth and de Haan's (2009) key conclusions were that:

- Coaching success is not dependent on the client-coach combination of personality types
- Different personality types value different aspects of coaching.

When de Haan and colleagues updated this research (2011) they concluded that there were strong indications for the importance of certain common factors in coaching, in particular the coaching relationship as seen by the client, whilst the importance of objective matching between two personalities might be overstated. Put more simply they believed that you shouldn't just match based on a personality fit. Matching based on similarity or difference is potentially not a productive route to follow, rather it might be more helpful to look more individually at the needs of the coachee and the specific interaction of the coach and coachee on a case by case basis.

***Credibility*** – Boyce, Jackson and Neal (2010: p. 917)) referred to this as a "Coach possessing the necessary credentials to meet client needs and include coaching competence and experience"(p.

917). They believe that matching a credible coach to a client in terms of their coaching needs establishes trust, confidence and openness in the relationship. They go on to say that the tendency to match a coach's expertise with client problems has been consistent and vigorous (for example Kampa-Kokesch and Anderson, 2001; Fillery-Travis and Lane, 2006; Gregory, Levy and Micah 2008). They also point out that the relationship between the coachee and coach is one of the most essential processes of coaching, with numerous authors suggesting that an effective client-coach relationship results in successful coaching outcomes (Baron and Morin, 2009; Gyllensten and Palmer 2007; Hall et al 1999, Thatch 2002; Wasylshyn 2003). A common thread running through the above research is that they define the key processes to support the client-coach relationship as Rapport, Trust and Commitment. They conclude; “despite the suggested importance of the client-coach relationship and the potential impact of building the client-coach relationship, no systematic examination has been performed to examine these issues” (p.927).

In summary Boyce et al’s (2010) research is probably the most recent and wide ranging perspective on the factors that could enhance matching and hence it is given more space in the literature review than other research. While this study significantly added to the body of knowledge around matching in coaching, it did not allow the voice of the coachee to naturally emerge and also did not investigate how their views changed over time. More generally a number of the research studies cited above on matching are based on the opinions of the coaches who participated in the research, the consistency of such message suggests the need to address this issue directly. This is why my research will seek to hear directly from coachees what criteria are important for them. I will also investigate whether the criteria stay the same as the relationship evolves. At the same time I believe it will be important to consider their conceptual framework together with the finding of my research.

**2.6 Related research in the mentoring arena**

Given the strong connections and similarities between coaching and mentoring it is important to also look at what research has been conducted into matching in mentoring. Mentoring has arguably a longer and more established history and, so it could be assumed, that it would have a stronger research base. There are many similarities between coaching and mentoring because both involve a one-to-one relationship that provides an opportunity for individuals to reflect, learn, and develop. However, when comparing coaching with the mentoring, it is important to acknowledge some key differences (Jarvis, 2004). According to Grant (2005, p.24) the main differences between coaching and mentoring are that:

a) Mentoring is a hierarchical relationship

b) Mentoring is about passing on personalized, domain-specific knowledge

c) Coaching is about facilitating self-directed learning and development

d) Traditionally mentoring implies a wise senior and a grateful junior

Hill (2004) points out that mentors can also provide information regarding the cultural and political attributes of people and situations and that mentors' skills can be used to capitalize on future opportunities or overcome past problems. He believes that this is fundamentally different from coaching in so far as the mentor is usually someone more senior who has experience in the field and has a degree of success in the context of work. Clearly this is not the only view on differences between coaching and mentoring; the point to note is that while there are some core similarities between coaching and mentoring there are also differences.

*The table (x) below captures the CIPD perspective (Jarvis 2004) on what differentiates between coaching and mentoring.*

| Mentoring | Coaching |
|---|---|
| Ongoing relationship that can last for a long period of time | Relationship generally has a set duration |
| Can be more informal and meetings can take place as and when the mentee needs some advice, guidance or support | Generally more structured in nature and meetings are scheduled on a regular basis |
| More long-term and takes a broader view of the person | Short-term (sometimes time-bounded) and focused on specific development areas/issues |
| Mentor is usually more experienced and qualified than the "mentee". Often a senior person in the organization who can pass on knowledge, experience and open doors to otherwise out-of-reach opportunities | Coaching is generally not performed on the basis that the coach needs to have direct experience of their client's formal occupational role, unless the coaching is specific and skills-focused |
| Focus is on career and personal development | Focus is generally on development/issues at work |
| Agenda is set by the mentee, with the mentor providing support and guidance to prepare them for future roles | The agenda is focused on achieving specific, immediate goals |
| Mentoring resolves more around developing the mentee professionally | Coaching revolves more around specific development areas/issues |

Therefore, caution needs to be applied in over generalizing from mentoring research to coaching application. In relation to this it is worth noting that Gray (2010) in his research into matching in mentoring commented that he had identified some differences in the matching process between coaching and mentoring, and that further studies are needed to explore this.

Although there may be a number of subtle and important differences, there are also enough similarities to consider the research into this topic as relevant. Therefore the following summary of mentoring research concerns the issue of the relationship and the importance of matching in mentoring, pointing out the challenges to applying the research in a coaching context.

A significant study of mentoring outcomes was carried out by Ragins, Cotton and Miller (2000) who studied a group of 1,162 professionals from many organizations and looked at the effect of formal/informal mentoring relationships on a range of work and career attitudes. Their results show that the crucial factor in perceived effectiveness of the mentoring is the client's satisfaction with the mentoring relationship. A more recent meta-analysis on mentoring aims to shed light on what matters in these relationships. The work led by Lillian Turner de Tormes Eby (2012) used database searches to gather 173 samples where mentoring had been investigated. All these samples contained data on protégé perceptions of mentoring, allowing the study to amass common findings and arrive at sizes for the different effects. The analysis spanned academic and working contexts, and the authors found that the findings rarely differed between these contexts, doing so only in degree, not in nature. First off, greater similarity between protégé and mentor on deep features such as aligned values or attitudes was solidly related to three key measures of mentor value: relationship quality (liking of the mentor and satisfaction with how the relationship has unfolded), psychosocial support (counselling and offering acceptance), and to a lesser extent instrumental support (sponsorship or providing visibility in organizations). Having a similar background and experiences between mentor and mentee provided a more modest boost to instrumental support and a smaller one with relationship quality. Meanwhile, surface level similarities between mentor and protégé such as race, age and gender turned out to be in aggregate almost irrelevant.

Hale (2000), discussing matching in mentoring, introduced a different perspective in what he calls a "middle ground" where a third party facilitates the pairing of mentor and mentee by providing support and guidance but allowing the actual decision to be taken by the mentor and mentee. He goes on to criticize how formal mentoring is currently matched citing a quote from Chao, Walz and Gardner (1992, p.64) "A current practice of random assignment of protégés to mentors is analogous to blind dates, there would be a small probability that the match would be successful, but more attention to the selection phase would raise this probability above chance levels".

He claims that very little has been put forward, with confidence, as a method for pairing that was grounded in research and found to be consistently reliable. Forret (1996) suggested asking past and potential participants for their views. However others such as Conway (1998) are dismissive of attempts to systematize the matching process, suggesting that it is more appropriate to treat each case individually. What is appropriate will depend on the needs of the individual concerned. Hay (1995) identified three factors for consideration:

1. Whether to mix or match, factors such as gender, culture age etc.
2. The need for support or challenge
3. Whether or not the mentor should be a role model.

Cox (2005) highlights a key difference between the mentoring and coaching relationship around the issue of role modelling. Role model and acting as a role model is frequently or usually cited as a key component of mentoring and hence often discussed in terms of matching and choosing mentors. However, it could be argued that in coaching this is less critical and less often cited as being a key component of coaching and therefore conclusions drawn about matching or choosing based on role-modelling is unlikely to be applicable to the coaching arena.

Cox (2005) quotes mentoring scheme coordinators who espouse a view that any good mentor should be able to mentor any mentee, although this may reflect another difference between mentoring and coaching with mentoring being more expert based and coaching being more about empowering the coachee. Cox cites one mentoring scheme where it was concluded that, when asking the mentee to choose their mentor the mentee nearly always went for the familiar and similar mentor. However, a potential problem with this approach is a limiting spectrum of choices. Mentees were given leading information on the mentors to select against rather than being asked open questions about what they wanted in their mentor. In conclusion Cox makes two additional points. Firstly, recognizing the challenges to matching, mentors should be trained more to identify and build on initial matching decisions. Secondly, recognizing the unreliability of knowledge by mentee about what they want in a mentor, one should not base the match purely on the information they present. However, it could be argued that investing time in helping and guiding the mentee could prove to be an equally valuable strategy.

Carruthers (1993) introduces a further dimension to the issue of the relationship and matching talking about the trajectory or phases of the mentoring relationship and how this evolves over the course of their time together. This draws attention to the fact that matching and decisions around matching and choosing who to work with are made at a very early point in the relationship and therefore may overly focus on that phase of the relationship rather than what might be important later in the relationship. Unfortunately no research has taken this point further or looked at this in relation to coaching, and this is one of the gaps that my research will seek to shed light on.

In Nielson and Eisenbach's (2003) article "Not all relationships are created equal: critical factors of high quality mentoring relationships", they cite research by Canary and Spitzberg, (1989) and Millar and Rogers, (1976) on interpersonal relationships which identifies four dimensions of relationship quality that influence relationship outcomes in mentoring: trust, control, intimacy and satisfaction. Arguably these factors would also be similar in a coaching.

Although no systematic research had previously been conducted to determine which method of pairing is best, Forret (1996: p.28) suggest that "it is probably safe to assume discussions with past and potential participants in a mentoring programme should provide useful input in determining how to pair mentors. It is proposed that when seeking to match coach and coachee it is helpful to consider both similarities and differences across a range of criteria. Clearly an overriding consideration will be "what are the objectives in setting up the coaching relationship and what is the need of the coachee?" Also it will be necessary to consider whether the mentee is ready and willing to work with a more challenging and confronting mentor who may be quite different in style, or whether a more comfortable but less challenging relationship is appropriate.

The conclusion to draw from the relevant research in mentoring and coaching is that matching is a complex process that needs to be looked at from a range of angles including the mentor (coach), mentee (coachee) and those stakeholders or interested parties who also have a role to play in setting up the relationship. This complexity perhaps led to authors like Wycherley and Cox (2008) to suggest that the issue of matching should be looked at more objectively: "Our tentative conclusions are that there are benefits from focusing on the objective selection of coaches using robust standards and criteria, rather than relying on surface or deep diversity factors or subjective matching approaches based on initial rapport" (p 49). As we shall see this focus primarily on objectivity in matching may well be too simplistic and lead to key factors in the matching being over looked.

## 2.7 The psychotherapy and counselling literature

To investigate the importance of the working relationship and what is important in matching in coaching, it is important to build on the huge amount of research from the similar disciplines of psychotherapy and counselling. Spinelli (2008) pointed out in his paper on "Coaching and Therapy: Similarities and Differences":

> It needs to be acknowledged that all current attempts at coaching theories are substantially indebted to a wide range of therapeutic models and discourse such that it is not too unlikely that whatever theories of coaching eventually evolve they will at least be founded upon existing models of therapy (p.242).

In investigating the significant body of research in psychotherapy and counselling I was looking to investigate what this profession had learnt about matching and choice as well as the general importance of the relationship to the success of the intervention.

Given their longer history, psychotherapy and counselling are perhaps more researched disciplines, with some significant longitudinal and in-depth effectiveness studies having been conducted over the last 50 years. While coaching and therapy are two different activities, they have enough in common – in the sense that they both involve the intentional use of a relationship to further the development of a client – to make these conclusions (Peltier, 2001, Palmer et al, 2005). So turning to the arena of psychotherapy and counselling it is interesting to start with a quote from Hodson (2006), the leading official spokesperson for the British Association of Counselling and Psychotherapy stating that*:* "The most important factor in determining whether your therapy is successful is your relationship with the therapist. If a counsellor is brilliant at the theory but doesn't have much empathy with people, their results won't be so impressive." This is a theme that consistently emerges when reviewing research into psychotherapy and counselling with the majority of studies pointing to the important of the "connection" and relationship between therapist and client. Within the world of counselling and psychotherapy training and practice the concept of "therapeutic alliance" (also called the "working alliance", "therapeutic bond", "helping alliance" or simply the "alliance") is seen as key with over 4,000 papers and dissertations written on it in the last 30 years (Cooper 2008) and more than 24 different scales developed to measure it (Hovarth and Bedi, 2002; Muehlenbrock, Soller and Jermann, 2000). For example there are a number of research projects such as Havik , Monsen and Hoglend (1995) who conducted a multi-site study on process and outcome of psychotherapy and found that Working Alliance (a measure of the relationship) has been a consistent, though modest, predictor of outcome in psychotherapy. In two meta-analyses the effect sizes (*r*) have been found to be 0.26 and 0.22, respectively. Early alliance has been found to be a better predictor of outcome than alliance averaged across sessions or measured in the middle or late phase of treatment. It should be noted that patients' ratings of working alliance tend to be more highly correlated with outcome of therapy than the therapists' ratings.

In a follow up study Hersoug, Hoglend, Monsen and Havik (2001) however concluded that over the last 20 years studies have yielded somewhat variable results with regard to the relationships between therapists' professional experience, formal training, competence as a psychotherapist, and working alliance. The most consistent finding from any meta-analysis is that the relationship is more important than the training and background (experience) of the therapist/coach.

A number of authors (Knipscheer 2004; Alladin 1994; Stoppard 1985) have investigated the impact of ethnicity on matching in counselling and psychotherapy. However, while the research did seem to show some link to outcome effectiveness ratings the research doesn't really explore the open dialogue with the client about choice and so it is hard to draw concrete conclusions of the criticality of ethnicity in matching. Dolinsky, Vaughan and Luber, (1998) exploring matching and relationship phenomena arrived at the following conclusions:

- The relationship being a two-person system naturally created interest in the complex and multifaceted relationship between patient and therapist
- Match is considered to be a reality that creates a context that significantly influences the subsequent development of all other dimensions of the therapeutic process
- Often an idea of a fantasized match serves as the basis for the referral of a patient to a particular therapist
- Match is an autonomous reality that stands apart from the therapeutic process, however it influences the development of other patient-therapist interactions considered critical to the therapeutic process (therapeutic alliance, transference, counter-transference)
- If match is seminal in the development of key elements of the therapeutic process, this naturally leads to the hypothesis that "good" patient-therapist match correlates with therapeutic benefit" (p.121).

A significant new angle proposed by Dolinsky is that the match may well be something different from the process of therapy (or coaching). However it has a significant angle on the development of critical elements of the process and will correlate with a perception of benefit from therapy (or coaching). This depth of reflection on the match appears to have not been considered to the same extent in some of the coaching research. Dolinksy (1998) also commented on the lack of research saying that while clinicians have been discussing patient-therapist match in conceptual and theoretical terms psychotherapy researchers have focused on gathering descriptive information.

It should be noted that these studies have focused exclusively on match as it relates to the initial process of choosing a therapist rather than examining the evolution of match longitudinally. This idea of a longitudinal view on the matching does appear to be one that has not been explored generally and specifically. There appears to be a lack of research in this area in the coaching field, despite the issue being raised in mentoring and psychotherapy. This is one of the gaps in knowledge that this research seeks to address.

Dolinsky et al (1998) also cite research that has shown a relationship between match and outcome but say that some of this research is flawed because of the lack of a priori definition of what match is. This is a critical point, and one that again has not been given sufficient attention. It is not clear how does one define a good match, and at what point is that definition of a good match being made -at the start of the work, during the work, or at the end. Arguably it should include all points of reference. This is a point that will be picked up in the Discussion chapter.

Dolinsky et al's (1998) own research reports on a study of patient-therapist match in 50 psychodynamic psychotherapy dyads. 66% of patients and therapists agreed about the quality of the match, with 58% of patients and 56% of therapists reporting that the match was positive. Positive match correlated with positive patient and therapist assessments about the progress of therapy but not with the perceived similarity of personal characteristics.

Probably the most significant and widely discussed writing in the field of psychotherapy and counselling was Wampold's (2001) book "The great psychotherapy debate" which critically concluded that all of the specific active ingredients identified are common to all professional approaches. These are the so-called common factors. Common factors are said to include factors to do with:

- Setting the meeting at consistent intervals
- Providing an expectation that things may get better
- The clients' desire to be helped
- The clients' expectations, preferences and support networks
- The therapist (coach) warmth, quality of listening

- The relationship (quality of communication, trust, agreement about the shared endeavour).

So in a related discipline, which has been researched more widely, and for a longer period of time a similar conclusion is reached that the relationship is key and that matching is a significant component of the dyadic relationship. There are differences between the different disciplines and in particular in matching in psychotherapy where the matching is often decided by a third party reference (such as a GP) and there is less choice as compared to that often made available to coachees in coaching. However, the theme is still strong, the relationship makes a big difference, and matching has a big impact on getting the "right" relationship. Assay and Lambert (1999), leading figures in the counselling and psychotherapy research field, estimate that relational factors account for around and 30% of the variance in outcomes. Anderson and Carter (1982) writing about the psychotherapy-patient therapist match argued that the goal inherent in matching is to "make therapy more productive and expedient by reducing resistances and negative counter-transferences with the ultimate aim of enhancing therapeutic outcome" (p. 461).

Given that in coaching more emphasis is placed on the collaboration between the coach and coachee and empowerment of the coachee matching should be considered as a choice made by the coachee. Roberts and Jarret (2006, p.30) describing what matters most in coaching said that "Clients may make a choice based on what they believe to be rational criteria, whereas in fact they may be influenced by...unconscious factors that can play a part." For example a mutual sense of "good fit" may indicate a potential for effective collaboration, but it may also indicate that coach and client are at risk of colluding in avoiding some of the most difficult issues. One of the key issues, therefore, in matching is the concept of choice and psychological factors influencing coachees. For this reason more than in counselling and therapy it is important to consider matching as a function of their choice and decision-making. This idea will be explored in more detail in reviewing my findings in Chapter 5.

**2.8 Summary**

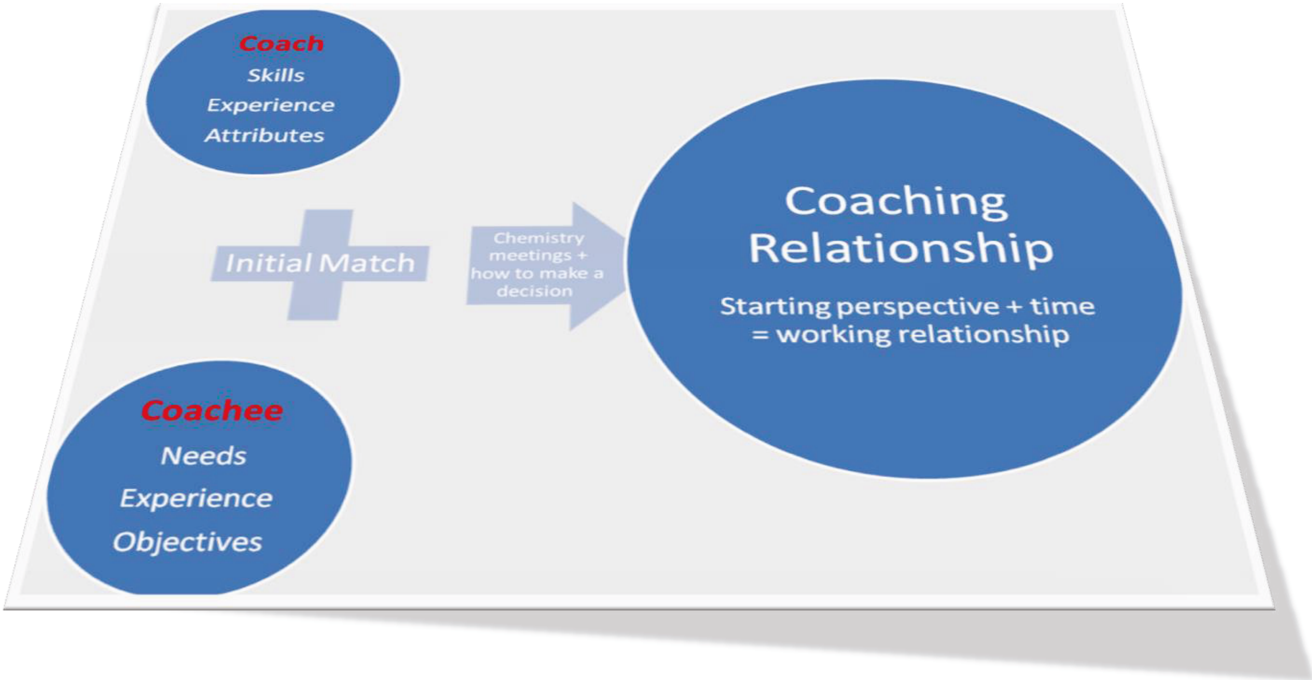
The review of the literature started by focusing on what makes coaching effective, before considering the importance of the relationship as one of those factors and the complex issue of matching. While there have been a number of authors pointing to the central importance of matching, significant conceptual disagreements are evident in their positions leading to significantly different implication for practice. Thus emerges a recognition of the personalized nature of the choice made by the coachee and consequently the need to pay more attention to helping the coachee make the choice that fit their needs and circumstances. Some commentators emphasize a need of matching process that could “empower the person receiving the coaching to be more involved in the process of choosing the coach” (Blake-Beard, O’Neil and McGowan, 2007).

Many authors, e.g. Wycherley and Cox (2008) and Boyce, Jackson and Neal (2010) point out the lack of systematic evaluation of the matching phenomenon. Their research arguably comes closest to providing a conceptual framework of what is critical in the match, including the relationship variables, and provides a potentially common foundation for future research. While many authors are, in different ways, pointing to the issue about helping the individual coachee make an informed decision on who to work with as their coach, very little has been written or researched from the coachee’s perspective. It is this gap that my research is primarily focused on, trying to find out more from a coachee perspective on what matters to them, from their own unique perspective, in terms of the type of coach they want to work with and also what they are looking to get from coaching.

The intention of my research is to address this gap in the literature by applying a philosophical epistemological stance of interpretative phenomenology. The research question is concerned therefore with how to give more voice to the coachee about the matching process, to understand this process from their perspective rather than focusing on trying to establish an “objective”, expert model. I am also seeking to address another gap in the research on matching, including the perspective of coachees on how the relationship between them and coach, and changes over time and what potential implication this might have for matching (Carruthers, 1999). It is possible that this methodological approach may help to shed light on the role of the “chemistry meeting”, another under-researched topic, and how it is enabling this decision-making process again from the perspective of the coachee.

