The co-created boundary: negotiating the limits of coaching[1]

Alison Maxwell, Alison Maxwell Coaching Ltd., Stamford, Lincs PE92SU
Email contact : info@alisonmaxwell.com

Abstract

This paper explores how business coaches experience the boundary between coaching and therapy in their practice. Using a phenomenological approach, four therapeutically trained and four non-therapeutically trained coaches were asked to describe instances when they felt they were working near the 'boundary'. Findings suggest that issues of a psychological nature are brought into coaching, and that the 'boundary' is largely a function of the willingness and ability of both coach *and* client to work with personal/psychological material. Differences in working practice were noted between and within the two groups. Findings also give impetus for more rigorous coach training as well as suggesting a potentially fruitful tool for use in coach supervision.

Keywords: coaching, therapy, counselling, boundary, ethics, training, supervision.

Introduction

In recent years there has been an explosion in both the numbers of those offering coaching services (Berglas, 2002), and the range of activities included under the