To summarize what the landscape of the literature is saying and where the gaps are that this research is addressing I present the following conceptual framework. This attempts to show in its simplest form what literature suggests about the process when coaching is initiated: there is a need to match a coachee with a coach(es) and that this match is based on some kind of decision about the combination of the needs, experience and knowledge and objectives of the coachee, but also with consideration of the skills, experience and attributes of the coach. At some point the coach and coachee meet to make a decision about working together, which leads to an initial decision to start work and begin a relationship. The literature also shows that the relationship changes over time. This research is seeking to understand more about what informs that initial match from the coachee’s perspective, how the coachee works through the decision-making process and also how the coachee's perspective changes as the relationship evolves from starting the work to being in a coaching relationship. It appears that in the coaching literature these perspectives have not been previously investigated, and specifically not from the phenomenological stance. Literature on mentoring and counselling and therapy, although raising some of the above questions conceptually, also is limited in terms of the focused research on these topics.

*Figure 5: Conceptual Framework of relationship between coach, coachee and the "Match".*



## CHAPTER 3 - METHODOLOGY

*"Any intelligent fool can make things bigger, more complex, and more violent, it takes a touch of genius – and a lot of courage – to move in the opposite direction"* Albert Einstein.

### 3.1 Introduction

This chapter will explain the philosophical assumptions that shaped this study and describe the journey that led to the particular methodology being adopted, as well as my rationale for rejecting other approaches. It will then describe how the study was conducted, including information about sampling approach, recruitment of participants and data collection methods. I will discuss some of the issues that arose in taking this approach and comment on ethics and the importance of reflexivity in the context of this study.

Following this will be a detailed explanation of how data was collected and the particular analysis process I used, including a discussion on the criteria of quality and methodological efficiency and limitations.

### 3.2 Philosophical position

I have been fascinated with the concept of matching since it became a major part of my role in running a large UK coaching practice seven years ago. After a few years it became apparent, as outlined in chapter two, that there was a lack of research into the concept and practice of matching in coaching. As I spent significant time communicating with coachees at this critical point in their coaching journey I further realized that very little attention had been paid to eliciting the issues from the coachee perspective. It is this gap that I had a particular interest in learning more about. Therefore my underlying intention for this study is providing a voice for coaches by exploring their lived experiences of matching in coaching.

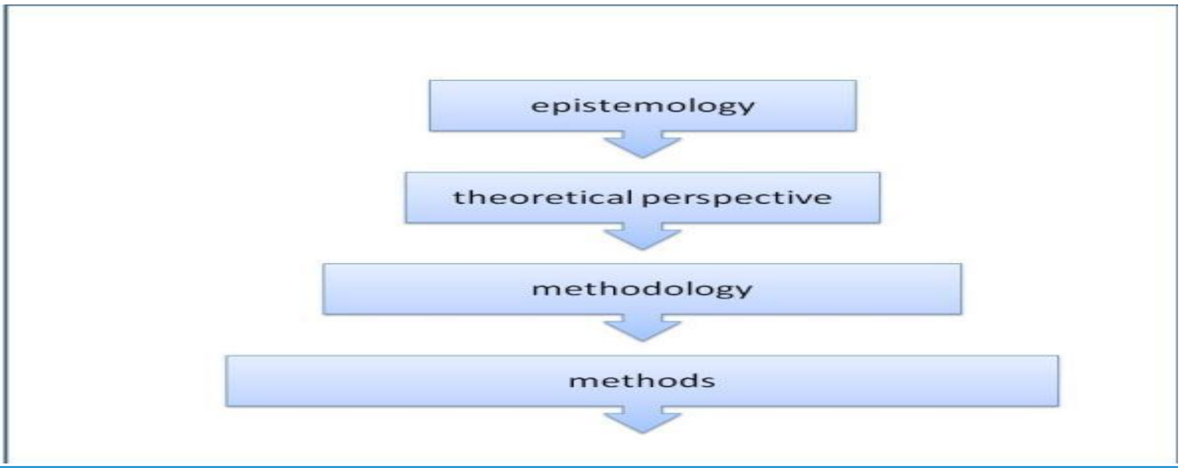
It is said though that every researcher comes to research with a paradigm of beliefs that determine their choice of question and their subsequent inquiries (Willig 2008). A paradigm is a set of common beliefs and agreements shared between scientists about how problems should be understood and addressed (Kuhn, 1962), or more simply a set of beliefs and assumptions that guide actions. Reflecting on my set of beliefs and assumptions it is clear that I was leaning towards an interpretivisit paradigm rather than positivist paradigm. In trying to answer ontological questions: "how things really are" and "how things really work" (Denzin and Lincoln, 1998:201) I realised that I am more interested in the way people perceive the world rather than the objective nature of the world. I believe that people can experience the same "objective" condition in radically different ways creating their "worldview" according to existential philosophy (Spinelli, 2008). This subjectivist and relativist ontological position inevitably implies anti-positivist epistemology that is interested in understanding how individuals experience the world through their unique constructs.

As I read more about the subject I developed a philosophical interest in phenomenology. According to Giorgi (2000), the operative word in phenomenological research is "describe". The aim of the researcher is to describe as accurately as possible the phenomenon, refraining from any pre-given framework but remaining true to the data facts. According to Welman and Kruger (1999, p. 189) "phenomenologists are concerned with understanding social and psychological phenomena from the perspective of the people involved". A researcher applying phenomenology is concerned with the lived experiences of the people (Greene, 1997; Holloway, 1997; Kruger, 1998; Kvale, 1996; Maypole and Davies, 2001; Robinson and Reed, 1998). This description seemed to speak to my professional and personal interest in wanting to understand how the people who are most central to matching experienced this process.

Considering the role of the researcher in the inquiry I have spent time reflecting on how my values, experiences, supervision, interest, beliefs, background, my role and my philosophy towards coaching would impact on my research. These elements naturally seemed to keep on occurring in both my conversations with my supervisors and in my own self-reflection. This has been a significant discovery for me. I naively had assumed that it would be relatively easy to remain objective and detached and that there were greater concerns to worry about regarding the technical aspects of the research. I can now see that as Willig (2008, p.10) states "Reflexivity is important, because it encourages us to foreground, and reflect upon, the ways in which the person of the researcher is implicated in the research and its findings".

With this awareness in mind, I strived to maintain an open mind and therefore, read and reflected on a range of alternative methodological approaches. While I have challenged my thinking I always have come back to the view that the existential stance is the one that I am most aligned to which is largely associated with a constructivist perspective where truth or meaning is constructed not discovered (Crotty, 1998). Therefore, looking at this in relation to Crotty's (1998) four element framework of approach to research (Figure 1) it could be summarised that my epistemological position is constructivist with the focus on the psychological factors influencing the process by which coachees chose their coaches, including what they ask for in their coach, how they decide which coach to work with and how they articulate that.

*Figure 6: Crotty Conceptual Framework*




This translates into a theoretical perspective, which has a phenomenological base, the main weight being on the way people experience the world rather than on discursive deconstructions. As Osbourne (1990, p.80) says "If as claimed by existential phenomenology, all knowledge is human knowledge and apprehended through our phenomenal experience is a good starting place for development of an understanding of what it is to be human". The focus of such an approach is the understanding of a person's experience of their world(s) and not the generation of laws (Giorgi, 1970) and that is what I realised I was seeking to explore. Therefore, the main intention of the research was exploratory in relation to the lived experiences of leaders choosing their coach.

**3.3 The Journey to methodology**

In this section I will describe the choices I made in terms of methodology and what influenced my decisions. As Robson (2002, p.80) says "The general principle is that the research strategy or strategies, and the methods or techniques employed, must be appropriate for the questions you want to answer. In this respect the methodology should be inevitable." As has been shown the question I was asking required an inductive approach and qualitative data. Willig (2008, p.38) assets "We cannot ask questions without making assumptions" and these assumptions are laid bare through the interplay between question, methodology and underpinning epistemology. My initial perspective as expressed was that from looking at the methodological approaches available my approach would translate into a phenomenological outlook on research. Considering the inevitability of interpretation in the process of analysis I decided that methodological approach that I would engage with will be Interpretative Phenomenological Analysis (IPA) rather than a purely phenomenological one. Therefore, in the next sections I will outline why I rejected other qualitative methodologies, which do not contradict the above philosophical position and how the decision to move from Phenomenological Analysis (PA) to Interpretative Phenomenological Analysis (IPA) was made.

### *3.3.1 Phenomenological Analysis (PA)*

Holloway (1997) states that researchers who use phenomenology are reluctant to prescribe techniques. Hyncer (1999, p.143) concurs stating that "(there) is an appropriate reluctance on the part of phenomenologists to focus too much on specific steps". He goes on to say that one cannot impose method on a phenomenon "since that would do great injustice to the integrity of that phenomenon" (p.144). Arguably there is no such thing as the phenomenological method; rather phenomenological methodology is more of an orientation than a specific method. However, some guidelines are necessary especially for the novice researcher. According to Hycner (1999, p.156) "the phenomenon dictates the method (not vice versa) including even the type of participants". Bentz and Shapiro (1998) and Kensit (2000) caution that the researcher must allow the data to emerge: "Doing Phenomenology means capturing rich descriptions of phenomena and their settings "(p.104). Kabat-Zinn states "inquiry doesn't mean looking for answers" (1988). I think this concisely sums up my approach, in that I was not looking for answers to solving the matching problem, I was more interested in increasing the knowledge on the issue by adding the voice of the coachee to all the previous perspectives offered. For me inquiry is about being curious and interested in an issue or subject area.

Data are obtained about how the participants "think and feel in the most direct ways" (Bentz and Shapiro, 1998. p.96). The intent is to focus on what goes on within the participants and in getting the participants to describe their lived experience in a language as free from the constructs of the intellect and society as possible. This is one form of bracketing. There is also a second form of bracketing for the researcher which, according to Miller and Crabtree (1992, p.24), is that the researcher "must bracket his/her own preconceptions and enter into the individual's life world and use the self as an experiencing interpreter". Kvale (1996) remarks with regard to data capturing during the qualitative interview that it "is literally an "inter view", an interchange of views between two persons conversing about a theme of mutual interest, where the researcher attempts to understand the world from the subjects' point to view, to unfold the meaning of people's experiences (pp. 1-2).

A central tenet of the phenomenological approach is the rule of *epoché*, which urges us to set aside our initial biases and prejudices of things, to suspend our expectations and assumptions and to *bracket* so that we can focus on the primary and immediate data. One of the challenges to this in any research is the vehicle of language and whether people are able to use language to capture the essence of their experience. As will be shown in the chapters analysing and discussing the data, the subtlety of language and the potential lack of shared use of the same terminology, was particularly relevant in this research. With an increasing awareness of the constructionist implications of language – even the research proposition terms such as "matching", "choice", "decision-making" for example are loaded with meaning and will have different meanings to different people. Added to this challenge is the whole cultural dimension to the topic – there is inevitably a cultural view of coaching, a cultural view of choice and matching. Further, there is also the issue of a cultural response to research and the researcher.

However, although the purity and aims of a phenomenological approach was appealing it became clear that it would be too difficult and challenging to take a pure phenomenological approach as well as the fact that I was interested in attempting move from pure description to offer some explanation or interpretation of my findings. This led me to consider an Interpretative Phenomenological Analysis (IPA).

### *3.3.2 Interpretative Phenomenological Analysis (IPA)*

Interpretative Phenomenological Analysis (IPA) is a qualitative methodology developed for psychology and the aim of IPA is to explore and understand meanings of experience of the participants (Smith and Osborn, 2004). Research questions in IPA projects are usually framed broadly and openly. There is no attempt to test a predetermined hypothesis of the researcher; rather, the aim is to explore, flexibly and in detail, an area of concern (Smith and Osborn 2007). IPA can be appropriate for a number of topics if the aim of the study is to explore individuals' experiences and the meaning of these experiences. Phenomenology relates to the person's individual views of an event rather than an objective statement about the event (Smith, 1996). Consequently, IPA attempts to explore the participants' perceptions and insider views of an event. Via interpretation of the data the researcher takes an active role in attempting to get an insider's perspective of the participant's experience. However, it is recognized that it is impossible for the researcher to get a complete insider's perspective (Smith and Osborn, 2003). In contrast to some other qualitative approaches IPA assumes that there is a link between what participants say and what they think and feel. Nevertheless, it is recognized that this relationship is complicated and participants could find it difficult to verbalize their experiences or they may not want to do so (Smith and Osborn, 2003). This version of phenomenology does not really separate description and interpretation, pulling instead on insights from the hermeneutic tradition and arguing that all description constitutes some form of interpretation. Van Manen (1990 p.180) states:

> The (phenomenological) “facts” of lived experience are always already meaningfully (hermeneutically) experienced. Moreover, even the “facts” of lived experience need to be captured in language and this is inevitably an interpretative process.

Therefore, one does not simply attempt to bracket assumptions and presuppositions. Instead, the interpretative phenomenological researcher works with, and uses them, in an attempt to advance understanding. This seems to be a more realistic description of what I thought would happen with my research, given that I have been working in the area of matching in coaching for over 5 years, Bracketing in its purest sense was always going to be extremely challenging for me. Therefore, IPA is the approach, rather than pure PA, that I attempted to deploy. There are several versions of this approach, and later I will describe the particular approach I adopted. First though I will outline the other approaches that were considered but ultimately rejected.

### *3.3.3 Why I rejected some other approaches*

At the start of this research journey it initially appeared that a case study would be equally applicable as PA/IPA. Clearly there are a number of key benefits of case study, not least the fact that it can be used for a very broad range of applications, that it pays attention to context and uses triangulation. The fact that it concerns with theory building was also appealing. However, the main use of case study is its focus on “particularization not generalization” (Willig, 2008, p.89). Its emphasis on uniqueness and the case itself is one of the reasons I chose not to use it, because I wanted to talk to a number of coachees to establish a voice that was not attached to one specific context. Just as importantly I wanted to minimize the importance of context and to focus on the deep psychological nature of their experiences that may show the commonality of these experiences. Through talking to eight people (which is recommended as a “sound” number for phenomenology) I would be less influenced by the particularities of the working situation of each person.

Another popular approach is Grounded Theory. Originally grounded theory was designed to study social processes “from the bottom up”, and on face value that seems to resonate with what I was trying to do. However, it can be said that when grounded theory is applied to questions of the nature of experience the grounded theory method is reduced to a technique for systematic categorization, something which is not the focus of my interest. Stanley and Wise (1983 p.152) have further criticized grounded theory for being a form of inductivist positivism. While I would not necessarily support that stance in relation to more recent versions of grounded theory approaches (e.g. Charmaz, 2000), the idea of generating a theory is something I was not interested in as part of my exploration of the phenomenon. More fundamentally I wanted to avoid another theory or "wise" perspective on the issue of matching, being more interested in presenting the perspective of the user of the coaching service, the coachee. So there were too many points of mismatch between the grounded theory approach and my phenomenological research question.

Of course, another approach to investigate a phenomenon would be to study the way in which people negotiate their meanings in conversation with another and employ some form of discursive analysis. However valuable and interesting in principle, this approach can be criticized for the "lack of person" in the final "product" (Langridge, 2004:345). Clearly I am more interested in the "subjectivity" and the sense of self in the coachee's voice. Therefore this methodology was not appropriate.

Although my stance is naturally congruent with qualitative methods I did consider for some time adding a quantitative element to the research, in particular applying a quantitative measurement of the quality of the working relationship and how this might change over time. The tool that I have come across is called the Working Alliance Inventory. The Working Alliance Inventory (WAI) is based on Bordin's (1980) pan-theoretical, tripartite (bonds, goals, and tasks) conceptualization of the alliance. Data suggest that the WAI has adequate reliability, and is reliably correlated with a variety of counsellor and client self-reported outcome measures. It has been used extensively in the counselling and therapeutic world but only a few researchers have used it in related disciplines such as coaching. The WAI is presented as a reliable, valid and robust tool that has been cited in a number of studies (Hanson and Poston, 2010; Monuska, 2010). For my purposes it appeared to have some limitations, e.g. somewhat lengthy. It was also designed to be used in a therapy context rather than a coaching context. Admittedly there is similarity in the two disciplines and others have promoted the use of the WAI in coaching, for example (Duckworth and de Haan 2009, p.67) "One option might be to use this adapted WAI as a key to assessing and improving our coach/client relationships." So to investigate whether the WAI was appropriate to use in coaching and my research question, I carried out a small trial using the WAI with coaches and coachees and came to the conclusion that while it seemed a potentially valid and reliable tool, using it would change the open and coachee-led nature of the conversations I wanted to have with them. It would potentially risk "leading" their thinking and literally may put words, phrases and concepts into their consciousness that they may not have been previously articulated and so would have impacted on my capacity to give true voice to the coachee perspective.

As can be seen there were a number of approaches available and potentially applicable to my research areas, but the phenomenological and interpretative phenomenological approaches most clearly matches my thoughts on coaching and my philosophy of inquiry that one of them has clearly emerged as the approach I have decided to employ.

**3.4 Research plan**

Having read other researchers' accounts of their experience and thinking about the practical challenges I would face, I opted for semi-structured, one-to-one interviews. They are easily managed, allow a rapport to be developed and, when conducted well, give participants the space to think, speak and be heard. The relational nature also, in my opinion, mirrors some of the experiences of coaching and so should feel natural and obvious for the participants.

The full template of questions that structured the interviews is shown in the appendix (i). The following examples illustrate the style of questions used:

- *How much do you know about coaching and what initial views do you have about coaching? Have you received coaching and/or mentoring in the past*
- *Why coaching now for you? Was or is there a triggering event?*
- *Please describe in your own wards how you anticipate the coaching helping you?*
- *Please describe your initial experiences of your prospective coaches?*
- *Please can you describe how you arrived at that decision?*
- *When we spoke at the start of this process you said you were looking for a coach who____________________________________ (insert what they had articulated) how much of the support they have provided you would you describe in these terms?*
- *Reflecting on that do you think you would have articulated a different set of requirements for your coach? If so what might they be?*

My proposition was to hear from coachees at three key points about their journey with coaching so that I captured the "journey" they went on rather than simply their thoughts at one particular point in time. Firstly to speak to them just at the point that coaching had been decided up (either by them, their organization or jointly) and to capture their thoughts on what they were looking for in their coach (and coaching). This was the first dialogue with them and was dialogue 1. Following a classical matching process (see description in The Introduction) I then wanted to talk to them after they had been offered a choice of coaches and made their decision as to which coach to work with. This was my second dialogue with them and was dialogue 2. However, with the time between events and other practical issues around meetings, dialogue1 and dialogue 2 occurred at the same point, and from now on will be referred to as Interview 1 +2. As will be reflected in the Discussion chapter, while this decision was necessary and pragmatic it was with some potential impact on the immediacy and "accuracy" of reporting that could be given by the participants when reflecting back over a slightly longer period of time.

Another key area of interest was how the choice and decision that coachees make about their coach is a decision made at a particular point in time and at a particular point in their understanding and anticipation of coaching. As mentioned in the literature review I therefore wanted to look at that decision in the context of a different point of time – when they were in the middle of receiving coaching. The aim of this interview was to hear how the coachees describe what they were experiencing in the coaching and how the coach was "helping/working" with them and also to ask them to reflect back on their earlier decision on their coach. This was my third and final dialogue with them during my second interview with them (to cover dialogue 3).

The interview questions were piloted with colleagues and peers before conducting two mini-pilots with coachees that I naturally came into contact with and who were at the same point in the coaching journey as my participants would be. The learning from these pilots allowed me to refine, change the order and flow and remove any obvious closed or leading questions. For example the issue of gender of the coach was something that I explicitly asked in the trial interviews and then was changed to a more open question about what aspects of the coach and their background were important, only adding gender as an example if they had exhausted their response to the more open question. As anticipated, one of the key challenges was in bracketing off my assumptions about the content of the answers. Allowing the participants to tell me what it is like to live in their personal world was something I continually reminded myself of at the start of each interview.

**3.5 Sample and recruitment**

In accordance with my research design, my epistemological position, and IPA best practice my approach to sampling was that I needed as many participants as it takes to illuminate the phenomenon (Wertz, 1984). Langridge (2007) states that IPA research tends to be idiographic, with small sample sizes (the norm being 5 or 6 participants). Langridge goes on to say that unlike descriptive phenomenology, where maximum variation sampling is common, IPA researchers usually employ fairly homogeneous samples. The sampling is therefore purposive rather than random, the aim being to gather detailed information about the experience of a fairly specific group on a fairly specific topic. Smith et al (2009) believe that sampling must be theoretically consistent with the qualitative paradigm in general, and with IPA's orientation in particular. This means that samples are selected purposively because they can offer a research project insight into a particular experience. Participants are selected on the basis that they can grant access to a particular perspective rather than a population.

To attract participants I approached colleagues and contacts in my network that I knew had access to my preferred participant population, i.e. those in leadership positions who are about to start coaching in the next few months. Following Oxford Brookes protocol an information sheet (see appendix ii) was provided which was then shared with this network. In terms of any purposive criteria for selection participants I wanted to ensure that all participants were not coming from the same organisation or sector and that there was a mixture of gender and age. This was to minimise the focus on those variables in the analysis. This mixture of participants naturally emerged from my network. Early on two participants were rejected, one because I knew the participant too well and was concerned that I would not be able to "bracket" that knowledge and understanding of them, and another participant because it had been over a year since they had made a decision about which coach to work with and I felt that the separation in time would impact on their ability to recall and differentiate their thoughts at the different stages of the journey to choosing a coach.

A key issue in sampling for some qualitative designs is data saturation, e.g. Grounded Theory (Willig 2008). Saunders (2012) suggests that it is important to state clearly how many interviews were undertaken before data saturation was reached. Data saturation, which is described often as "no new themes emerging" (Turner, Barlow and Ilbery) et al 2002) is seen in IPA as a problematic concept. Brocki and Wearden (2006) reference how Smith et al. (1999) comment on the cyclical or iterative nature of analysis, in which passages are analysed repeatedly in the light of insights obtained from other sources. This is a process that could theoretically continue ad infinitum. In qualitative research, it is always possible that the next interview might be the one to produce confounding evidence and it is therefore important that researchers acknowledge limits to the representational nature of their data. According to Elliott, Fischer and Rennie (1999), qualitative research should strive to achieve "understanding represented in a way that achieves coherence and integration while preserving nuances… and perhaps it is when the researcher feels that their analysis has achieved these goals whilst telling a suitably persuasive story that the analysis may be considered sufficiently complete" (pp. 222–223). Giorgi (2009) and Englander (2012) point out that in PA/IPA the concept of representativeness is very much up to the researcher feeling confident that those interviewed are shining enough light on the subject to have plausible generality to other individuals who have experienced the same, or perhaps a similar phenomenon.

Using the best practice advice mentioned earlier (Langridge 2007), I was happy when I had reached eight suitable participants. The sampling strategy was successful in identifying leaders about to embark on appropriate and representative experiences of matching and coaching that proved to be insightful.

### 3.6 The participants

A brief biographical portrait of the participants is shown below – please note their real names have been changed to protect anonymity:

*Table (y) participant information*

| Name | Biographical Profile | Researcher Commentary on participants |
|---|---|---|
| Gary | Gary is a male, from Ireland, aged between 30-35. He works in an investment bank within their fixed income department, and more specifically within their foreign exchange business. He runs the trading desk within the options product group and manages a team of 10 traders. | Gary was an engaging interlocutor who was very objective, pragmatic and goal focused in his first interviews. He was noticeably broader in his understanding of coaching in interview and mode subjective in his description of how it was helping him. He had nearly completed his coaching and had received around 10 sessions. |
| Amy | Amy works for an investment bank, heading up marketing supporting a start-up of a new line of business for the investment bank. Amy is a white female, English and aged between 35-40. She has a team of 3 ½ at the moment, two in London and one and a half in Zurich. | Amy was very supportive and interested to talk about her experience. She talked fast and expansively around the questions and had made quite a discovery about her coaching needs and how her expectation of a coach was changed through meeting alternative profiles. Still in the middle of the coaching Amy had received 6 sessions. |
| Aarti | Aarti is of mixed Indian and Canadian heritage but has been working in the UK for over 5 years. His role is split between his activity as a GP and also part of a company made up of 70 other GP practices, where he has particular responsibility for research in some medical disciplines. In addition he is representing his organization on some national panels looking at the commissioning process. Doesn't manage anyone presently. Aged between 40-45. | Aarti was very talkative and wanted to contextualize everything to his work and his career plans. In the first interview was very intellectual and logical in his anticipation of coaching. In interview three he had clearly had big insights as to how coaching worked and how it can best support him. Only had 2 coaching sessions by interview 3. |

| | | |
|---|---|---|
| Liam | Liam is in a GP practice, of a fairly normal size GP practice with 6 partners who go about the business of general practice. The other part of his role which is very new to him is his becoming involved in the commissioning consortium which is where they are trying to get the GPs far more involved in commissioning services from secondary care community providers. 50% of his time is taken up with his GP work and being a partner in the practice and 50% with the commissioning work. At the GP practice he does manage people. Liam is white, English and aged between 40-45. | Liam was very helpful and supportive. His interviews were noticeably shorter both times, which reflected his pragmatic "let's make the best of it" perspective on coaching. He made a real discovery around his decision-making process. Only had 2 coaching sessions by interview 3. |
| Christine | Christine is a learning and development manager. She doesn't manage people directly but every time she manages a mission, or a customer demand she'll have a team of people working on it where she'll be the one steering that group of people. CT is aged between 40-45, female of French Moroccan background, who has been working in the UK over 5 years. | Christine was very knowledgeable about coaching and was really engaged in the topic and seemed to enjoy talk through all the questions. She had just completed her coaching support and had received around 8 sessions of support. I had met Christine once before the interview process. |
| Jane | Jane is a HR Director for a Global medical application group. She is responsible for all HR at a key manufacturing and distribution site based in Ireland. She manages a team of 4 people. Jane is aged 45-50, white, Irish, Female. | Jane was very talkative and wide ranging in the aspects of coaching that she wanted to talk about. Had been in a number of coaching relationships as part of her coaching training and had just completed her last relationship which had been over 6 sessions. |
| Mark | Mark is a Finance Director for one aspect of a Global Power Supply and Trading company. He manages a team of 20 people. He has moved roles a number of times within the business and uses coaching in parallel to support his team as well as himself. Mark is aged 40-45, white, male. | Mark had worked with four different coaches over the last five years and had also used the coach to support him individually and to support his team. He had just started working again with his first coach and was contracted to work with her on an ongoing basis for another year at least. I had met Mark a number of times and rapport was therefore easy. |
| Tony | Tony is a senior manager within a London NHS trust. He is currently working on special projects rather than a long term stable role. He does | Tony was initially quite reserved and almost guarded in his responses until he was reassured about the confidentiality and anonymity of our conversations. Once that |

| | | |
|---|---|---|
| | not line manage anybody. He is aged 45-50, Black Nigerian who has been in London for over 20years. | was established he was open and curious to explore his experiences. He was still receiving coaching and had 4 sessions of support with a further 4 to follow. |

Once a participant was identified (and s/he had been sent a quick summary of my research proposal – see appendix (ii), I then made contact via telephone to thank them for expressing an interest and explained in more detail what I intended to do and how they would be involved. This initial "briefing/contacting" call also allowed for some initial rapport to be built and any questions or concerns to be answered. Consent forms and formal invitations (see appendix iii) were then sent out and an interview was arranged. Given that participants were coming from all over the UK and given that the first interviews would be relatively short (somewhere between 20 to 40 minutes) I had anticipated that these interviews might need to take place over the telephone. The reality was that actually 7 of the 8 were conducted face to face. The only one that was conducted over the phone was because the participant was in Ireland and I am based in England.

**3.7 The interview**

In terms of the interviews, the questions within the schedule were used largely as a framework, with supplementary probing questions being used to facilitate in-depth reflection and narrative. This approach allowed the "voices" of actors to be surfaced, providing an account of how they constructed their personal versions of reality (Jabri and Pounder, 2001). As mentioned before the interviews, the purpose and format where explained during the contact and follow up email to all participants. This is what Lillis (1999 p.80) calls a "systemic field study protocol". The protocol was important for reducing the risk of the interviewer's expectations and opinions seeping into the interview process. Equally it was important not to say too much about the nature of the research as that could also "pollute" the participants thought process and story. This was also the case at the start of dialogue 1 and dialogue 2 (which were carried out at the same time) where I openly said to participants that I didn't want to say too much more in order not to influence them. This was because I was worried that if I explained more about the area of interest of my research and the issues I wished to investigate I would lead the discussion by sensitizing participants in relation to a topic or issue that may not necessarily be important to them. For example if I had mentioned that I was interested in how trust developed over time, trust would then be a word they would use or talk about, when they might not have chosen to without this influence. This comes back to the PA/IPA desire for the participants' "natural voice" to emerge.

Interview 3 was different as the transcripts from interview 1 and 2 were available and so the topic was more openly discussed in the room. However, still at Interview 3 I didn't want to lead the coachee or to have interpreted interview 1 and 2 unnecessarily or it would potentially influence how I conducted this interview. By this I mean that if I had reviewed the first interviews in too much detail I could start to interpret what they were saying and this could lead to an increase in leading questions or in conveying agreement or disagreement to what the participants were saying. Interview 3 was designed to take coachees back to what they said about choosing a coach and back to the decision they had made about their particular coach and ask them to reflect to see, with hindsight, how they viewed these earlier perspectives. The interview was also intended to ask them to think about any advice they would pass on to others who were about to embark on a coaching experience.

### 3.8 Data handling

With the permission of interviewees, all interviews were audio-recorded (Arkley and Knight, 1999; Bailey, 1996). Each interview was assigned a code, for example “Participant, 21 May 2011.” Where more than one interview took place on a specific date, the different interviews were identified by an alphabet character (Participant-B, 18 June 2011). As soon as possible after each interview I listened to the recording and made sure it was audible throughout. I deliberately did not want to listen in any great depth to the interviews until all first interviews were complete for fear of contaminating my thinking and then using this knowledge/insight to affect future interviews. My aim was to be led only by the participants’ experiences each time and not by my area of interest or forming ideas on what might or might not be happening for the participants as coachees. A key mantra was my aim to allow the voices of research participants/informants to speak. Bearing in mind that the “basic datum of phenomenology is the conscious human being” (Bentz and Shapiro, 1998, p. 98; Heron, 1996) or the lived experiences of the participants in the research, it is very important that the researcher must, to the greatest degree possible, prevent the data from being prematurely categorized or “pushed” into the researcher’s bias about the potential contribution of cooperative education in growing talent.

The words of caution by Easton, McComish and Greenberg (2000) that equipment failure and environmental conditions might seriously threaten the research undertaken, was borne in mind. They advise that the researcher must at all times ensure that recording equipment functions well and that spare batteries, tapes, and so on, are available. The interview setting must further be as free as possible from background noise and interruptions. The interview transcriptions and recording were all stored electronically on multiple hard drives in line with Oxford Brookes University requirement.

In appendix V a table is provided which shows when and where interviews were undertaken and shows, therefore, the gap that occurred between interviews.

### 3.9 Ethical issues

The one-to-one interview presents some ethical issues that need to be acknowledged. Key questions that I held myself accountable for throughout the data gathering process were:

*Was I asking for sensitive or confidential information*? The answer on face value was no, but what did emerge in three interviews was that the participants started to share quite sensitive information – for example that they had received therapy and why they had initiated therapy. What was critical in these types of situation was the confidential agreement between myself, as a researcher, and the participant. Therefore at the start of each interview I reminded them of this and also at the end sensitively reiterated this contract between us. I also think that my training as a chartered psychologist meant I was prepared, both professionally and emotionally to respond to these situations

*Were participants totally free to participate or do I have some hold over them?* While I did reflect on this and discuss it with my supervisors I was confident that in my recruitment process this was not an issue. I recruited participants through a range of networks and in each case the participant was required to proactively respond to my request to take part in the research. I also spoke to each individual personally (although in some cases over the phone) before we met for the interviews with no pressure exerted to participate. They were also free to withdraw at any point of the research (Elmes et al. 1995).

*Were participants truly informed about my research before they gave consent?* I ensured that all participants were sent the background-briefing document and also I checked that they had read this and asked for questions before the interview was set up. However, as I have mentioned earlier I had to keep some angles of my research interest opaque so as not to influence the interviews. The need for this was explained to participants. I was careful to avoid what Rosenblatt (1995) calls 'processual consent'.

*Are cultural differences an issue?* At this stage I have not been aware of this although one particular participant did make reference to his culture and its relevance to his coaching needs and so I was more sensitive to this issue in particular with him. Also his language and dialect meant I had to pay extra attention when transcribing his interviews. I recognize that this example of the participant's ethnic background is quite a restricted view of culture however. In reviewing the process I used and in listening back to the interviews aside from this one participant explicitly mentioning his culture I can "hear" cultural differences having impacted on my research.

*How can I best ensure respondent anonymity and confidentiality?* This was done through the coding process and changing the participants' names.

Finally in relation to ethics it is worth pointing out that most of the professional bodies in Coaching, particularly those in relation to Coaching Psychology have a set of ethics and guidelines. For example In the International Society for Coaching Psychology practice, members are required to consider their own professional competence, apply ethical principles, and maintain good coaching relationships with their coachees and other stakeholders. To guide members to apply ethical principles into practice, this Code (see http://www.isfcp.net/ethics.html) consists of two parts:

- Code of Ethics
- Guide to Coaching Psychology Practice

The Code of Ethics sets out the core values and guiding principles to inform the professional practice of coaching psychologists. The Guide to Coaching Psychology Practice aims to outline the expected standards of good practice that embody those principles. This Code of Ethics and Practice binds all members of ISCP.

Having found out who the coaches were and investigating their backgrounds, training and professional associations I had reasonable confidence that that these guidelines are being applied by coaches. Arguably I could have pursued this point and asked to check if the coaches were formally signed up to a code of practice. As a professional coaching psychologist myself and working with my Brookes supervisors as well as an independent professional coach supervisor for my own coaching work I am confident that my research was in line with these codes of practice and importantly that I was not simply learning the ethical rules but acting and behaving in an ethically committed fashion (Brinkmann and Kvale 2008).

**3.10 Reflexivity**

Qualitative researchers are not "passive receptacles into which data are poured" (Charmaz 2006, p.15) but are often referred to as the instrument of measurement (Patton 2002, Goulding, 2002). Throughout the process I have tried to operate with honesty and integrity and have been mindful of being professional in planning and delivering all aspects of the process. This has been achieved by constant self-questioning of my own choices, decisions and performance in conducting the interviews. Shown below are some of the key experiences and challenges I encountered:

*Thinking the recorder was not on* – despite being warned by my colleagues about checking the digital recorder, half way into my first formal interview I became aware that the light was not on the recorder. I then started to get distracted thinking about whether to stop the interview to check, but I was conscious that the participant was in mid-flow and had limited time. More critically I was aware that in worrying about the issue I was not paying full attention to the participant. I quickly decided to ignore the issue and focus on the person in front of me. It turned out that the recorder was working and that a light isn't on when it is recording. The lesson learnt was to actively check the recorder with the participant at the start of the interview, and also to have the recorder at the side of the table so that neither researcher nor participant were distracted.

*Participants continued to talk once the recorder was off* ("the therapist door knob moment"). Again, while I was aware that some therapists describe the most revealing part of the sessions when the patient is turning the knob on the door to go, in the first few interviews I was not alert to it in my interview process. Therefore, once the interview had formally stopped and I had turned off the recorder the participants started to re-open the discussion and talk about some significant issues. I decided to not turn the recorder on, as it would have been interrupting the flow and signposting my interest so I had to just rely on my memory of what had been said. The learning moving forward was to leave the recorder on until the participant had left the room completely. I did this from interview 3 onwards.

*Using leading questions* - especially when someone didn't have much to say – this didn't happen that often but there were some instances where a participant was particularly quiet or had relatively little to say about their choice of coach. I was then conscious of a tendency to want to prove or push further when actually the more pure phenomenological perspective was to continue with open questions and accept if they had little to say as that was their experience of the issue and their story. The key learning was to be prepared for people who would have little to say, to have some open questions to give them more space and also to accept that this may be all they want to say. I particularly noticed that with Interview 3. I had to be even more careful not to put words in the participant's mouths or make connections before they did. This was affected by the need to replay the first two interviews before the third interview.

*Being patient in finding participants* – given the pressure on deadlines and the desire to complete the interview process by a particular point in time one of the biggest challenges was finding participants who matched the profile (see appendix i) I was looking for to take part in the research. As I needed to talk to coachees at quite a specific point in time that limited my access to willing participants. The temptation was to compromise on my criteria, for example to talk to people after they had made their choice. However, I resisted the temptation as it would have changed the sample and nature of my investigation, and simply remained patient with periods of not being able to recruit new participants.

*Not being able to control the space in which the interview was conducted* – in most situations the meeting occurred in the participants' office environment. Although I had asked them to think about a quiet confidential setting, there were occasions where the only practical place to me was a hotel lobby or coffee area. While this was far from ideal, in all but one occasion I had checked the venue out and ensured we could talk privately and without interruption. There was however one occasion when the participant had not been able to book a room and so we had to go to a coffee shop around the corner. We checked that the space was confidential and I checked that the participant was totally comfortable talking, which she was. However there was a lot of background noise (music being piped) and this made it harder for us both to concentrate in the interview and particularly hard to transcribe the interview.

**3.11 Data analysis**

For analysis of date I made the decision to use Hycner's (1999) explicitation process. Outlined below are the five "steps" or phases informing this approach. Hycner at the same time cautions that "analysis" has dangerous connotations for phenomenology. The "term analysis usually means a "breaking into parts" and therefore often means a loss of the whole phenomenon, whereas explicitation implies investigation of the constituents of the phenomenon while keeping the context of the whole" (1999, p.161). The following are five "steps" or phases, which follow the IPA approach to "analysis":

1) Bracketing and phenomenological reduction.
2) Delineating units of meaning.
3) Clustering of units of meaning to form themes.
4) Summarizing each interview, validating it and where necessary modifying it.
5) Extracting general and unique themes from all the interviews and making a composite

***3.11.1 Bracketing and phenomenological reduction***. The term reduction, coined by Husserl (1931), is regarded by Hycner (1999) as unfortunate, because it has nothing to do with the reductionist natural science methodology. He felt it would do a great injustice to human phenomena through over-analysis, removal from the lived contexts of the phenomena and worse possibly reducing phenomena to cause and effect. Phenomenological reduction "to pure subjectivity" (Lauer, 1958, p.

50), instead, is a deliberate and purposeful opening by the researcher to the phenomenon "in its own right with its own meaning" (Fouche, 1993; Hycner, 1999). Reduction further points to a suspension or "bracketing out" (or *epoché*), "in a sense that in its regard no position is taken either for or against" (Lauer, 1958, p. 49), the researcher's own presuppositions and not allowing the researcher's meanings and interpretations or theoretical concepts to enter the unique world of the informant/participant (Creswell, 1998, pp. 54 and 113; Moustakas, 1994, p. 90; Sadala and Adorno, 2001). This is a different conception of the term bracketing used when interviewing to bracket the phenomenon researched for the interviewee. Here it refers to the bracketing of the researcher's personal views or preconceptions (Miller and Crabtree, 1992). Holloway (1997) and Hycner (1999) recommend that the researcher listen repeatedly to the audio recording of each interview to become familiar with the words of the interviewee/informant in order to develop a holistic sense, the "gestalt". Zinker (1978) explains that the term phenomenological implies a process, which emphasizes the unique own experiences of research participants. The here and now dimensions of those personal experiences gives phenomena existential immediacy. This immersion in the data and holding on to a bracketing perspective really allowed the story of the participants to emerge freely rather than be imposed according to my structure or perspective.

***3.11.2 Delineating units of meaning***. This is a critical phase of explicating the data. The statements that are seen to illuminate the researched phenomenon are extracted or "isolated" (Creswell, 1998; Holloway, 1997; Hycner, 1999). The researcher is required to make a substantial amount of judgement calls while consciously bracketing her/his own presuppositions in order to avoid inappropriate subjective judgements. The list of units of relevant meaning extracted from each interview is carefully scrutinized and the clearly redundant units eliminated (Moustakas, 1994). To do this the researcher considers the literal content, the number (the significance) of times a meaning was mentioned and also how (non-verbal or paralinguistic cues) it was stated. The actual meaning of two seemingly similar units of meaning might be different in terms of weight or chronology of events (Hycner, 1999).

***3.11.3 Clustering of units of meaning to form themes***. With the list of non-redundant units of meaning in hand the researcher must again bracket her or his presuppositions in order to remain true to the phenomenon. By rigorously examining the list of units of meaning the researcher tries to elicit the essence of meaning of units within the holistic context. Hycner (1999) remarks that this calls for even more judgement and skill on the part of the researcher. Colaizzi (Hycner, 1999, pp.

150-151), makes the following remark about the researcher's "artistic" judgement here: "Particularly in this step is the phenomenological researcher engaged in something which cannot be precisely delineated, for here he is involved in that ineffable thing known as creative insight".

Clusters of themes are typically formed by grouping units of meaning together (Creswell, 1998; King, 1994; Moustakas, 1994) and the researcher identifies significant topics, also called units of significance (Sadala and Adorno, 2001). Both Holloway (1997) and Hycner (1999) emphasize the importance of the researcher going back to the recorded interview (the gestalt) and forth to the list of non-redundant units of meaning to derive clusters of appropriate meaning. Often there is overlap in the clusters, which can be expected, considering the nature of human phenomena. By interrogating the meaning of the various clusters, central themes are determined, "which express the essence of these clusters" (Hycner, 1999, p. 153).

This gestalt effect is something that definitely occurred for me as I found that after listening to the data I was starting to interpret the data from isolated bits of speech and in response to specific questions and as I comment later this led to some initial conclusions and interpretations of the data which were disjointed and lacking context and meaning. It was only when I listened to the interviews in full again that a "real and natural" picture emerged of the participant's experience. Coffey and Atkinson (1996) and King (1994) remark that many qualitative analyses can be supported by a number of personal computer software packages that have been developed since the 1980s. However, "there is no one software package that will do the analysis in itself" (Coffey and Atkinson, 1996, p. 169) and the understanding of the meaning of phenomena "cannot be computerized because it is not an algorithmic process" (Kelle, 1995, p. 3). In other forms of qualitative research, software packages (such as ATLAS.ti, NUD*IST, The Ethnograph) can be used to ease the laborious task of analysing text-based data (Kelle, 1995) through rapid and sophisticated searches, line-by-line coding, and so on. However, these programmes do not help when conducting a phenomenological analysis.

***3.11.4 Summarize each interview, validate and modify***. A summary that incorporates all the themes elicited from the data gives a holistic context. Ellenberger captures it as follows: Whatever the method used for a phenomenological analysis the aim of the investigator is the reconstruction of the inner world of experience of the subject. Each individual has his own way of experiencing temporality, spatiality, materiality, but each of these coordinates must be understood in relation to the others and to the total inner "world" (Hycner, 1999, pp. 153-154). At this point the researcher conducts a "validity check" by returning to the informant to determine if the essence of the interview has been correctly "captured" (Hycner, 1999, p. 154). Any modification necessary is done as result of this “validity check”. I offered the chance to review the transcripts after each time but only two participants chose to review and they only did this after the first interviews, I also offered them the chance to conduct the “validity check” described but no one wanted to. I take this to be an artefact of both how busy they were and also a level of trust in my authenticity and integrity in relation to their data.

***3.11.5 General and unique themes for all the interviews and composite summary*.** Once the process outlined in points 1 through 4 has been done for all the interviews, the researcher looks “for the themes common to most or all of the interviews as well as the individual variations” (Hycner, 1999, p. 154). Care must be taken not to cluster common themes if significant differences exist. The unique or minority voices are important counterpoints to bring out regarding the phenomenon researched. The researcher concludes the explicitation by writing a composite summary, which must reflect the context or “horizon” from which the themes emerged (Hycner, 1999; Moustakas, 1994). According to Sadala and Adorno (2001, p. 289) the researcher, at this point “transforms participants’ everyday expressions into expressions appropriate to the scientific discourse supporting the research”. However, Coffey and Atkinson (1996, p. 139) emphasize that “good research is not generated by rigorous data alone … [but] “going beyond” the data to develop ideas”. Initial theorizing, however small, is derived from the qualitative data.

This approach “in action” will be described in the next chapter as the data are analysed.

### 3.12 Quality indicators for IPA research

Establishing the quality of qualitative data has proved challenging and is still the focus of much debate with numerous criteria proposed (Bryman, 2008). One proposal is to adopt the terms of the positivistic paradigm but to translate criteria into the language and philosophical assumptions of qualitative research in order to be “convincing” (Mason, 1996 p.145). In a recent article on research and practice in coaching psychology Saunders and Rojon (2014) provide the following helpful descriptions of reliability and validity:

> “A method is valid when the procedure or procedures used to collect the data accurately measure what they are intended to measure and, subsequently, the analysis is appropriate for the data collected, and the findings reported are really about what they profess to be about.”
>
> “A method is reliable when the data collection technique or techniques used yield consistent data and the analysis procedures, if repeated, would give the same results.”

However, any consideration of reliability and validity must begin by acknowledging that phenomenological research methodology (PA or IPA) is based upon different metatheoretical assumptions to those used in natural science (Wertz, 1986). Phenomenological research aims at the elucidation of meaning and understanding of human existence from an individuals' point of view. Natural science methodology looks for statistical generalisability while phenomenological research strives for empathetic generalisability (Giorgi, 1986). It is looking to ensure that the phenomenon feels understood and that understanding leads to plausible generality to other individuals who have experienced the same, or perhaps a similar phenomenon (Englander 2012).

An alternative approach is proposed by Lincoln and Guba (1985) who establish parallel concepts that can be used to evaluate any qualitative investigations. These criteria summarised in Table z are taken collectively to ensure trustworthiness of the research process.

*Table z – Qualitative quality criteria – based on Lincoln and Guba 1985; Trochim, 2006*

| **Traditional Criteria** | **Lincoln and Guba 1985** |
|---|---|
| Reliability | Dependability |
| External validity | Transferability |
| Objectivity | Confirmabiity |
| Internal validity | Credibility |

Schurink and Poggenpoel (1998) emphasize the truth-value of qualitative research and list a number of means to achieve trustworthiness. In this study, the phenomenological research design contributed toward trust and establishing a true perspective. Even though I was following an IPA approach I still wanted to attempt to "bracket" myself consciously (although this was extremely difficult) in order to understand, in terms of the perspectives of the participants interviewed the phenomenon that I was studying, that is "the focus [was] on an insider perspective" (Mouton and Marais, 1990, p. 70). The audio recordings made of each interview and again attempting to bracket myself during the transcription of the interview will further contribute to truth.

A different approach is advocated by Jones et al (2006) who propose the concept of “goodness” of qualitative research. They explain the importance of a coherent rationale linking epistemology and the choice of methodology and methods. They assert, “criteria become more specific according to epistemological views and methodological approaches” (Jones et al, 2006, p.120). This theme has been more extensively explained by Madill, Jordan and Shirley (2000) who argue that qualitative research can only be evaluated in accordance with the logic and epistemological position of it’s authors. Hycner, (1999) proposes criteria for evaluating IPA (Randomness; Limited number of participants; Generalisability; Accuracy of descriptions; Subjective influence of researcher), which I work through in the final chapter as way of discussing limitations to my study.

This brief discussion highlights that no single framework is consistently applied to qualitative data so it may ultimately come down to whether “the researcher is plausible and trustworthy” (McLeod, 2001). As a researcher then how do I persuade the reader of my integrity and honesty to gain the trust of the reader? A key question is also how I show that any conclusions I come to are reasonably fair and accurate. One way this was checked was by showing the conclusions to participants and a select group of peers. Whitty (2005) described the importance of demonstrating methodological rigour and dialectical critique and I think these sum up two important concepts, which the research was held up against. To conclude this discussion though I will use the Lincoln and Guba (1985) constructs to evaluate my research against.

### *3.12.1 Credibility*

It is argued that since the research is aimed at describing the phenomena of choice and matching from the coachee’s eyes, it is the coachee who is the one who can legitimately judge the credibility of findings. I largely agree with this and my main audience for the work is future/potential coachees about to embark on a coaching relationship. However, it is also important that those that are the gatekeepers for those potential receiving coaching also find the research as credible so that they pass it on and share with the coachees’. So credibility in the gatekeepers’ eyes is also important. Initial checks on this came from talking through my findings with around 10 of these gatekeepers as part of my day-to-day role in supporting them with matching coaches and coachees. Further feedback on this credibility will come as this thesis and research is further disseminated when complete.

### *3.12.2 Transferability*

Transferability is said to be the degree to which the results of qualitative research can be generalized or transferred to other contexts or settings. Generalisability, for a phenomenological approach to human experience, is based upon empathetic understanding rather than statistical explanatory procedures, as mentioned earlier (Giorgi, 2009, Englander, 2012). Phenomenological research follows the tradition of descriptive science and not explanatory science (Giorgi, 1986). Exploration and description of human experience (coachees experience in my case) may well lead to later hypotheses testing but should not be thought of as an inferior preliminary step towards the ultimate goal of explanatory science. Descriptive science is a science in its own right (Osborne, 1990) where generalisability is established *a posteriori* rather than by *a priori* procedures based up on a sampling theory (Osbourne, 1990). It could be argued though that the method of analysis in IPA by embracing the role of the researcher' interpretation of data adds an explanatory element that helps the reader in their process of making sense of the findings.

From a qualitative perspective transferability is primarily the responsibility of the reader. As a qualitative researcher I aimed to enhance transferability by doing a thorough job of describing the research context and my assumptions that were central to the research. The person who wishes to "transfer" the results to a different context is then responsible for making the Judgement of how sensible the transfer is, post the research.

#### ***3.12.3 Dependability***

The idea of dependability is to account for the ever-changing context within which the research occurs. The researcher is responsible for describing the changes that occur in the setting and how these changes affected the way the researcher approached the study. I hope that in my literature review I have covered this adequately from an historical perspective, explaining the landscape of research and application in the matching of coaches and coachees and current thinking on how coachees have been advised to make decisions on. In my discussion section I aimed to ensure that the evolving context in which coaching and decisions about coaches are made is covered and reflected in the conclusions I draw.

#### ***3.12.4 Confirmability***

Confirmability refers to the degree to which the results could be confirmed or corroborated by others. There are a number of strategies for enhancing confirmability. One approach I took was to document the procedures for checking and rechecking the data throughout my study. Another approach was to ask peers who were also researchers to take a “devil's advocate” role with respect to the results, and this process was facilitated in the taught elements of my Doctorate at Oxford Brookes. I also disciplined myself to actively search for and describe *negative instances* that contradict prior observations. After the study, my supervisors assisted me in conducting a *data audit* that examines the data collection and analysis procedures and made judgements about the potential for bias or distortion. Once all interviews had been completed each participant was offered the opportunity to review the transcripts, to comment on accuracy and whether they felt they fairly reflected the conversation and their thoughts on the topic areas. Only two of the participants actively reviewed their transcripts (they wrote back with comment) and each time no changes were made to the content beyond some corrections to the job role information and biographical situation. When the thesis is completed I will be getting back in contact with participants to share my findings and to personally thank them for their contribution.

Another important criterion to judge the work against is to go back to my original literature review and see if the research adds value to the work that has been cited and that it responds to the gaps in the literature that were identified.

**3.13 Summary**

While I am a firm believer in the idea of polyvocality and the concept of a cacophony of voices (Thody, 2006) my research is very much focused on providing a voice to an under-represented population – to learn about the lived experience of the coachee in relation to the process of choosing a coach. That is why phenomenology (IPA) was an obvious research strategy.

This chapter has outlined the methodology used for the study and in the next chapter I present the data analysis and the findings that emerged. In the Discussion and Conclusion chapter I come back to revisit the overall findings by focusing on the reflexive researcher perspective.

## CHAPTER 4 - FINDINGS

*"Bring things back to themselves"* Edward Husserl.

As was outlined in the previous chapter I made a decision to use an Interpretative Phenomenological Analysis approach (IPA) and it is said that when it comes to analysis, phenomenological researchers engage in active and sustained reflection as they "dwell" with the data and interrogate it (Smith, 2006). In my mind I was constantly asking: "If a person has said this, what does this suggest of their experience of the situation in question?" Beyond this reflection process, different methodological variants of IPA promote either the use of systematic procedures or the spontaneous emergence of creative intuition, and so the precise form an analysis of research findings takes varies considerably (Giorgi, 2006). Each type of analysis and way of presenting the data simultaneously reveals and conceals. Different analyses highlight particular nuances and indicate various immanent possibilities of meaning as *figural* against a *ground* of other possible meanings (Moutstakas 1994). However rich and comprehensive, any one analysis is, inevitably incomplete, partial, tentative, emergent, open and uncertain, and this definitely mirrors my experience of the time I spent with my data and the analysis I present in this chapter.

The analytical process involved a seemingly endless process of reflective writing and rewriting. However, each time I engaged with this process it felt like I was gaining greater depth, whereby multiple layers of meaning were being exposed and laying bare certain truths while retaining the ambiguity of experience. To write phenomenologically is to write poetically, says van Manen (1990, p.132). It is the "untiring effort to author a sensitive grasp of being itself". The challenge for me was to capture both the complexity and ambiguity of the lived experiences being described by my participants.

As outlined and anticipated in previous chapters early in my readings around the PA and IPA approaches I became very attracted to Hycner's model of explicitation as I felt it was going to be the most effective approach to answering my research questions and also because it spoke to my philosophical assumptions and practical desires for analysing the data. However, I had never intended to approach the data by following a particular process rigidly, for as Keen (1975, P.41) states "unlike other methodologies, phenomenology cannot be reduced to a "cookbook" set of instructions. It is more an approach, an attitude, an investigative posture with a certain set of goals". This is a more accurate summary of the stance I took.

While not wanting to take a cookbook approach I did largely follow the five steps outlined by Hycner (1995 and 1999) and described in the previous chapter. It was important to start from a deep immersion in the data and this was achieved through, the inevitably slow process of undertaking all the transcription personally. Once this had been done I then started to explore each interview and each participant in turn. Recognizing that I was the main research instrument I sought to deploy that instrument by initially reducing the transcript to the responses that there relevant to my research – for example taking out some of the background conversation about their job and role or when they deviated to describing their relationship with their line manager or some logistical challenge around meeting their coach. This was not to completely disregard this data but to try and strip back the words and language to the most relevant to the research area. After this reduction I then further tried to summarize the data into key themes or summarize chunks of paragraphs into a few sentences. The aim being to reduce the data to its core ingredients and also to reduce it to a size that was manageable and in a "landscape" format that was easier to read and get a sense of the key picture of the message being conveyed.

This approach to the data is demonstrated in (appendix v) where it can be seen how the initial summarizing of the data was undertaken.

The next step was to take a slightly more creative approach. Having started to understand and experience the participants' worldviews, my aim was to give voice to the participants and the data to naturally emerge without imposing a predetermined structure. This ultimately led to the following initial view of the data. Inevitably this required a judgement call but I had worked hard to try and ensure that I was not "leading" the data or the analysis but rather that I was allowing the themes and voices to naturally emerge in relation to my research question. I experienced this constant need to strive to "bracket" my experience, knowledge and expectations as a very conscious effort.

**4.1 Introduction to the themes**

When I set out with my research, having studied the literature, I was particularly struck by the voice that was lacking in the research. Equally it appeared to me important to not just take a point in time perspective to how potential coachees were viewing the coaching they were about to embark on but to interview them more than once along that "journey" so I could learn more about what happened to their thinking about matching, coaching and their coach. After a period of analysing the data and producing a very rough first draft of my analysis I realized that this "journey" had somehow got lost and I found myself writing a number of, what appeared to be, disjointed perspectives. Therefore, following discussion with my supervisors I spent a further period of listening back to the original interviews. In this additional phase of immersion in the data I was struck by the relevance of Husserl's quote about bringing things back to themselves. From that point on the journey and the chronological story became relevant again.

In fact the findings from the data seem to naturally tell a story about the change in perspective that occurred over time and it is this progression that I will now present in this chapter as research findings. These findings are clustered around three main themes that emerged from the voices of the participants:

a) Those that came from their first thoughts on Coaching and prior to the coaching having commenced which I have called " **Themes from the Start**"

b) Those that I have labelled "**Themes from the Shift**" which came when they started receiving coaching.

c) Finally "**Themes of Choice**" which generally emerged as the participants reflected back on the journey they had been on and made suggestions and recommendations for those who might follow in their footsteps.

Later in the chapter I also present some more **individual findings** and **psychological understandings** that emerged but for now I will look at each of these themes in turn.

### 4.2 Themes from the start

Looking at the themes from the start reveals three interconnected observations. The first is concerned with the previous experiences coachees had had of coaching, or related services, which had an impact on what they were anticipating from coaching this time. This theme is discussed first. The second theme is to do with a finding that the coachees were not totally clear on what coaching was and that their expectation of coaching was more aligned with a definition of mentoring than it was with a definition of coaching. This theme is discussed in more detail later including the potential impact of this confusion over definition. The third theme describes potential criteria that participants used before coaching commenced.

#### *4.2.1 Previous experience*

A big topic of conversation that emerged quite quickly in dialogue with the coachees was that what they were thinking about in terms of the coach, who they wanted to work with and what they expected from coaching was framed very much by the previous experience, (or lack of), they had had of coaching and coaching-related interventions or relationships.

The participants' experiences of coaching varied significantly: some received coaching before, others never came across it. As I spent time with the data it emerged that what experience a coachee had had of coaching impacted on their expectation of a coach. This also included other coaching related experiences such as mentoring, counselling or if they had a manager or parent who may have consciously or unconsciously taken this approach.

For example Liam who had a short coaching intervention 5 years ago was generally very pragmatic about what he was looking for in a coach. He did acknowledge that probably a female coach was in his mind as that was the gender of the previous coach he had worked with:

> Err, maybe gender, and that's probably because my previous coach was female rather than anything else (Liam)

Gary had not had coaching himself before but had provided feedback to a coach who was working with his colleague. This meeting with a coach meant the frame of reference was very immediate and was that coach. So he then actively requested that person to be his coach. Amy who had been in a counselling/therapy relationship acknowledged that in thinking about what she wanted from a coach and what sort of coach she wanted was affected by this previous relationship. This included the framing of the gender of the coach that she was expecting to work with:

> I wanted someone like Wyndy {previous therapist} who can actually be quite brusque or bordering on rude, but actually challenged me and made me think. I guess I just didn't really want a softly softly woman. (Amy)

Aarti had never had a coach before but made a connection with the tutors that had supported him on his MBA and so was thinking about an MBA-experienced coach to support him. Christine, who although was training to be a coach, had not had coaching. She brought to mind a sports coach that she had worked with and also her experience of a caring and supportive parent, which she now likened to a coach on the basis of conversations she had had with people on her coach training course. She acknowledged that an image was somewhere in her mind because of these experiences, and that this was there when she went to meet prospective coaches.

> Yes, because the image I had from sports coaching, was the coach standing on the road when the guy's running a marathon. He's the one shouting "come on you can make it". That kind of faded away in thinking maybe, coaching within a business environment is a bit different to sport, or the image I had of sports coaching which is someone encouraging someone else to achieve their targets (Christine)

She realized when reflecting that she unconsciously wanted caring provocation and she got just that, just like she had with her mother – she even described her coach (who was also an older lady) as like a mother figure:

> Probably the image of care and affection in my mind very often comes with an image of my mum, so I didn't even think about it as a criterion. I think probably unconsciously the times where I had a very caring even coaching person that stood next to me and said "no I think you can do it", has always been my mum. And probably because she had lots of the entry points that she used a very similar kind of pattern to what my mum used to do with me when I was very young. Probably unconsciously I picked her, although it wasn't in my criteria *(*Christine)

So, as can be seen, her initial perspective on coaching was informed from the mental image she had of a coach, and for her this was primarily her mother as well as from other experiences of helping relationships.

Mark, who had worked with four different coaches, recognized that his experience of the previous coach each time refined his expectation of the next coach – both positively and negatively.

> I always find myself thinking about what the last coach had done for me, both in terms of what I wanted to continue and what I wanted to change or improve. (Mark)

Jane who had not had formal coaching before was much more interested in the personal connection as she reflected that it had been personal connections that had been more important to her in other key relationships. For Jane it was all about warmth and genuineness and making some sort of connection:

> On this particular day let it happen. (Jane)

Rapport was central for her and having a really immediate sense that she would or just wouldn't want to work with them:

> *…*Generally I just feel it, l describe it almost like an animal when a dog greets you because I had a dog and I often noticed how some people didn't like him and didn't want the dog near them. But the dog would continue and get some sense of something from that person and then becomes sort of growly around that person because they couldn't do that. And it's almost with this person they knew they couldn't get that rapport thing going or that thing that they needed that a dog needed and I sometimes feel for me a little bit like that with people. *(*Jane)

So what was emerging was that their choice was being influenced by a past experience of perspective of a "similar" experience. While I was initially surprised at how much this was coming through as informing their choice, it is, on reflection, probably not that surprising as what other frame of reference could they draw on?

It is worth noting here though that for all of the participants these words came from reflecting back, with the aid of myself as the researcher. It is not clear if these thoughts were readily consciously available to them at the key points in their coaching journey. This is one of the most difficult research biases to avoid in many ways when relying upon interviews. With interviewer bias, the interviewer may subconsciously give subtle clues with their body language, or tone of voice, that subtly influence the subject into giving answers skewed towards the interviewer's own opinions, prejudices and values (Langridge, 2007). I don't think this was the issue in my research. However, it is worth being aware that what I may have generated in my analysis is the foregrounding of issues that may not be immediately at the forefront of typical coachee minds. Although this may well be what is of value from the research – to help future coachees become more conscious of the unconscious thought processes and ideas which will impact on what they request of coaching and their coach.

#### *4.2.2 Expecting coaching or mentoring?*

As this perspective emerged from the conversations with the coachees it also became apparent that there was some confusion about whether people were actually thinking about mentoring versus coaching**.** When I listened back to the interviews it became clear that most people were thinking about mentoring and a mentor when they started to list criteria they are looking for in their coach. This difference has a significant impact on what they consequently looked for in their coach and in their anticipation of the coaching relationship.

In the literature review I presented the definitions that are usually used to differentiate between mentoring and coaching (Grant, 2009). However, those definitions and differences are written, to some extent, from a perspective of knowledge about the two different interventions. Listening to the interviews it appears that the participants were mixing the terms: many times they used the term of coaching when they were actually describing mentoring. In addition, the use or understanding of the words is one of the big things that changes from the first interview to the final interview. They appear to shift from initially wanting mentor type qualities (experience, knowledge, advice) to realizing what coaching is really about and valuing more coach type qualities (relationship, trust, questioning). This can be linked back to what was presented in the literature review about the differences between mentoring and coaching and how these differences subtly impact issues such as matching and choice (Cox, 2007).

For example Amy's description of what she thought coaching was, appeared to show a pretty good appreciation of the core elements:

> Coaching is not telling someone how to do something, it's helping people work it out for themselves. So giving… I guess the toolset and the perspective to shape your own path forward if you like, that was, my overall view *(*Amy)

But as she starts to describe coaching further she starts to bring in a slightly more directive and "mentoring" type perspective:

> Someone who could help me with concrete examples or role plays of how to deal with ... challenging situations and also to work with me to make sure that my perception of situations was indeed reality or correct you know. To get to know me and get some feedback from others to make sure that I'm not completely you know, off track with what I'm looking to do and give me more insights (Amy)

Then as she describes the coach she wanted to work with:

> I'm quite petite umm and I didn't really want a nice soft spoken woman. I wanted a guy who could advise me on how to be a bit more bullish. But part of me was thinking umm, I don't want to be one of the men either. So that was my subconscious view if you like (Amy)

She then acknowledged herself that she had misinterpreted what coaching would do and how it works (even though she had had therapy) and confused it with mentoring.

> I guess I was looking for a male mentor coach to say, "Right let's look at this way...." The temptation was to go down the mentor route but that is the complete opposite of what I needed. *(*Amy)

As mentioned earlier this could simply reflect a wider misunderstanding about expectations around coaching. This confusion or misunderstanding is more my interpretation than their explicit comment (aside from Amy). However, it might explain the difference between what they expect to get from coaching (or mentoring) and what they then experience. Further this brings into question the use of language and the linguistic transferability of terms such as coaching (Clegg, 2005). How do we know how the average potential coachee differentiates between coaching and mentoring or what they are actually thinking about when the word coaching is being used? It is probably likely that this definition or understanding of coaching is different to the other "stakeholders" involved in setting up coaching, as the majority of them are experienced and familiar with coaching.

#### *4.2.3 Potential criteria*

This definition difference became clearer in the light of the **background-based criteria** that the participants seemingly used when looking for a coach, as appears at interview 1. Those who talked about criteria tended to do so in relation to 3 broad categories such as:

***Experience*** – Amy clarified though that *"experience means they can empathize with me and not that they've coached others", "they understand my situation".*

Aarti talked about the importance of not having to explain everything:

> [This] person would be ideal for me to work with because if they understand what the NHS is, they understand what the business world is and if they could help me meld this together. I wanted someone who would acknowledge that this is a very complicated, very politically driven umm system and if I'm trying to define a core coach or resource I need to understand that he or she has had experience of navigating through the murky world that is the NHS. *(*Aarti)

***Knowledge*** – Aarti was clear about the knowledge needed to be routed in an MBA, because he had an MBA and he noticed those who had an MBA seemed to coach more senior people and this becam a significant criterion for him:

> I noticed that the ones who hold MBA's tend to coach at higher level based on the coaching assignments they had undertaken and I took it as a sign that as someone who would be able to elevate my abilities or to help me with my abilities to a much higher standard than otherwise, so that was one *(*Aarti)

Mark talked about it more in terms of the coach being experienced in the issues he was facing and the culture in which he was facing within his organization.

> I've realized that it helps a lot if they know your world and the challenges you're facing so they can grip with my issues quicker and also understand the dynamics I describe. *(*Mark)

Tony has some interesting observations on the differences between coaching and mentoring as he has an internal mentor and was about to get an external coach. He could see that the challenge for an external coach is how they really understand his challenges at work (hence his appreciation that his coach had coached people in his organization). However, he felt that their advantage over a mentor is that he could safely discuss issues that he wouldn't normally raise with his line manager:

> Opportunity to talk about work points which you not normally talk about without being judgemental or forcing you. Someone who you can safely discuss issues that you would not normally want to raise within your line management. I just wanted someone with senior manager experience, senior level management experience who is familiar to the industry and understanding the working of the NHS. *(*Tony)

***Gender*** – Amy had some real insights about initially wanting a male coach, partly because her therapist had been a man and she wanted someone similar who could "advise me", and partly because she is surrounded by men at work and works in a very male culture of trading and investing where her biggest relationship challenges at work are with men and how they react to her as a woman:

> In my mind I thought I want a guy, first of all because I don't want a so called, how do I put this... I don't want a soft, you know "oh yes we're all be collaborative (*using an exaggerated girly voice*) type woman. I wanted someone who can actually be quite brusque or bordering on rude but actually challenged me *(*Amy)

She described how she was even reluctant to meet them (but she trusted her colleagues' experience in making recommendations and trusted the process) but when she did she changed her mind straight away. She then saw she could have empathy and it not being a soft touch. Quickly she also got a very positive transference and realized she could be herself totally with her coach and this was really important as she spent all her time at work putting on a face and a show *"I'm not a lost case, I'm not alone*". Further she saw something in the coach that she wanted to emulate:

> There was more of a calm confidence about her and that's something that I'm looking to emulate I guess. Yeah, that's a quality that I admire *(*Amy)

Tony was another key example. He initially believed that a female coach was what he needed as:

> There's a lot of females in senior positions now and I wanted to know what is their thinking and how are these ladies being developed, how are they being taught, what kind of mindset do they have, would be a good thing for me as a man and how would I know more about them? *(*Tony)

In the end he chose a male coach because he believed he had more breadth of experience. Tony was switching around between all three categories mentioned above. At times one was more important than the others but they all remained as factual rational criteria. The three criteria mentioned above correspond quite strongly to Joyce and Neals (2010, 2012) research on matching.

In particular the criteria they call credibility. Credibility is said to address the "what" question for clients, in "does the coach have what it takes to assist the client in being successful?" They believe that the client's perception of the coach's qualifications and experiences influences the degree to which trust is enhanced. In the three criteria cited above it could be said that this was their way of increasing the likelihood they could trust the coach helping them to be successful. As can be seen this is a much richer picture than simply credibility and has subtle variations for each participant. However, if one wanted to use an umbrella term for these criteria, Credibility has reasonable face validity as a term.

#### *4.2.4 Summary*

In summary, the potential coachee's experience of a coach or a coaching related relationship appeared to frame their expectation of future relationships not only in terms of the how it would help them and how they might use it, but also in terms of whom they would want to work with. In spending time with the participants and in immersing myself in the interviews afterwards I think it can be argued that this expectation (which may be more subconscious than conscious) has a subtle but potentially powerful impact on what they describe they are looking for in a coach, which in many cases influenced who they have been introduced to. It appears that all but Christine of the participants were describing qualities and criteria that would fit more naturally with an expectation of a mentoring type relationship, which suggests that some people are unclear about how a coach will really work with them and in the absence of this experience or knowledge they hold a more generalized mentoring helping relationship perspective. It is also worth noting that some of the people aiding, supporting and introducing the coachees to coaches did not always simply respond to the requested coach profile or description of coach qualities and characteristics and instead introduced opposite profiles of coach, for example Amy got offered two female coaches when she asked for only male and Tony was offered a male coach when he had requested a female coach. The implications of this are discussed in the next chapter.

This was however just one point in the participants' experience of coaching, and was particular to the first phase of their coaching relationship. Central to my research design and significant in my research question was to explore what emerged from the interviews when I met them for a second time and they had both received coaching as well as reflected on their experience of coaching.

### 4.3 Themes after the shift

In conducting the interviews between two to four months after my initial conversation it was at a point when participants were now in a coaching relationship. As can be seen in the previous table

(table y pages 57-58), describing the coachees, some had only had one coaching session while others had received eight to ten sessions. It was noticeable how significantly the coachees moved on in their understanding of the importance of the connection and the chemistry between coach and coachee. Something that was rarely cited as important at interview 1 and 2 became a strong message emerging from all participants. This emerges against a backdrop of the importance of the human relationship and the connection not being anticipated. It is quite explicit that once participants seem to make this discovery (through engaging in the coaching relationship) they talk about the importance of these new factors which seem to fall into the following categories: The Touch, The Trust and The Relationship (as compared to the initial categories that I labelled as experience, knowledge and gender). In this next section I explore the data in relation to this discovery and contrast this against how the coachees were anticipating what they needed from their coach prior to the work starting.

### *4.3.1 The Touch*

Gary in the first interview had appeared very objective and outcome-focused in his description of what he was looking for in a coach and coaching, as can be seen in the quote below:

> My views on coaching...I looked at upon it as a tool to accomplish an end goal, so my take on the environment that I work in is that you get rewarded for certain actions you do or for certain goals but to get up to the scale in terms of ownership of the business you need to be doing the right things on a management kind of level. I'm communicating and interacting more with customers and sales people, so I need to polish my skill set and sharpen my tools a bit in that department, so I viewed coaching as to me a means to facilitate my arriving at that point (Gary)

By the second time I met him he was clearly reflecting on how his coach was helping him in a very different way as the quote below illustrates:

> …in a practical sense the coaching to me is a means to an end so what I was looking for in terms of a coach then would be a person I could see fit to conduct that job and um someone who would effectively be very effective in that. So you know, a little bit less fluffy a little bit more straight to the point *(*Gary)

In the second interview though he talked much more about the coach connection and in positive terms describes how "we just clicked". This is particularly interesting because he initially reported that his choice of coach was all about process and goals and yet now he can see that it is the "click" that really matters to him:

> I think in my case it was done on a very personal level so we had a good interaction between each other, we trusted each other very much. He reflected some, some you know good confidence in me, which kind of sped up the whole process I think *(*Gary)

There is also something important from a researcher perspective. When I first heard his story of choosing the coach I was struck by a strong sense of a very pragmatic decision – he was introduced to a coach by giving feedback to a coach on someone else he worked with and then thought: this person is good and works with lots of senior executives in his organization and so must know his organization and be good to work with all these other people. However, as I listened to the interview more it became clear that even in his first meeting with the coach, a personal connection was made. It was this personal connection which probably sowed the biggest seed for them working together, in spite of the logical rationale he presented.

> I initially had a feeling of umm comfort really the fact that he's been through the process and accomplished things and so the people that he mentioned to me were people very senior within my business. And so I guess I made the association of success there, so he definitely had a success rate with those people (Gary)

He then goes on to describe the other coach that he met and didn't choose to work with and it can be heard that it was as much the "comfort" in talking to him and the trust the other coach conveyed that was important for Gary.

Some of this might also be the language, which people are willing or comfortable to use talking about someone they don't know particularly well. It may also be that he was generally more comfortable or used to talking in objectivity-oriented language rather than personal and subjective. As I listened back to the interview it "feels" that at one point in the interview he seemed to want to talk about the connection and the similarity, as can be seen in the quote above, but then shifted back to expressing it in terms of who was the best person to get the job done and brought back his view on industry experience and knowing what was what in his world:

> If you present me with two choices the one I think that's the most efficient and will get me to B quicker is the one I'll take. I'm not going to take the one that meanders around, left and right, I'd rather take a road that goes straight there than kind of a scenic route. It struck me that from speaking to the first coach, who I chose, he, he seemed to me like he would get the job done, he seemed to me like he knew what I needed to accomplish, he knew what were the steps I needed to take in order to get to that point. Whereas the second candidate was just a little bit rounded a little bit less exact and didn't instil the confidence in me that

> he had done this in my company and possibly my industry as well with as great a success rate" (Gary)

Liam who was equally pragmatic and objective in arriving at an initial decision about which coach to work with, recognized in interview 3 the importance of the relationship and the coach understanding Liam as a "whole" person:

> I think the thing that has been helpful is the way she's managed to tie in, to understand my personal life and then tie that in with what I'm trying to achieve having the problems I'm having, the anxieties I'm having and tie the three together um is something that hadn't occurred to me. And she seemed to do this naturally and has been very useful. (Liam)

Christine, who was always clear that it was a relational decision that she needed to make about the coach describes in her own words what this human touch meant for her. What was important for Christine was having a sense that her coach was genuinely curious to know her more. She felt strongly that the relationship should not just be transactional but one based on a genuine interest from the coach. This could be said to be similar to Carl Rogers' (1951) core conditions, which determine the quality of the therapeutic relationship. They are unconditional positive regard and acceptance, accurate empathy, congruence/genuineness and non-possessive warmth:

> I could tell her anything and not be afraid how she would judge that how she would, or how she might have a less good opinion of me *(*Christine)

> She said she took the assignment because I value you as a person and I want to hear whatever you say I don't really mind so you can say whatever you want. So, for me that was important. *(*Christine)

Touch is the word that I have used to capture what I interpreted the voices of my participants have been expressing in these descriptions of what was important to them. Other authors who have spoken about this issue such as Boyce, Jackson and Neal (2009), have arguably used the label "Rapport" to cover the same concept.

#### *4.3.2 The Trust*

The **trust** (including issues of boundaries and confidentiality) was another important aspect of the relationship that came up for a number of participants in interview 3, notably for Tony and Christine. Christine, for example, talked of the need for the coach to be:

> Someone to understand me, to be that point of secure trust that I could trust, that could at least give me a sense of what's going on to then go for it *(*Christine)

And also:

> I want someone I can trust fully because it was a phase in my professional life where there were many people who I had trusted and actually, I could see there was evidence that I just misplaced my trust or I probably trusted too much. So that was a trigger for me I had to just do it in a completely independent way. *(*Christine)

For Christine one of the ways that this manifested itself was her desire for the coaching to be conducted out of the office and away from the physical environment.

Trust can be said to be one of those things that means different things to different people and can therefore be said to be subjective to evaluate and experience.

Tony was clear from the start that safety and confidentiality were important:

> I spent a bit of time reassuring myself that what I'm going to say and discuss is safe. I didn't want that compromised in any way and if I felt it was I probably would have declined the coaching. *(*Tony)

For Tony the issue of confidentiality was finely balanced, as one of the key criteria he had used to choose Andrew (his coach) had been his experience of the organization (interview 1) but he then said at interview 3 that if he had actually known that Andrew had coached some people that he knew, he might not have chosen him because of fears of boundaries and confidentiality. While Tony initially wanted the reassurance that Andrew had coached others in his organization, to give him confidence in his understanding of his situation, he then reflected and realized that meant Andrew would be potentially talking to people he might want to discuss in the coaching with Andrew:

> I think his knowledge of so many of those guys was a worry you know. If I had known he was working with some of them that would have probably made me think differently about the choice you know. *(*Tony)

Lowman (2005) claimed that the establishing and maintenance of trust is "critical to the success of a particular intervention" (p.94). When trust is present clients are arguably more likely to share sensitive information and coaches have greater influence over their clients (Gyllensten and Palmer, 2007; Kampa-Kokesch and Anderson, 2001). This is what I think is being described by my participants, particularly as articulated by Tony.

#### *4.3.3 The Relationship*

Another big shift was that the **relationship between coach and coachee** became a lot more important than what they had anticipated at interview 1. For example in interview 1 Gary started with a focus on a coach who can get the job done and who understands the inner working of his industry and his firm. In interview 3 he spoke about the fact that it was not the coach's industry or firm experience that has added the greatest value:

> I guess that with his level of coaching experience, it doesn't matter what your industry is. He should be able, from a behavioural aspect be able to help you… *(*Gary)

Although he did say that the fact that he knew certain people and knew how his company operates helped the relationship build quicker but it was important that it had been "done in a very personal level"

In interview 1 Aarti was quite dismissive of some advice his wife had given him about how to make the decision about which coach to choose because she had suggested to consider "how do you feel". He thought that the decision needed to be "more systematic than that". However, in interview 3 he realized that: *"it is the personal touch that is the differentiator – not the MBA – that is just the cherry on the cake"*. He also said he could let go of the coach having to have the NHS experience as he can get that type of support elsewhere.

Jane makes some really interesting points about the difference when one starts a relationship versus when the relationship is working. She had a view that one has different needs of the relationship at different points in the evolution of the relation. Jane talked about the shift from liking to respect:

> Over time you might not have to like them any more as long as you can respect them*. (*Jane).

She held a strong view that for her a friendly relationship is critical to start work. After that she appears to take the opposite shift to those described above and recognized that sometimes the relationship moves from liking to a relationship needed to achieve a result. So from her perspective the relationship changes from an initial friendship relationship into a client-coach relationship. Maybe both are what everybody is looking for, and maybe it is about the natural way that relationships evolve from the start to the working stage.

There is a growing body of writers and researchers in the coaching field who are strongly promoting the importance of "relational coaching". They cite numerous researchers, such as Allen, Poteet, Eby, Lentz, Lima (2004) who investigated mentoring outcomes and Baron and Morin (2009) studied predicated coaching outcomes where the crucial factor in effectiveness was the clients satisfaction with their coach or mentor. As was demonstrated in the literature, some practitioners and researchers have attempted to measure this through the Working Alliance Inventory (De Haan, 2011).

Christine made a big discovery when she talked about how the coach she worked with was right for her and her needs at that particular point in time, but that the same coach might not be right at another point in time. Liam also talked about the need being about a particular point in time and that the relationship between coach and coachee is right at a particular point in time but may not be right at a future point in time. Christine even admitted that although it had been fantastic coaching relationship she would not choose the same coach again:

> …If I were to choose a coach right now as we speak probably Jacques would not be that appropriate one. I'd probably go for, for Bertolt, because I think err part of my part of growing up is to okay put the emotions on the side a bit, and I think he could be probably a bit more challenging with me and a bit would push me harder. *(*Christine)

It appeared to be about connecting and understanding the person at that particular point in time with the particular needs they had for coaching at that point. This relationship was co-created by the two people at that point and it doesn't necessarily follow that a future relationship would be as effective or as relevant.

Mark talks about needing to believe in the benefits of coaching:

> The crucial thing is not only the skills and the knowledge and the background that people bring but obviously how you get on with them and you need to be comfortable talking to them *(*Mark)

He also talked about personally needing to get on with the coach. As he told the story of the different coaches that he has worked with, it appeared that those that have lasted the longest have been when Mark personally connected with the coach as well as the coach delivering the intervention he wanted. This realization, through experience helped him be more explicit in recognizing that he needs to be personally selective and subjective as well as trying to be objective about the likelihood of the coach assisting him in achieving his desired objectives for the coaching.

So what emerges from the voices of the coachees, the participants in this research, recognizes that once they are in coaching relationship the factors that matter most for them in the coaching change. The coachees move from the factual mentoring type criteria shown earlier to the more subjectively meaningful, personal coaching criteria described above. The implications of this shift for how coachees make coaching decisions are potentially quite significant and will be discussed in the next chapter.

The themes of the next section emerged from discussions at the end of the interviews about potential advice the participants might give to future coachees on the basis of their experiences of choosing the coach.

### 4.4 Themes of choice

The next themes of findings were about looking back with the participants on how they made choices and the decision on whom to work with. The general theme was that before they make a decision or as they are about to make a decision they are mainly focused on wanting to be objective and rational. However, when they discover that the coaching is less about factual rational factors and more about the trust, the touch and the relationship they can see how important it is to place equal, if not more attention to the personal, nebulous and subjective decision. Also when they reflect back, there is a consistent message expressed about wanting to advise the future coachees that “chemistry meetings” are critical. Further points are made about how constraints impact on the amount of choice that is available to coachees.

Before these findings are presented it is worth pointing out that they are slightly different in their nature from the previously described sets of themes. Previous themes are mainly based on the participants’ experiences. The following group of themes emerged in response to questions that required the participants to conceptualize and analyse their experience for the benefit of others. Although participants shared their thinking and reflections, which are based on their experiences, the themes appear to be more opinion-based rather than experience-based.

#### *4.4.1 Chemistry meetings*

This theme of findings correspond to the conclusion that de Haan (2012, p.5) arrived as the result of his research:

> *The only form of matching between coach and client for which this research has found any support is subjective matching: where client and coach physically meet each other and have an interview or a trial session, after which the client determines whether to proceed with that coach, on the basis of his or her first impression of the strength of the coaching relationship.*

The participants I interviewed articulated a similar point. For example for Liam it was a big discovery when he realized how much the work with his coach meant to him and how difficult it would be to identify such a coach without making a real contact:

> She understood my personal and professional life and what I'm trying to achieve and my anxieties around that...how can you get that from reading that thing (paper biography)" and "…the thing that matters about a coach are quite nebulous and subjective, and you can't get that unless you meet them I guess. *(*Liam)

> A related point that emerged from the interviews is that for the coachees I interviewed there was recognition that challenge was also an important part of the dynamic that needs to be in the relationship. It appears to be combining care with the capacity to confront the coachee on some aspects of what they are saying. Christine propositioned this "care-frontational" idea when she described how challenge should be part of the relationship, stating that:

> It's not a bag of sweets, it's a relationship with all that comes with it. *(*Christine)

Mark stressed the importance of what he calls a "tester session" (more commonly referred to as chemistry meetings in coaching circles). This would involve doing everything one would do in a normal commercial relationship. In fact everybody had something to say about chemistry meetings, including those who had not had them. All recommended it, even those who had a good fit with their coach still advised others that if they were to do this again they would have chemistry meetings and those that had, would advise having more of them. For example:

> I would have liked to have been introduced to more so like had a third option or a fourth and then been able to make a decision, but time was a bit of an issue for me. (Gary)

Hearing their stories and their articulation of chemistry meetings it can be seen that it is mainly about testing if you could work with that person and getting a feeling for what the relationship and the coaching would be like. For example Amy said:

> …It's purely about chemistry and being mindful what coaching is intended to do. *(*Amy)

Chemistry meetings are also about having alternatives and choice, which might include opposites. For others it is about risk reduction. Some only relied on chemistry meeting, such as Christine, who didn't even read the biographies of the people she was going to meet saying;

> I'm a person so just meet them. *(*Christine)

Christine goes on to give a clear description of what chemistry might be:

> …What matters is how you feel with them and how useful they can be to you.... and discomfort – don't just shut this down it can be a well of development. *(*Christine)

While everybody was recommending chemistry meetings and the value that they bring, Liam, who changed his view from the first interview to the second interview in seeing the value of chemistry meetings (and this is most notable as he did not have any chemistry meetings), does voice a concern about how he might have got on with them all differently. He implied that meeting more coaches might not have made the decision any easier. Being someone who is very pragmatic, by his own admission, he didn't really want to invest that time. So although he does recommend it to others he was not entirely convinced for himself that the extra return on investment of his time would be worth it in terms of a better choice of coach. This is a good question to think about for coachees: what will meeting multiple of alternative coaches bring – will it lead to a better, more rewarding and more productive match, or will it just be a lot of time to confirm something you already knew.

Tony didn't have a chemistry meeting and he still got a "good coach" in his eyes, but he did with hindsight see the benefit in meeting others:

> I didn't, but it was therefore a bit of a gamble, that thankfully worked. *(*Tony)

He can see that chemistry and the connection are critical. However, he was not aware that he was either entitled to a chemistry meeting or that it was a good thing:

> Yes, I would say that have an initial meeting to see whether or not it's the kind of person you really want to trust your problems with. So yes, the initial meeting is, and also I think it should be confirmed that it is an introductory meeting to enable you to decide who your coach will be. That was not made aware to me. *(*Tony)

The coachees that I spoke to clearly articulated the central importance and value that chemistry meetings can bring. There is an interesting parallel though here on how their view on chemistry can change in the same way their view on what matters can change. Equally there were differences in their needs of and the level of awareness of these needs at the chemistry meeting. These findings show that their espoused expectations did not match their consequent realizations. A potential conclusion would be that chemistry meetings should be encouraged more as they can, if managed well, allow that gap between expectation and realization to be made conscious and brought to the surface of their decision-making process.

There also appeared to be a recognition that a process can help, but that one should be open to the fact that there are constraints to the amount and nature of choice that is available.

#### ***4.4.2 The constraint issue***

Mark, who had been through the process of choosing a coach four times, realized that each time there had been a constraint issue about who he was allowed to work with and more generally raised the question of whether one is fishing from a "full" pool of coaches. The reality for nearly everybody is that there is a limited pool of people to choose from, so it is not a totally open process. Therefore, there are already constraints, both on the pool that you can select from and how you chose the selection criteria that matter. Some of this is clearly affected by the coachee's knowledge and access to coaching resources. For example Christine, who was training to be a coach and now deployed coaches for others in her organization, was able to ask a network of people who knew her and knew coaches. Amy, as was shown earlier, clearly trusted the process (even when it produced coaches she was not anticipating). Equally Aarti and Liam were aware of a very rigorous process that the NHS had been through to ensure that only a really strong pool of NHS approved coaches were included in a register for them to choose from.

Mark took a further step back and advised that the first stage of the process would be to treat it like a proper recruitment process, as you would do in a normal selection process. His simple advice was "*Don't just jump in to the first person*". Jane also talks about doing some homework to find a vendor –doing some initial screening around experience, background and portfolio so that choice and a pool of people are offered. She also talks about how experience and trust (the critical need for this) can vary by level of coaching.

Arguably the coachees are articulating their experience of the concepts described by Joyce and Neal (2012) whose model for selecting coaches suggests the importance of Credibility and Capability. Jane also pointed out that those supporting the coachee in the decision-making process might need to help the coachee to think beyond their initial presenting reason and need for coaching as sometimes what people initially present needing help on is not necessarily what they really want.

### **4.5 Individual differences**

Having presented the key themes that emerged from the participants there are also some smaller, but important, strands that emerged from the individual voices of the coachees and the "journey" they went on around choosing the coach. While each of these is unique to the individual, if one wanted to give an umbrella title to them it would be about the insights they gained on how coaching works and how it is working for them. Looking at each participant it is useful to remember what has already been learnt about their experience on choosing a coach and then show what they learnt about how coaching was supporting them.

**Amy** had started with a belief that she needed a male mentor to help her deal with all the difficult "Alpha" males she worked with. However, she was presented with female coaches, who turned out to be much more beneficial for her**.** It was clear that the coaching came at a time when she needed space to not feel alone:

> I'm pleased by how much I've got from it actually, so initially I guess I was thinking it would be just nice to have someone who can sympathize a bit and say you're not mad and actually that's quite you know normal but she's given me more um insightful tools, too. (Amy)

Coaching also enabled her to develop a deeper level of confidence in herself and make her appreciate that she had got it within herself to deal with the day-to-day challenges she was facing:

> The key strand has been my confidence levels and deeper confidence levels, I always feel like I'm having to justify myself and the same with looking fairly young in that role. So that was sort of an area that has always tripped me up a little bit and I feel that with my coaching with Jane. I've got deeper confidence you know like people are entitled to their opinion but I'm not you. (Amy)

It could be argued that Amy's initial request for a male mentor was a reflection of her lack of confidence in who she was as a woman in her role. Accepting a female coach was probably a critical first step to realizing that by being herself and developing confidence in herself as a person she could move forward. That, as can be seen, was a key theme for the coaching for her, developing confidence in her authentic self and that a key to unlocking this was actually getting the "match" right and finding a coach who could be a role model to her and a female role-model.

**Liam**'s choice was initially a very pragmatic and objective decision. He then went on to realize that there could be value in taking a more subjective and thoughtful approach to choosing a coach. He equally learnt the value of *"sitting back and getting perspective"* and how travelling two hours from his home to where the coaching took place was actually part of the whole coaching experience. The whole theme could be connected as recognizing the value of taking time to value reflection, both before and after the sessions and more generally on his actions. As was mentioned earlier he subconsciously had created the coach he needed *"I'm fairly easy going and I'll work with what's there, so this is what we've got, so let's see and make the best of it".* For Liam this meant being in a relationship where he could build the coaching around his needs and that the coach would be flexible in working with him to achieve that unique coaching relationship. One way that this was facilitated for Liam was the way the coach tied together the work and the personal nature of the coaching. In addition he had really appreciated that the sessions had been focused on very practical issues he was facing:

> I think both sessions have helped me quite differently as the first one I came away with some practical ways of thinking about me and my relationships to other people in the organization and some of the things that drive people. And then the second one after that I've taken on the chair of a few groups, and I've never chaired anything in my life and I was quite anxious about that. So a lot of that was about practicalities of how to do it and how to think about it in a way that I just demystified it , and that has been extremely useful as well. *(*Liam)

**Gary** came to appreciate how shared values were as important as credentials – and that the coach helped him step back and look at the behaviours driving those he worked with:

> Things that I discussed at the coaching boiled down to me bringing my values into play and not being able to deal with certain individuals because in my view they went beyond what I deemed to be the right thing. So they broke my set of values in a way and you know the coach helped me get around and that you know, got me to think about things a little bit differently. (Gary)

This learning also linked with his discovery about how he chose his coach. He realized that while he was initially making the decision on an objective sense of goal achievement he realized on reflection that it was also important to him that he could trust, respect and open up to his coach and talk about issues such as values.

**Aarti** learnt how he could appreciate the business psychology therapy angle to coaching and how his coach was very perceptive and observant. Most significant for him was how powerful it was to hear his own voice and to rephrase things. :

> She has been very perceptive, certainly very observant of what I said and the tone I used to say it with and what she thinks I may have meant rather than assuming what I meant. She actually regurgitated what I said and said is this what you meant and funny how when people say what you said it sounds different. Cause it was different in your head but now that you hear it from someone else, oh that's now what I wanted to say it's different. (Aarti)

He concluded that he sees it as "building self without really teaching". Aarti had come into the coaching with very little understanding of coaching and listening to his story and description of how he had received support before, I think he was holding on to a mixture of mentor and teacher as his model of coaching. As can be seen from the quote above he has made a big discovery/switch in only two sessions to see that it is a coach helping him to hear and understand himself that has been most useful for him. In relation to choice he commented on that if he was to go through the process again he would, therefore, pay more attention to these factors:

> Ultimately I think the majority of coaches and those have things in common, most of them might have MBAs, might have taught CEOs or corporations or what have you, but it's that personal touch that you are looking for now in my position, that seems like that would be the differentiating factor. (Aarti)

**Christine** gained confidence through being able to *"fly with your own wings".* Central to that growth in her confidence was the fact that she could open up to her coach in a way that she had not done with anybody else before *"being able to be totally open and open up all my drawers".* At an even deeper level Christine talked about how it had helped her develop as a person and how it allowed her to *"Modulate and moderate my views – simply growing up".* What had been Christine's biggest learning probably was that for her the only way that the coach could have helped her with all of this was by the coach being genuinely interested in her:

> I think what was very key for me here was that that person was also curious to look at me in a human way. In a more tell me more about you and what would you do. Not because it is a set question to get me to do that but because they were generally interested. It was the human aspect of it not just the "I'm here on a mission for 6 months to get you toward that stage" but that she was curious to understand me and here to help me because she cared. (Christine)

Mckee, Tilin and Mason (2009) argue that one of the most powerful aspects of coaching is the attention the coach gives to their client. It is rare that someone listens as attentively, supportively and actively as a coach. This is what I believe Christine was most appreciating and the importance of this person interest links very clearly to how Christine approached choosing a coach, which was to want to meet a selection of a coaches but explicitly not wanting to know anything about them so that she could simply get to know them through her own curiosity in them and how the meeting developed.

**Tony** appreciated how his coach asked questions to enable him to find the solutions and how his coach questioned his current thinking on issues and his beliefs and views in a very safe manner:

> It's challenging because he doesn't really give you an answer, he questions your belief your views, in a very safe manner I suppose. I say safe because that was established from very early on and every time we meet it's about, you know, seeing how far we've gone in my fears in my anxieties or things that were bothering me. Then I think he says another thing, why don't you try this or try that and I go away and come back you know having tried it and it works. So it's really quite good (Tony)

A core theme that has emerged from hearing Tony's story is that of confidentiality and safety. This theme spans both his discovery of what has been important in how the coaching has helped him and also in how Tony made his choice about which coach to work with. Issues of confidentiality and safety to discuss issues are in both examples.

**Mark** had the added complexity, and benefit, of using the coach to work with the team as well as himself which meant that he also had to manage the "match" and choice that the team made, and needed to make. Arguably each time Mark worked with a coach he expanded his understanding of what he needed from his coach and also gained more insights into the type of coach that he best connected with. Interestingly he was left believing that he might benefit from using two of the coaches that he worked with:

> Michelle's approach is kind of a personal thing and reflects on how you interact with people. I think she perhaps brings the bit that I lack a little bit more, she's the bubbly person you know she's probably much more of a non-passive extrovert. I think with Chris he brings much more of the theoretical the empirically based thing, so he probably talked much more my language if you like and we can have more of an intellectual conversation about the approach to things rather than, which isn't to say they don't cross over at all, but just in terms of where their strengths are. I'm actually thinking I could stick with both of them and I can get different things from each of them. (Mark)

In the world of sports coaching the concept of having more than one coach is common. Recently Frank Dick (2010) who has operated both as a sports coach and executive coach has been promoting the idea of a meta-coach, or mediator coach who coordinates the variety of needs of the coachee with coaches who are best placed to support these needs. This might prove an interesting route for future research, how working with more than one coach can work and how choice and matching fits in relation to this. Who you need at what time from a team of coaches could vary with time and need, but the meta or mediator coach could act as the bridge between the changing evolving needs.

**Jane** gained deeper insight (she already had a lot of insight) into how she made decisions about people and relationships and how she kept on coming back to the concept of "respect". When she describes how the coach had helped the key theme appears to be about the "clarity" it gives her to move herself forward. For Jane she noticed over time that the central strand of support she gets' from working with a coach is around clarity of vision:

> He just enabled this clarity so that I could make some decisions around the different scenarios and situations that we talked about. I think there is a tendency sometimes from me to perhaps bring, reflect when I am talking and the issue that I may have come with could have developed into a number of issues. So I think for that situation and many situations he enabled that clarity for me. He didn't solve the issues or enabled a path or pathways, just enabled that clarity of vision that I needed (Jane)

Coaching is sometimes described as a "personalized development service" and this personalized element can be seen in these short summaries of insights. It is important to recognize that beneath the common themes and the themes of findings that I interpreted from my interviews, each person gained something unique and personal to them and each person experienced coaching and their coach in their own unique way. Kram (1985), although describing mentoring, made the transferable point that:

> Any two individuals involved in a relationship bring a unique set of needs and concerns that are shaped by their respective life histories (p.235)

What is noticeable as I listened to and reviewed the insights and stories from the coachees is that there appeared to be a connection with how they made choices about their coach. Patterns can be seen to be being replicated in both how they chose a coach and what they are getting value from in their coach. How they made their choice about their coach, links to issues that emerge from how coaching has helped them. From a psychological level it appears that their dominant needs (which are what they have noticed from how their coach is helping them are subconsciously imbued in how they made their decision about their coach and coaching. The decision-making process, although often "distracted" by this confusion of mentoring versus coaching, seemed to be affected by the underlying issues that coaching was going to help them with. For example Tony who described how confidentiality was part of his choice criteria and then this emerged as a key part of his coaching. Christine had been curious to know the coach and eager for the coach to be curious about her and being curious about people was a theme for her coaching. Jane talked about decision making being her central coaching issue and being the aspect of the coach match that she reflected on the most.

What would be interesting to know is whether in reflecting on the choice and decision-making process of selecting their coach, a coachee can get some insights, therefore, into where there critical coaching needs might lie.

**4.6 Summary**

In summary the journey that people go on when embarking on a coaching relationship is fascinating and what has been presented above shows that their needs and experiences are not static. In the space of a few months, and with relatively little exposure to coaching people's perspective shifted dramatically. Perhaps the two main observations are as follows.

Firstly prior to starting coaching a number of potential coachees may well be holding a mentoring process and a mentor image in their mind rather than a coaching or coach image. This leads to a set of expectations and desires of their coaches that are more about mentor qualities than coach qualities. However, once in a coaching relationship they quickly shift to a much higher appreciation and valuing of the relationship aspect and the "common factors" that Wampold (2001) have shown to be consistently critical in other dyadic helping relationships.

Secondly, when reflecting on their experience the coachees I interviewed gave strong support for chemistry meetings, or taster sessions to allow the coachee to really reflect on how different coaches can create different conditions for the relationship as well as being there to support them in working differently with their specific needs. This meeting, where two people meet to see if they can have a productive working relationship, as well as checking that the competence and needs are aligned, is viewed by my participants as likely to lead to a better "match" and hence a higher impact on an effective coaching outcome.

Having presented the data and a perspective on what is emerging from the data in the next chapter I will comment on the significance of the findings in relation to theoretical contribution to those involved in coaching and coaching related research as well as making recommendations for future research.

## CHAPTER 5 - DISCUSSION and CONCLUSION

**Marcel Proust** *"The real voyage of discovery consists not in seeing new landscapes, but in having new eyes"*

In this chapter I first discuss the findings presented in the previous chapter in light of the relevant literature and implications of these findings together with the potential contribution to knowledge. Practical recommendations are explored from multiple stakeholder perspectives including the coach, the coachee and the purchaser of coaching services. After this I comments on the limitations and learnings from a researcher perspective and finally make suggestions for future research.

In summary the key gaps in knowledge that the research was looking to explore were:

- The lack of insight into the psychological factors involved in the matching and choice of coaches from the perspective of coachees.
- The lack of understanding of the lived experiences of coachees in order to help coachees make more informed choices/decisions about coaches.
- The lack of insight into the complex relationship between first impressions and longer-term relationship needs.

In order to address these gaps my intention was to:

- Provide a comprehensive review of narratives, which will help coaching organizations, and those responsible for setting up coaching and mentoring relationships make better-informed (effective) matching decisions. This should also help potential coachees to be aware of the difficulties and pitfalls of their decision-making process and consequently make more informed and potentially better decisions about which coach to work with.
- Contribute to professional discourse and debate on the role and quality of choice in coaching relationships and to generate further ideas for future research.

### 5.1 Findings

The following is the discussion of the findings in light of the literature and in the order of importance.

#### *5.1.1 The shift in expectations: from "Mentor" to "Coach"*

Prior to starting coaching, coachees appeared to be holding a mentoring and mentor image in their mind rather than a coaching or coach image. This led to a set of expectations and desires of their coaches, which are more mentor qualities than coach qualities. These qualities are associated with the experience that the coach/mentor has of their industry or sector, their level of knowledge in their subject area and their ability to give insights and recommendations of what to do. This is in line with findings of research that indicates that credibility of the mentor is an enhancing factor that attracts a protégé to potential mentors (Kanter, 1977; Olian, Carrol and Giannantonio, 1993; McCroskey, Hamilton, and Weiner, 1974; Kram, 1985; Cox, 2005). However a number of studies on coaching show that coaches tend to appreciate and value the relationship aspect (Stober and Grant 2006; O'Broin and Palmer, 2007; de Haan et al, 2010; Critchley, 2012) supporting the idea of "common factors" that Wampold (2001) have shown to be consistently important in other dyadic helping relationships. These qualities are arguably more highly valued in the recognized definition or understanding of coaching and how a coach works rather than a mentor or mentoring. That is not to say that these common factors are not important in mentoring. However, in mentoring they are strongly associated with experience and wisdom in the mentees' subject area, industry and often organization itself, which are, in the "strictest" definition of coaching, not important or required for being an effective coach (Cox, 2005; Grant, 2005).

This finding seems to contradict the conceptualisation of some authors of the differences between coaching and mentoring in terms of the expectations of the clients. Cox (2005) for example, pointed out that in mentoring the inspirational and role model elements should be natural and acceptable, whereas in coaching these factors are arguably less critical. Yet in listening to the voices of participants in this research it was clear that this inspiring role model together with experience and knowledge was what they were looking for when they first approach coaching. It is possible therefore that they were not differentiating between coaching and mentoring in their expectations.

A potential interpretation of the change in the expectations by the participants is that if people cannot differentiate mentoring and coaching then when using term coaching they actually think of (the more historically recognized word) mentoring. There are some implications that follows from this: how to help coachees increase their understanding of coaching and how to show them that their understanding (or lack of) might be impacting on their expectations about a coach and how they decide on a coach to work with. As Meyler (2008, p.4) points out "the relationship between two people is unique. So the contracted relationship will change according to the desires, needs, capabilities, knowledge, and beliefs etc. of each person." However, this relationship will be influenced by who you are introduced to as your coach, and this in turn will be affected by what you ask for in your coach, which in turn will be influenced by the internal definition that the coachee has of coaching.

It could be argued that the issue of terminology is not an issue of coaches alone. There are continuous debates in the coaching literature about definitions of coaching and clear boundaries of this term with other helping practices. A variety of “niche types” of coaching keep appearing, for example, life coaching, health coaching etc (Grant and Kemp, 2005). Equally there is an argument that some practitioners take advantage of a popular new term and apply it to their general services (Clutterbuck, 2011). Consequently, coaching has suffered from a degree of misperception and misrepresentation (Kaufmann, 2008). The use of these terms interchangeably often perpetuates this confusion, so that one person’s coaching is another’s developmental mentoring (Grant, 2010). Many organizations use the terms to mean specific things in their own organizational contexts and others choose the terminology that seems most acceptable within their organization (Clutterbuck, 2011). These problems around terminology are also illustrated in the CIPD 2004 training and development survey results, where 81% of respondents agreed that “there is a great deal of confusion around what is meant by the term “coaching”. While this debate continues, more and more terms emerge and there seem to be almost as many definitions of coaching as there are practitioners. Further, the words are interpreted differently in Europe and the US, which can only add to the confusion (Rosinki, 2010). What this research has highlighted is this confusion of the term is very real and seems to have an impact on what the coachee is looking for in the coach.

This in itself is important point to keep in mind because it might change how one helps or works with coachees in understanding how the coaching is going to support them and how that might determine what they look for in the coach. The impact of this misunderstanding could mean that the choices, decisions and potentially the ultimate match has led to those who have higher mentoring credentials and capabilities being selected more often than those who come from more of a coaching background. Coachees may well receive coaching from the person that they select and it may be that they still form an appropriate and a strong match. Or they may receive mentoring and while this mentoring approach will bring some value to the coachee it may be that this misperception of the coach they need and this different expectation of coaching might cause them to choose a coach who is not best able to help them with their underlying need.

In more simple terms, coachees may receive a mentoring service when they and others believed that they needed a coaching service. Or they receive a good coaching service when they could have had a fantastic coaching service. The key issue is that they are not necessarily giving themselves the best chance to get the right coach for them. As they are limiting or misrepresenting their need for a coach by using mentor or mentoring language they might be introduced to coaches with a profile strong on those qualities. This may exclude them from being connected to coaches who may well be better matched on the real or underlying factors that will be most important to them in the coaching and most important to them in creating a positive coaching relationship. However, there are authors who propose that a good coach can adapt to the needs of their coachee – even if the presenting issue is more of a mentoring than a coaching need (Cox, 2005; Clutterbuck and Megginson 2010: 7). This may be worth exploring in future research, whether coaches can truly adapt to the need of their coachee or whether there are limitations (and what these might be) in their ability/capacity to adapt.

While on one level it might seem to be pedantic to be debating the subtle difference between definitions of coaching (and mentoring) it can be argued that this simple and subtle difference can have a profound impact on the coaches that the coachee is introduced to and the coaching that they might receive. According to Wittgenstein (1922) "The limits of my language mean the limits of my world". The limits of the coachee's language for coaching may limit the coaches they meet. Therefore, more time and energy should be placed in helping the coachee think through the definition of coaching they are holding in mind and the impact it has on their request for coaches and coaching.

If this impact is as such then the misunderstanding around language and assumptions about the interchangeability terms such as mentoring and coaching could well deserve attention in future research. Both Cox (2005) and Grant (2005) discussed the key differences between coaching and mentoring in the way accessible to the average coachee, but findings of this research indicate that there is a need to make this knowledge and perspective more accessible and more helpful to coachees at the point of making matching decisions. If people are mixing up the terms mentoring and coaching maybe other stakeholders involved in coaching, such as coaches, buyers of coaches and coaching services and those who facilitate the matching of coach to coachee could pay more attention to the difference between the two approaches. It might help to be clear about the true needs of the coachee and then ensure that the match and the choice are responding to the need. As Whybrow and Henderson (2007) point out the varied impact of coaching may be because of any number of factors such as the differences in the coaches' skills and abilities, how effectively coaching is integrated with other interventions, how coaching is practised in the organization or the degree of match between the coach and coachee (Hale, 2000; Cox, 2005).

One approach might be to provide support or education' of the coachees on what they should really expect and what a good match is about. Overall, the key "user" of coaching appears to be holding a misaligned view on the service.

### *5.1.2 **The evolving relationship***

In addition to the potential misunderstanding and "misarticulation" of what the coachee is looking for in their coach, is the coachees' realization, when they start receiving coaching, of the crucial importance of the relational aspects of the coaching. A growing body of literature suggests a critical role of the coaching relationship for coaching success (e.g. Baron and Morin, 2009; Bluckert, 2005; De Haan, 2008; De Haan et al., 2012; O'Broin and Palmer, 2006, 2009, 2010) and the findings of this study seem aligned with this. Thus, how coaches can influence the development of the relationship to their client and what aspects constitute a high quality coaching relationship from the client's perspective are important questions (De Haan, 2008; O'Broin and Palmer, 2010).

Similarly to Carruthers' (1993) trajectory or phases of the mentoring relationship it was clear for participants in this study that after only one or two sessions the relationship developed significantly. Accordingly the coachee's understanding of how coaching can help them has also changed. Dolinsky et al (1998) investigating the matching of therapist and patient suggested that previous studies have focused exclusively on match as it relates to the initial process of choosing a therapist, rather than examining the evolution of the match longitudinally. The findings presented here indicate that this evolution can occur quite quickly. As Ianiro, Schermullz and Kauffeld (2013, p.39) point out "because relationship quality can be operationalised as both a process and outcome variable, future studies should also assess this variable over the course of the whole coaching process, i.e. all coaching sessions."

Against this backdrop it is worth reflecting on the fact that decisions around matching and choosing who to work with are made at a very early point in the relationship and therefore coachees may overly focus on that phase of the relationship rather than what might be important later in the relationship. It seems that coachees have little understanding about what might be important at future phases of a relationship. A fair question in this case is that if coachees were more aware of this would they make different choices about the coach with whom they wanted to work. This research, has arguably supports Carruthers's findings in this area, and indicates that in just one or two sessions a coachee gets key insights into both the coaching process and how a coach can help them, which are different to their expectation when they were choosing a coach. If potential coachees had access to this appreciation of how their perspective might change this could lead to them think differently about what they are looking for in their coach.

This research also generally supports Blackman's (2007) finding that what matters in the coaching will be different at different points in the process and that when the issue of what is important is probed beyond surface level questioning, the relationship and match in interpersonal terms become more prominent. What was significant in this research was that this change was quick and often quite dramatic. It is also important that this happened for all eight participants. While each person took something unique and different from the coaching, the consistent element was the importance of the relationship and the core conditions as previously discovered in coaching and other dyadic helping relationships (Dolinsky, 1998; Wampold, 2001:Hodgetts, 2002; Boyce and Hernez-Broome 2010).

Boyce, Jackson and Neal (2009) argued that a coaching relationship with strong rapport between the coachee and the coach is expected to increase satisfaction with the coach and the programme. This is not a new phenomenon (Bluckert, 2006) and so called "rapport behaviours", as demonstrated in clinical and mentoring literature, are associated with retention, higher levels of self-disclosure, compliance, satisfaction, and effective treatment outcomes (Duggan and Parrott, 2006; Heintzman, Leathers and Parott, 1993; Joseph, Griffin and Hall, 2001; Leach, 2005). Research by Gyllensten and Palmer (2007) also suggests an important role of rapport in executive coaching relationships. However findings of this study indicate that coachees are not aware of (and are seemingly not encouraged) to place importance on this rapport at the point of deciding on the coach with whom they wish to work. For example Atkinson (2005) and Gray (2010) warned there is a danger in ill-informed or misleading matching decisions based on factors such as the initial rapport between executive and coach. This research indicates that it might be possible to help coachees tune into these factors.

There are a number of potential implications of this finding both for theory building in the field and implications for practice. Firstly it supports previous research indicating that coaches need to focus more on the importance of the relational dimension of the coaching. It might be even more important than tools and techniques for the coaches to facilitate a more effective and more rapid establishment of those core common relational factors. Critchley (2012), who has written extensively about the importance of the relational perspective, believes that this perspective has "important implications for the contracting and evaluation of coaching assignments, for the competence coaches need to acquire, and for the development of coaching practice" (p.30).

Secondly as the coaching relationship represents a complex, unique and critical interpersonal factor, then simply focusing on a binary or mechanical approach (looking purely at matching on aspects such as gender, industry experience, location, level of experience in organization) to matching is too narrow and simplistic against that understanding. While not said explicitly it could be speculated that if participants in this research were more aware of this complexity of the coaching relationship and the value of listening to their personal feelings and reactions to their coach, they might have felt more comfortable to articulate and request different coaches and a different approach to choosing their coaching.

It can be argued that the power dynamic is often such in coaching that the coachee feels grateful for the support and not encouraged or empowered to question and make demands or requests about their coach and the coach relationship. This can be particularly true if the coach has been personally recommended by someone more senior to the coachee, or equally someone that the coachee respects. This has the potential to lead the coachee to feel inclined to follow the recommendation. When this is combined with the lack of knowledge that most coachees have into coaching and what to expect it can further strengthen the power position that the coach has and to weaken the coachee's capacity to challenge the "match". What can happen is that this "weak" position can lead the coachee to neglecting their feelings and subjective reactions and more likely to rely on the hard factual criteria which are less likely to be disputed or challenged. This research indicates that coachees should be more strongly encouraged to take more "power" and confidence in all aspects of their feelings and reactions to the match and use all available data to make their decision.

In terms of the debate on the role of subjectivity in making the choice of the coach De Haan and Duckworth (2011) investigated the critical points in the coaching relationship and concluded that:

> We are now in a situation where we have strong indicators for the importance of certain common factors in executive coaching, in particular the coaching relationship as seen by the client, whilst the importance of objective matching between two personalities as it is usually done might be overstated. (P 13)

Similarly, the form of matching between coach and client that this research supports was subjective matching, where client and coach physically meet each other, have an interview or a trial session, after which the client determines whether to proceed with that coach, on the basis of his or her first impression of the potential strength of the coaching relationship.

Research into "the" therapeutic relationship shows that there is no one thing called "*the* helping relationship" as it is perceived and evaluated independently by clients, therapists and observers (e.g., Horvath and Marx, 1990; Horvath and Symonds, 1991). Strong relationships are more likely to lead to coaching success than clever interventions or focusing on technical competence and face validity of the coach. Some have positioned this as talking about a distinction between coaching as a relationship rather than coaching as an activity, a distinction that has been highlighted in the mentoring literature (Collin 1988; Bloch, 1993). One perspective emerging is that the relationship factors mediate the influence of the client-coach match conditions (commonality, compatibility and credibility as Joyce and Neal (2011) describe them). This research has shown that commonality, compatibility and credibility are important and that these factors will be very much front of mind in the initial stage of the match for the coachee, but that the issues of touch, trust and confidentiality emerged as critical factors in the working relationship over time.

This research indicates that in reality although while the relationship maybe more critical and important in the medium to long term for the future success of the coach, the matching decision and the choice of which coach to work with has been made more on a client-coach match around short term factual based criteria such as education, experience and gender (Boyce and Hernez-Broome,, 2010). Maybe what should be ultimately aimed for in matching is to work more explicitly with a wider range of factors and encourage, empower and educate the coachee to ensure that there is a good balance between these factors. Also where there is conflicting information, the coachee is encouraged and supported to work through what this could mean for which coach they "should" work with.

This research provides argument for a view that more should be done to encourage subjective matching decisions, allowing the personal and subjective to emerge and tuning into the relationship – combined with the more "typical" focus on a straightforward factual rational decision. As well as encouraging attention to both objective and subjective criteria, more should be done to equalize the power of the coachee by giving more encouragement to give feedback about their feelings or concerns. It was not always clear if participants in this research felt empowered enough to enquire about what they should expect from the matching choice process and how important it is to ensure that they are as happy as possible before they start the work together.

Gray (2010) pointed out that one of the problems in matching is that in order to be effective, both mentoring and coaching have to be intimate relationships that are characterized by mutual closeness, affection and trust (Lobel et al., 1994). Wycherley and Cox (2008) though suggest that one should look at the issue more objectively: "Our tentative conclusions are that there are benefits from focusing on the objective selection of coaches using robust standards and criteria, rather than relying on surface or deep diversity factors or subjective matching approaches based on initial rapport." (p. 49). The findings of this study strongly challenge this position and support more the view proposed by de Haan and Sills (2010) that one should encourage the subjective to take more weight in the personal decision making of the coachee. The idea of organizations selecting a pool of coaches based on robust standards and criteria does make sense, but once that pool has been selected the coachee should be encouraged to pay attention to both the objective or rational criteria they put forward as well as the subjective "feeling" of trust, rapport and touch. Interestingly the balance of which carries more weight might be different between a coaching match and a mentoring match, and Gray (2010) suggested that there are differences in the selection process in mentoring and coaching. Arguably some of the rational criteria of experience and knowledge will be more relevant to a mentoring relationship than to a coaching relationship. It is possible that objectivity could take more prevalence in matching in mentoring and personal subjectivity - in matching in coaching.

### *5.1.3 Is there a real choice?*

Another insight that emerged from the study was the degree of "choice" that was actually available to coachees. Personal networks and company constraints or company pools can have an impact on where the coachee can make a selection from as has been acknowledged by Wasylyshyn (2003). This in itself contains or constrains the degree of matching, if for example the organization does not have a sufficient pool of coaches or any coaches in their pool who meet the needs and requirements of the coachee. There is the option that the coachee has to accept the best fit from a limited pool. Coachees also may make a choice based on what they believe to be rational criteria (I want a man as they know the characters I am facing) whereas in fact they may be influenced by the unconscious desire to find a coach who will not take them too far out of their comfort zone. What Amy powerfully illustrated was that sometimes coachees are best presented with almost the opposite type of coach (gender, experience, style etc.) to the one they requested. Far more often the coaching or coach that they most need is not going to be the one that they articulated. They may potentially unconsciously prefer someone who might collude in avoiding some of the most difficult issues.

It is interesting to reflect more generally on how subjective decision making and choice is. Spinneli (2006) proposes that choice arises only within a situated interrelational context, and that choices cannot be at the stimulus or event-level (for examples choices about what occurs and when it will occur) but rather at the interpretative level (how we respond to events, what meanings we bestow upon them). Our choices reflect how we engage with the contextual situation in which we find ourselves (Cohn, 1997; May 1981). According to Spinneli (2006) "the significance and meaning I give to these stimuli, the interpretation I might make of any given event, the attitude I take toward it, the values which I invest in it, the impact upon my life that I declare it to have, ultimately, the way I am in relation with the event, is a matter of my choice" (p.46). Therefore the choice and decision-making each person makes in relation to coaching and matching is one that takes place in their own unique worldview and arguably should be investigated as such.

This links to another complicating factor in what coachees think they want may not be what they are actually looking for. They may, for example seek help in developing particular skills while inwardly troubled with doubts about the direction their career is taking. Do they then select a coach who "hears" the underlying issue, or one who joins them in addressing the stated goal? An implication here then is that the potential coachee may not be helped in explicitly thinking about these issues and how it can impact on who and what they ask for and whom they meet. The contribution to knowledge is to highlight that the focus on what is really important for the coachee may not be getting sufficient attention at this point in the relationship, with more attention being paid to surface needs around experience and knowledge.

One of the most critical ways to ensuring that the match is "right" and that the relationship is going to meet the needs of the coachee is through the use of chemistry meetings. As can be seen from my research the value of the chemistry meeting appears critical in facilitating this process. However, up until now while some authors have written and advised on how to use and evaluate chemistry meetings (Taylor, 2006) it appears that more could be said and researched about how to support the decision-making process of the coachee, particularly at this critical and complex phase of the chemistry meeting. The contribution of this research to this critical element of setting up coaching relationships is therefore discussed below.

### *5.1.4 The importance of encouraging to take part in chemistry meetings*

When reflecting on their experience the coachees gave strong support for chemistry meetings, or taster sessions to allow them to really reflect on how different coaches can create different conditions for the relationship as well as being able to support them differently. This meeting, where two people meet to see if they can have a productive working relationship, as well as checking that the competence of the coach and needs of the client are aligned, is viewed by participants in this research as likely to lead to a better "match".

Chemistry meetings are something that coaches struggle with as well. According to Whittington (2007, p.2) "In many conversations with other coaches and my own experience it seems clear that creating good chemistry is something to do with a particular way of thinking about a relationship - with yourself and the potential client in front of you." At the beginning of the coaching process, coaches usually try to establish a pleasant setting and a good atmosphere. A good connection to the client in the first session is crucial, as it may determine the client's return. Furthermore, it provides the basis of the developing coaching relationship (De Haan, 2008). An affective bond with a strong focus on goals and solutions (e.g. McKenna and Davis, 2009) characterises the coaching relationship. High quality relationships are strongly associated with constructs like trust (Alvey and Barcley, 2007; O'Broin and Palmer, 2010), openness of the coach and the client and mutual sympathy (Jansen, Ma¨thner, and Bachmann, 2003).

A number of authors (Hodgetts, 2002; Gray, 2008; Lane, 2009), have discussed for some time the importance of chemistry meetings. However, the experience from the participants in this research shows that this was not always offered, and if it was offered it wasn't clear whether the meetings were simply confirmatory or real opportunities to decide, from the coachee perspective, if the coach and coachee should work together. Interestingly, those interviewed who had deliberately not chosen to have chemistry meetings, such as Liam, clearly recommend that others should have chemistry meeting because the subjective element is so critical in the "match" and the only way one can truly determine this is to meet the potential coach in person, or at least over the phone. Those such as Gary and Mark who had entered into chemistry meetings were clearly recommending that having more than two coaches to meet would have been even more effective to them.

While the coaching literature strongly recommends chemistry meetings and even goes into some detail about how to set one up and evaluate them (e.g. NHS London website on Leadership Coaching Process or Whittington, 2011), this is not what is being actively encouraged or "enforced" for the research participants. This could partly be a legacy of the power and knowledge difference between the coach and coachee, where the knowledge rests much more with the coach. The coachee may be made to feel grateful for the coaching and those they have been introduced to, so they do not feel confident enough to insist on chemistry meetings or on having more chemistry meetings. The coach may not, for commercial and practical reasons, want to always encourage chemistry meetings.

Holland and Humphry (2006) state that much of the work in coaching is grounded in the relationship; therefore it is difficult to develop a quantitative process that could guarantee success in evaluating the effectiveness of the relationship. If, as has been shown, the literature points to the crucial importance of the relationship, then only the coachee can truly judge this from their perspective and only the coach from their perspective. Ianiro et al (2013) point out that as a good connection to the client in the first session is crucial, the chemistry meeting could therefore be seen as the only “true” means to judge this fit at the start. As mentioned in the Literature Review though, there is still a need to be clear about what a “chemistry meeting” is really about, how it can be best set up and promoted to the coachee and what good “chemistry” can look like (Hodgetts, 2002, De Haan, 2008). An effective bond with a strong focus on goals and solutions (e.g. McKenna and Davis, 2009) characterises the coaching relationship. Researchers have previously looked at where certain kinds of coach behaviour are generally considered beneficial to high relationship quality, e.g. active listening, demonstrating empathy or encouragement (e.g. De Haan et al, 2009; Gregory and Levy, 2011: Maching, 2010; O’Broin and Palmer, 2010: Passmore and Gibbes, 2007). However none of this research has focused on specifically on the chemistry meetings and this may well be a useful avenue for future research to investigate from a coach and coachee perspective how to determine when the chemistry is right and how to best “set up” and “run” chemistry meetings.

The findings seem to indicate that more needs to be done to promote and encourage the critical role that chemistry meetings can provide in ensuring the “right” or “best possible” match to occur. Also as we saw there is a lack of an a priori definition of what match is. How does one define a good match, and at what point is that definition of a good match being made - at the start of the work, during the work, or at the end? Arguably, it should include all points of reference and as this research has shown that such definition, which is probably specific to each person, does appear to change over time. There is a growing body of literature looking at what can constitute the creation of a good bond between coach and coachee, e.g. active listening, demonstrating empathy or encouragement (e.g. De Haan et al, 2009; Gregory and levy, 2011; Machin 2010; O’Broin and Palmer, 2010; Passmore and Gibbes, 2007). However, not much of that research looked at the peculiarities and particular ways this is transmitted in the chemistry meeting and how that evolves over a coaching relationship.

Having reflected on the key points of discussion from my analysis it is now worth examining the limitations to the research before summarizing the key contributions and learnings.

**5.2 Limitations of this study**

All forms of research suffer from conceptual and practical limitations. Having followed Hycner’s approach to the data analysis I used his headings for the general limitations of IPA when looking at potential limitations of my study.

#### *5.2.1 Randomness*

*A* frequent criticism from experimentally oriented researchers is that unlike experimental research, the "sample" is often not random (though with certain phenomena it could be random). Very often it is necessary for a phenomenological researcher utilizing the interview method discussed here, to seek out participants who not only have had the particular experience being investigated but also are able to articulate their experience. It should be remembered that the phenomenological researcher is seeking to illuminate human phenomena and not, in the strictest sense to generalize the findings. Therefore randomness, or participants unable to articulate the experience, *might,* in fact, keep the researcher from fully investigating the phenomenon in the depth necessary. I am confident that the participants, who I engaged with, while not random, because I took a purposive approach to sampling, were varied enough and at the same time experienced the phenomena under investigation.

#### *5.2.2 Limited number of participants*

Doing this kind of phenomenological research for the most part requires that only a limited number of people be interviewed given the vast amount of data that emerges from each interview. The focus is of course on the richness of data rather than quantitative reduction.

#### *5.2.3 Generalisability*

Another common criticism from experimentally oriented researchers is that as a consequence of the absence of randomness and the limited number of participants, the results of the research cannot be generalized and therefore are useless. In the strictest empirical sense, the first part of the criticism is accurate in that the "results" only apply strictly to the participants interviewed. However my ambition was simply to illuminate to some significant degree, the "worlds “of the participants in relation to the focus of this study that in itself is valuable. However, in-depth investigation of the experience of even one unique individual can reveal the phenomenology of human beings in general. IPA is committed to the painstaking analysis of cases rather than jumping to generalisations. This is described as an idiographic mode of inquiry as opposed to the nomothetic approach (Smith et al 1995). It is also possible to think in terms of theoretical rather than empirical generalisability. In this case the readers make links between the findings of an IPA study, their own personal and professional experience, and the claims in the extant literature (Smith and Osborn 2007)

Although the results of this study may not be generalisable, they are phenomenologically informative and provide a rich description of the phenomena that could not be gathered by other means. I also believe that the findings are transferable as they can help those who are involved in coach matching to think more broadly about matching criteria from the unique and individually informed angle.

### *5.2.4 Accuracy of descriptions*

*A* number of issues can be raised as criticisms of the "accuracy" of the descriptions given by the participants.

(a) *Retrospective viewpoint, and the difficulty of verbalizing essentially non-verbal experiences.* One of the first criticisms often raised is that interviewing a participant about a phenomenon elicits a retrospective viewpoint. The criticism is that a retrospective viewpoint is not the same as getting a description from someone while an experience is actually occurring. It is argued that a retrospective viewpoint is altered by time and therefore different from the experience itself. Hycner (1985) argues that *any* description of an experience is already different from the experience itself. Language, by its nature can enhance or distil an experience. The best we can do through the medium of language is to be one step removed from the original experience. Consequently, a retrospective viewpoint has some *of* the same shortcomings as even a concurrent description, given the nature of language.

On top of that, a retrospective viewpoint especially has to be cognizant of the passage of time. That is, the participant is describing an experience after some time has elapsed. The disadvantage might be that the verbal description is not "accurate" because of distortions arising from the passage of time. The advantage is that a retrospective viewpoint may actually allow a much fuller verbal description because the participant has had an opportunity to reflect back on the experience and to integrate it consciously and verbally. One of the things that was difficult in my research is that the degree of retrospection is quite wide, with some I interviewed talking to me only days after the event and others talking months after the event. While I expect that this changes their view and maybe impacts on the language and insights they are able to articulate I still feel the insights shared were valuable and not overly distorted by the retrospection and in fact at times enhanced by it. Reflecting back on my initial intentions I can see one potential key area of limitation, namely that I did not speak to coachees right at the point of contemplating coaching or engaging with a coach. In some cases I was speaking to them weeks even months after that point in time. This highlights a potentially rich avenue for further research to replicate my methodology but adding the element of interviewing people at that first point of considering a coach.

(b) *Confabulation and psychological defensiveness.* Another issue that is often raised, and is related to the above issue of the retrospective viewpoint is that of confabulation. Confabulation implies that a participant fills in gaps in memory according to his/her later subjective viewpoint, or in a manner that s/he believes would please the interviewer. It is usually assumed that this is done unconsciously. It is true that this is always a danger. However I worked hard to convey that I did not want any specific answer. However, one related observation I made was that the question that people seemed initially difficult to acknowledge was “what you would do differently?”. Most people wanted to defend the approach they had taken. Even if they recommended a different approach they still felt they had found the best coach available to them. Whilst this indicates a positive working relationship, the question arises of (a) whether they were defensive about their choices and/or (b) they thought they were getting a good service while they had never had that service before. This can be seen as a potential limitation to my research but equally one can argue that it is exactly this population with this possibly naive perspective, with all of its limitations that I wanted to hear from.

#### *5.2.5 Subjective influence of researcher*

Perhaps the most common criticism is that the subjective influence of the researcher, in both the interviewing and analysis phases negates any possibility of the researcher coming up with objective and therefore usable data. Given the approach of phenomenological research, there is no way to eliminate the "subjectivity" of research. In fact, the phenomenologists believe (Hycner, 1985) that it is the very nature of such "subjectivity" which allows for greater "objectivity," that is, an approach that is most comprehensive and faithful to the phenomenon. Listening back to the interviews it appears that I may have potentially led some interviews and did not probe others enough. While it is fairly standard practice when conducting phenomenological research to use semi-structured interviews I can see that my interview structure at times was too rigid or static. As I listened back to the interviews, I wondered that if I had let the conversation ebb and flow more around the issues as they emerged from the participants, I might have got even more natural and deeper insights. Recognizing the inherent researcher bias to the data analysis and that I was always in danger of projecting my meaning onto the text it is important to accept that a person who is trying to understand a text is always projecting. It is also true that the very language I used in my questions may well have impacted on the issues that the participants shared and I may have introduced concepts such as chemistry, trust and rapport that may not have been words they would have used to describe their inner worlds around coaching.

Having spent time immersed in my data it is increasingly clear to me that the phenomenological view of experience is inherently complex and experience is understood to be *in-relation-to* phenomenon, it is not really a *property* of the individual per se. Even though I knew I needed to stay true to the voice of my participants and the intricate and often unrelated messages they were conveying to me, at times I got drawn into looking for conclusions and seeing patterns before they potentially emerged. At these points I needed to catch myself in this act and remind myself that phenomenology is a live dynamic activity, not just a scholarly collection of ideas, that experience is tantalizing and elusive and that my job was to work with the notion of appearing rather than analysing. As Gendlin said "What appears is neither internal nor external, neither just private nor just interactional. My situation is not just "subjective", since the others in it are more than I can experience, but neither is it "objective" since my situation does not exist apart from me" ( 2004, pp. 147-8).

My aim was to understand, to stand alongside and to seek understanding through immersion in another's world. I also tried to maintain a constantly questioning attitude in the search for misunderstandings, incomplete understandings, deeper understandings, but as had been outlined above this is not possible in a purist sense and the findings chapter is therefore, clearly an interpretation of how synchronized I am with what the participant is saying.

The major risk of unreliability and invalidity resides in the interpretative process for, as Kvale, (1983) notes, the researcher can "read the data as the devil reads the bible". We must remember that there is no absolute interpretation of the data and that interpretations can produce contradictory as well as coherent meanings. The best the researcher can do is to argue a particular interpretation as persuasively as possible, supported by references to the data, and leave the final judgement to the reader (Osbourne 1990). Phenomenological research focuses upon meaning rather than facts. Stable meaning can transcend variable facts. Such reflected subjectivity may be superior to technical objectivity (Kvale, 1983)

### *5.2.6 Application of different coaching approaches, cultural Variations and generational factors*

In this case the focus of my research was not looking to look at a number of variables that have been argued to have an impact on coaching outcome. For example it is clear that there are a myriad of coaching approaches (Jarvis, 2008) and that these approaches can show different aspects of starting coaching relationships (Critchley 2012). In this study I did not look to investigate or interpret the impact of the coaches approach on the matching process (including chemistry meetings) or building the relationship in coaching and methodology that I have chosen were not suitable to answering this type of research questions. However, I acknowledge the importance of this factor and suggest that future studies on this topic aim to isolate or standardise the coaching approach so as to elicit this impact.

Equally as mentioned in the ethics section of methodology there was a cultural dimension to some of the coaching relationships I researched. However none of them revealed experiences acknowledged by the participants as influenced by cultural differences. It would be also incompatible within the chosen methodological approach to speculate on how much impact the predominantly English, Western nature of the coaches and participants in this study may have impacted the findings.

No data emerged unprompted in terms of the generational differences between the coach and participant. However, I could include this question in the interview schedule. There is a recent work carried out to investigate the impact of generational differences in coaching (Gentry, Griggs, Deal, Mondore and Cox, 2011) and there could be an opportunity to explore this factor in my study. This could be seen as a potential limitation of the study and this connection could be further explored in future research.

Overall, despite some of these limitations and challenges I do feel that the methodology has proven to be an appropriate and effective for answering my research questions.

**5.3 Contribution to knowledge**

In terms of the contributions to knowledge I believe this research has given a voice that has not been sufficiently heard in the debate and discussion about matching – the voice of the coachee. From a phenomenological perspective this can be seen as powerful and significant in itself, and this was my primary ambition as a researcher. At the same time, I believe that what emerged as the result has added new insight into the issue of matching. This includes the initial perspective coachees have of coaching and their coach and how that perspective changes as the relationship develops. This supports the idea of increasing the importance of educating and empowering the coachee to take more responsibility and control of how they chose their coach, while recognizing that they do sometimes need help to avoid choosing the safe and the obvious.

I think that my research also has implication for the debate on the definitions of Leadership Coaching, i.e. the significant challenge of the linguistic transferability of terms such as coaching and mentoring. If the terms are being used differently or intertwined unconsciously it can lead to some misleading articulations of what the coachee is looking for in a prospective coach. This needs to be investigated further to see if there are wide differences in how the terms are being used and also what impact this has for coaching. Interestingly Stelter (2007) talks about the importance of Linguistics in the meaning making in coaching, and yet this research suggests that there maybe a fundamental difference of understanding of the actual concept of coaching at the critical point in deciding on the choice of the coach. This, in my opinion needs further investigation.

I think there is also a need to debate and investigate the central role of chemistry meetings in assisting coachees choose coaches in the Leadership context. There is a strong belief that chemistry meetings are incredibly helpful but yet the question is why are they still not being made readily available to all coachees? Equally is important what can be learnt about approaches to setting chemistry meetings. Reviewing the literature it is clear that even with leading researches into matching in coaching (Boyce and Hernez-Broome, 2010) there is a gap in knowledge about chemistry meetings and very little evidence based research to help people understand more about why they are important and how best to facilitate them. The findings of these study show that chemistry meetings are critical to the decision making process and should be further encouraged.

It seems that everybody gains something different from Leadership coaching and some argue that this is maybe one of the greatest strengths of Leadership coaching over other interventions as it is so personalized. It might also imply that if the coaching is so personalized then maybe the choice of coach should also be personalized. Back in 1998 Conway was dismissive of attempts to systematize the matching process and suggested that it is more appropriate to treat each case on an individual basis. I believe that this research adds to this discussion, and supports a view that, what is appropriate will depend on the needs of the individual concerned. Contrary to this, Wycherley and Cox (2007) argued that there was a danger that coachees may make ill-informed matching decisions based on factors such as initial rapport between coach and coachee. The findings of this study suggest that intention to be objective and subjective are paid off for different coachees. It does not seem reasonable to dismiss initial rapport over organizational experience for those who value it most. A key contribution to knowledge for the issue of matching is to show that making simplistic objective expert decisions on matching is missing a critical element in the success of the Leadership coaching relationship. Appreciating the complexity of this issue the message is about the importance of allowing the coachee to think about how they feel in the relationship with the coach and to think more about what they really need from their coach.

**5.4 Contribution to practice**

My main audience in terms of contribution to practice was the coachees and I hope the results of this research could encourage them to think critically and creatively about their needs. They would benefit from thinking how coaching could help them, including thinking more subjectively and personally about what that might need from their coach.

For coaches, as Passmore and Gibbes (2007) mentioned, “The benefits of coaching research for coaching practitioners is to help us better understand which interventions work and when. Many coaching psychologists already have an intuitive feel for what works and when, but research provides the evidence for our practice”. Clearly there is a message from this research to coachees that chemistry meetings add value. While those in the coaching industry know the criticality of the relationship for the success of the coaching; the coachee needs to be better informed about this and arguably encouraged to give more weight to it rather than factors such as experience of their industry or knowledge of their work.

For buyers of coaching I think there is an important message about offering choice and strongly encouraging chemistry meetings. Rather than purely attempting to match on the coaches gender, race or religion with the coachee, more value can be offered to coachees by remaining curious and interested in the clients’ culture and views and the underlying need for the coaching at both an goal/outcome level as well as an experience and relationship level and then provide a clear range of choices. As Wycherley and Cox (2007) advised, the coachee may benefit from experimenting and learning from a coach who is different to them, seeing difference in all its forms.

Coaches may find it useful presenting both mentor and coach qualities in their promotional material and think about the relationship match and how they can best enable that to emerge. They need to support the coachee in seeking out choice and in undertaking in proper chemistry meetings, not simply confirmatory meetings. Professional bodies may benefit from the debate about how to help promote a better understanding of how the coaching relationship will evolve over time and how coachees do not have the same level of knowledge or understanding of the difference between coaching and mentoring.

More generally for anyone supporting a coachee who chooses a coach and starts a coaching relationship I think this study shows that that they can have a critical and valuable role to play if they support and empower the coachee to use the findings from this research to make more thought-through decisions and choices. The role of being the expert who can make the best match is arguably overvalued. At the same time as suggested by Gray (2010) coachees need support in the decision process and help in avoiding their own biases and stereotypes.

**5.5 Future research**

Having spent the last four years immersed in this subject I can see a number of avenues for future research such as:

1. What aspects of a chemistry meeting are most helpful and why? It would useful to compare different approaches to chemistry meetings and how they affected confidence of decision and potentially the value of coaching over time.

2. Having made a strong case for the use of qualitative research in this area I think it would be interesting to look at the topic from a quantitative perspective as well and build on the work that de Haan and Sills (2009) have undertaken in using the Working Alliance Inventory (WAI) to measure the relationship between the coach and coachee. Maybe even using it before and after chemistry meetings.

3. I think there is a need to investigate further the effectiveness of coaching, which is a big topic, but building on this research to see if an effectiveness measure can show how the outcome of coaching changes over the period of the coaching relationship.

4. Research further into this potential misunderstanding around definitions of coaching by investigating whether there is a significant difference between how coaches use the word/concept of coaching and how coachees use the word/concept of coaching.

**5.6 Final reflections**

There is no doubt that choosing a coach and matching a coach to a coachee is a complex landscape as Jackson, Boyce and Neal (2012) concluded in their most recent research saying that

“Coaching relationships are complex, different in some ways from personal relationships, yet still influenced by some of those same, fundamental interpersonal dynamics. The client-coach relationship and, particularly, those relationship-building processes are critical to coaching effectiveness. ”

I believe the results of this study indicate that when you de-couple the personal in the interpersonal relationship you run the risk of making decisions about coaches, which may lead to binary and simplistic pairings of coach and coachee. This in turn may lead to missing out on the fundamental underlying needs of the coachee. This picture is potentially further confused with a lack of consistent and coherent agreement about what we all mean by coaching as compared to the longer established and more inculcated concept of mentoring.

I think it is clear that the future direction of leadership coaching depends on the successful collaboration of research and practice (cf. Zaccaro and Horn, 2003). I would like to think that in some small way my research is a collaboration of research and practice into the critical issues of matching and coaching relationships. As the one-on-one nature of leadership coaching requires special attention to the client–coach relationship I hope this study shows the importance of what matters to the coachee in that relationship, and how what matters can change over time.

Elaine Cox pointed out to me early on that my research was never primarily about matching but rather about coaching relationship, coachee expectations about coaching and coaches and how that changes over time. I do not disagree with this observation now but I would argue as the result of this study that it is all these factors that have the greatest impact on matching, not the other way around.

My overarching aim was to allow things to emerge from the data, from the coachee’s voice. I believe that has happened and consequently the main message of this study is the importance of empowering people to find out about their needs and how that might impact the decisions and choices they make about coaching. For as with the whole paradigm of coaching, the answer lies best within the coachee - we just need to ask the right questions to enable the coachee to find that answer.

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**APPENDIX**

**(i) Interview Questions used**

**Interview Template –**

**Interview (1) What are you looking for in a coach?**

- **Make sure connection is good**
- **Make sure recording and potentially record using two forms**
- **Back up all recordings**
- **Watch leading questions**
- **Watch leading or indicating correct answer with words and tone**
- **No opinion is valid data**

1. *Please describe your role and the area that you work in, including if you have a team and also your relationship with your line manager?*
2. *How much do you know about coaching and what initial views do you have about coaching? Have you received coaching and/or mentoring in the past*
3. *Why coaching now for you? Was or is there a triggering event?*
4. *What is your motivation for coaching*
5. *Please describe in your own words how you anticipate the coaching helping you?*
6. *How would you describe your personality and your working style?*
7. *Describe any other aspects of how you work and how people connect with you and give examples.*
8. *You may not have a view of this but is there anything in particular that you would be looking for in your coach, in terms of experience, background or personality or gender?*
9. *One way of thinking about what you are looking for in a coach is to think about other helping relationships you have experienced in the past, such as tutor, mentor, line manager etc. and describe the key qualities that these individuals possessed that facilitated the help they provided?*

**Interview Template –**

**Interview (2) Why have you chosen your coach?**

1. *Please describe in your own words your initial experiences of your prospective coaches?*
2. *Please describe in your own words how the chemistry meetings occurred?*
3. *Which coach have you chosen to work with?*
4. *Please can you describe in your own words how you arrived at that decision?*
5. *Describe any other aspects of your process in choosing a coach that you haven't already covered?*
6. *What are the practical issues in relation to coaching for you – location, mode, frequency and number of meetings?*

**Interview Template –**

**Interview (3) Your experience of your coach and coaching?**

1. *In your own words please can you describe how the coaching is going**?***
2. *In your own words please can you describe how the coach is supporting you**?***
3. *When we spoke at the start of this process you said you were looking for a coach who_____________________________________ (insert what they had articulated) how much of the support they have provided you would you describe in these terms?*
4. *Reflecting on that do you think you would have articulated a different set of requirements for your coach? If so what might they be?*
5. *When you chose your coach you said your reason for this decision was based on ______________________________________________ (insert what they had articulated) how much of what you have gained from your coach would you describe in these terms? If different things are now more important please describe these in your own words*
6. *If you were to go through the matching process again (or with hindsight), are there aspects of the process/decision that you would have done differently? If so please describe in your own words*
7. *If you were to talk to someone who was about to embark on a coaching relationship, and who had never chosen a coach before, what would you advise them to think about?*
8. *What else have you learnt about coaching or your process for making decisions?*

(ii) **Participant Information Sheet**

**Participant Information Sheet**

**Study title**
Choosing your Coach: What matters to the coachee and when?

As a coachee about to embark on a coaching relationship your perspective is particularly relevant to this study and I would therefore like to invite you to take part. While your organization has agreed to support your involvement, it is important to stress that you are in no way obligated to take part just because your organization has given that support. Before you decide it is important for you to understand why the research is being carried out and what it will involve. Please take time to read the following information carefully.

**What is the purpose of the study?**
This research investigates the way in which you as a coachee choose your coach and how your view on this choice changes over time. My research will look at this aspect of coaching through the lens of the coachee rather than the coach or sponsoring organization. To do this I will interview coachees so as to look at these issues from their personal experience. The research aims to advance understanding of the process that coachee's go through in making a choice and how that choice is a product of the time in the relationship. This concept has largely been neglected by researchers in the field, who have instead tended to focus investigations on the coach perspective, the organization perspective or attempted to produce 'expert' models of how to match coach to coachee.

**Why have I been invited to participate?**
To do this ~~I~~ will interview coachees so as to look at these issues from your personal experience. As you are about to start this process I am approaching you to see if you would like to be involved. I am planning to interview approximately 20 coachees in this study.

**Do I have to take part?**
It is entirely up to you to decide whether or not to take part in this research. If you do decide to participate you will be given this information sheet to keep and asked to sign a consent form. If you decide to take part you are still free to withdraw at any time without giving a reason.

**What will happen to me if I take part?**
If you decide to take part, you will be asked to participate in three interviews. The interviews at point 1 (what are you looking for in your coach) and point 2 (how you have you chosen your coach) will be conducted using a semi-structured interview approach. It is anticipated that both interview 1 and interview 2 will take place over the phone and will last approximately 30 minutes. The interview will occur at a time of your convenience, and will be arranged once if you agree to take part in the study. The interview at point 3 (reflecting on the coaching relationship you are now involved in) will be conducted face to face using a more unstructured in-depth interview approach and last approximately one hour. Interview 3 will take place approximately 3 months after you've started the coaching and will be arranged at a time of your convenience.

**What are the possible benefits of taking part?**

This will contribute to an enhanced understanding of the coachee perspective which has been neglected by researchers in the field. It may lead to real improvements in the matching of coachees to coaches which can have an impact on the success of the coaching intervention. In addition to the opportunity to take part in a worthwhile study, participation in this research provides participants with insights into how they make choices more generally and empower them to take more ownership of future choices.

**Will what I say in this study be kept confidential?**
The audio recordings made will be transcribed and analysed to generate themes and quotes about your experiences. All the data will be stored securely, be password protected and only pseudonyms will be used following data collection. Data generated will be retained in accordance with the University's policy on Academic integrity and the Data Protection Act.

The final Thesis will be completed by October 2012 and all data will need to be retained for five years following submission. After this all data will be destroyed. The data will be analysed only by the primary researcher so examiners will only have access to anonymized data.

**What should I do if I want to take part?**
If you decide to participate in this research please sign the attached consent form and email it to me. On receipt of your consent form I will be in touch to arrange our first interview and will at that point explain further how the process will follow from this point onwards. Whether you chose to take part in the research or not I will naturally still be in contact as part of the normal process of supporting you in finding and choosing a coach.

**What will happen to the results of the research study?**
The results of the data analysis will form part of a thesis for the Professional Doctorate in Coaching and Mentoring Practice with Oxford Brookes University. It is hoped that the data will subsequently be used in publication but under no circumstances will your name or any identifying characteristics be included in any written report. Names of all participants will be kept confidential. However it must be recognized that with small samples of 20 participants it is impossible to guarantee total anonymity. A summary of research findings will be available for all participants. If you wish to receive a copy of this *'Summary of Findings'* please request this at the time of the interview. Naturally, copies of any article(s) accepted for publication will be made available to you, should you wish to receive them.

**Who is organizing and funding the research?**
The research is being conducted as part of the Professional Doctorate in Coaching and Mentoring Practice with Oxford Brookes University within the School of Business under supervision of Dr Tatiana Bachkirova and Dr Jan Harwell. The research programme, which began in September 2009, will run for approximately 3 years.

**Who has reviewed the study?**
The research has been approved by the supervisory team and the University Research Ethics Committee, Oxford Brookes University.

**Contact for Further Information**
Should you require any further information, please do not hesitate to contact Charles Jones at, +44 (0) 7768 500822,or 09047872@brookes.ac.uk.. The supervisors can be contacted at the following email addresses - Dr Tatiana Bachkirova, tbachkirova@brookes.ac.uk. – Dr Jan Harwell, jharwell@brookes.ac.uk. If you have any concerns about the way in which the study is being conducted, please contact the Chair of the University Research Ethics Committee on ethics@brookes.ac.uk.

Thank you for taking the time to read this information sheet.

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**Date**
4th January 2010

(iii)

Consent Form

**CONSENT FORM**

**Full title of Project**: ***Choosing your Coach: What matters to the coachee and when?***

**Name, position and contact address of Researcher**:

Charles Jones; Mobile +44 (0) 7584 439076; cjo@mannaz.com

**Please initial box**

1. I confirm that I have read and understand the information sheet for the above study and have had the opportunity to ask questions. ☐

2. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving reason. ☐

3. I agree to take part in the above study. ☐

**Please tick box**

**Yes No**

**Include the following statements, if appropriate, *or delete this section from the consent form***:

4. I agree to the interviews being audio recorded

5. I accept that as the sample size is small (20 people) this may have implications for privacy/anonymity however all efforts will be made to protect it.

6. I agree to the use of anonymized quotes in publications

7. I agree that my data gathered in this study may be stored (after it has been anonymized) in a specialist data centre and may be used for future research.

| Name of Participant | Date | Signature |
|---|---|---|

| Name of Researcher | Date | Signature |
|---|---|---|

(iv) Organization consent form

**Letter for organization**

**Rachel Perkins**
Head of Talent Editorial, Enterprise and Sales and Trading

**Thomson Reuters**

26 January 2011

**Letter for organization**

**Rachel Perkins**
Head of Talent Editorial, Enterprize and Sales and Trading

**Thomson Reuters**

26 January 2011

Re: D.CAM research in Coachee's perspective on choosing a coach

To Charles Jones:

Please let this letter be indication of my permission for Charles Jones to conduct research for his thesis with staff employed by our organization who are about to embark on a coaching relationship. This research is solely for the purpose of Charles Jones' PhD and is not part of his business capacity.

Our agreement is that coachees, who agree to take part in the research, will be asked to participate in three interviews. The interviews at point 1 (what are they looking for in their coach) and point 2 (how they have chosen their coach) will be conducted using a semi-structured interview approach which will last approximately 30 mins. The interview at point 3 (reflecting on the coaching relationship they are now involved in) will be conducted using a more unstructured in-depth interview approach which will last approximately 1 hr. A large part of these interviews will cover ground that would naturally be discussed as part of the normal conversation they would have with Charles Jones in his role in helping them select an appropriate coach.

With participants permission interviews will be audio-taped. I understand that Thomson Reuters will retain anonymity as one of the organizations in which the research will be based.

All of those who participate in the research, in whatever manner, will be informed of their rights, including issues of confidentiality and consent. This responsibility will lie with Charles as the researcher. They will ~~be~~ not be coerced to participate in the research in any way, by myself or Charles Jones and will be free to withdraw at any point without giving a reason.

Should Thomson Reuters decide to withdraw our consent for our employees to participate in the research, we will give notice in writing of our decision.

Kind regards,

Signed Rachel Perkins

10.02.11

Rachel Perkins

Head of Talent Editorial, Enterprise and Sales and Trading, Thomson Reuters

(v) Participant Interview Schedule

| **Participant** | **Interview 1+2 Date** | **Duration** | **Interview 1+2 Location** | **Interview 3 Date** | **Duration** | **Interview 3 Location** |
|---|---|---|---|---|---|---|
| **Gary** | 2nd June 2011 | 26 minutes | His offices | 8th November 2011 | 28 minutes | His offices |
| **Amy** | 12th May 2011 | 30 minutes | Her offices | 6th December 2011 | 30 minutes | Coffee bar near her offices |
| **Aarti** | 13th June 2011 | 44 minutes | Hotel 20 minutes from his office | 31st October 2011 | 36 minutes | Hotel 20 minutes from his office |
| **Liam** | 5th July 2011 | 14 minutes | His house | 10th January 2012 | 20 minutes | His house |
| **Christine** | 18th August 2011 | 30 minutes | Her offices | 19th December 2011 | 25 minutes | Her offices |
| **Jane** | 20th September 2011 | 42 minutes | Telephone (she was in her office) | 17th January 2012 | 35 minutes | Telephone (she was in her office) |
| **Mark** | 7th October 2011 | 28 minutes | His offices | 26th January 2012 | 15 minutes | His offices |
| **Tony** | 28th November 2011 | 29 minutes | Book shop/Coffee bar near his offices | 6th March 2012 | 36 minutes | Hotel near his offices |

(v) First categorization of participant data

**Data Analysis – AM Interview 1 +2**

| **Topic** | **Quotes** | **Themes** | **Commentary** |
|---|---|---|---|
| Motivation for coaching | *One of the main things I wanted to achieve is be empowered how to pluck those visions our of air that I have in my head and bring them into reality and be able to relay the vision to those who I am dealing with* | Pointed out by those he trusted as helping him achieve even more | Respected leaders almost telling him this is going to be valuable |
| Previous Experience of Coaching | *I did not and I and only started formulating that concept in my own thematic understanding when I began to go to those group coaching's* | None beyond some group coaching | Didn't really know what to expect from a coach |
| Picture you had of coaching | *I do have a sense that the coach is a personal resource who would pretty much analyse me as a resource myself and see where the instability that I have in me as a resource shape those up so they become strengths, and the strength that I have maintain those at the forefront of my own visions.. of getting from A to B then*<br><br>*I believe a coach is someone who will bring you down to earth when you start racing ahead of yourself missing the forest from the trees* | Some quite sophisticated perceptions but quite a bit of telling and expert wrapped up in this | Is it more about what he feels he needs than what he knows about coaching? |
| What were you looking for in your coach | *I started looking individually at qualifications and I have to say some of them I had no idea what these qualifications meant they are just abbreviations but* | No real idea until he started reading the bios and then jumped | MBA because he has one and also because he values it? Long articulation follows on the |

| | | | |
|---|---|---|---|
| | *I noticed that the ones who hold MBA's tend to coach at higher level based on the coaching assignments they had undertook and I took it as a sign that as someone who would be able to elevate my abilities or to help me with my abilities to a much higher standard than otherwise so that was one*<br><br>*that person would be ideal for me to work with because if they understand what the NHS is , they understand what the business world is and if they could help me meld this together in my own person then that would achieve what I want to achieve* | to the MBA conclusion | differentiator of the MBA |
| How were you going to decide | *So based on those criteria I started weeding out of the 7 or8 people that I have left on the list.* | Criteria mentioned above plus geographical split | Had spent the time "filtering" as he said a decision process but it largely emerged spontaneously from the list |
| Meeting the coaches | *Yes, actually exactly 2 people, of the two. From the over the phone brief interview , umm I got the sense that Dianne has a better understanding umm of what the NHS is about. The other gentlemen had had encounters with the NHS but not as extensive or not as deep if you will.* | Telephone interviews | Already focusing on NHS experience |

| | | | |
|---|---|---|---|
| How did you make the decision | *perhaps I've been influenced that, she belongs to a company or a corporate that does coaching and having looked at the website of the company unlike the other gentleman who didn't have that association, that gave me a bit more confidence that you have multi sources company or assistance or organization that one of which is Dianne who can always fall back on the experience they have with other clients that gave me sort of a bit more faith if you will that this will be the right choice for me* | Criteria list then also added new factors | Association to a company equals credibility? |
| Consult with others on the decision | *She said well I've heard a few things but it wouldn't be fair to say more because it's your choice, all I could tell you is have a proper look at the, the coaching they did and see if it's NHS related or based and what have you because that's what you need. And I think that was something that influenced my, emphasized in my own mind someone who knows the NHS would be someone to go after and Elaine herself is an MBA holder, umm and perhaps I make the association I don't know,*<br><br>*Ummm I did discuss with my wife but I didn't consult it with my wife because she's wouldn't have been able to give me the right input even if she tried* | Explicitly asked one of his 'bosses'<br><br>Wife | This appears to me have quite importantly influenced his thinking and probably confirmed the model he wanted to apply<br><br>Why we should have insights she doesn't work for the NHS??? |

| | | | |
|---|---|---|---|
| What will the end look like | *So that is my long term vision and hopefully with the pieces of the jigsaw puzzle with Dianne and others that can help me move towards that stage,* | Clear sense of where he wants to be and coaching slots into that | Has a vision, wants input, validation, challenge from the coach? |
| How make the decision | *I... it was actually in the call itself, a few minutes into the conversation she came across on the phone as someone who is more robust, more to the point, more NHS, let's talk NHS, more yeah. It's not like the other guy, Dave was you know any less but he didn't, he sounded like as if what you want to do we'll do it. urrgh no I wanted you to tell me what I can and can not achieve ...I'll tell you my vision I'll share what my vision is like but I want you to help me because you supposed to be the coach.*<br><br>*Well like I said, it wasn't, it wasn't something that I sat down and made a decision matrix .. I did not know how to start the decision matrix and I could not know what I wanted to put what decision where and instead of ending up over complicating things, just come back a bit and simplify things and see how it goes* | Criteria plus a 'sense' from the chemistry calls<br><br>Acknowledges himself it emerged | Confident in trusting his own process and the emergent criteria that he kept creating, didn't want too reflective a coach, likes validation and feeding |
| The importance of the connection | *Although we discussed, she (wife) said you know how do you feel, which obviously is not very scientific when it comes to that choice but I realized umm that it will have to be a bit more systemic then how do you feel, it has to be more then based on* | Almost rejects the feeling approach | Wanted to step back and be careful about how he made his decision |

| | | | |
|---|---|---|---|
| | *how you feel. So I looked around and I did thing of other employees but I have to say I didn't want to talk to anyone else other than Jeremy perhaps and Elaine would have been the right person to talk and something completely irrelevant to this* | | |

**First Narrative Conclusion**

- Initially talks quite a bit around the coach who can bring out the best in him but it does sounds like quite a bit of telling and expertise from the coach
- Very bright and articulate (verbose) and quickly develops a well put together self fulfilling articulation at the cognitive conceptual level of the importance of NHS and MBA blend. Very little commentary though on the relationship, trust etc.
- Very sophisticated confidence in his own emergent criteria and how he could then articulate the why – although again it is quite a cognitive model he describes
- Led towards a decision process also by his boss – also an MBA club member!
- Fascinating that in the end he almost explicitly says dismiss the feeling element
- Will be really interesting to see if there is a contrast in interview 3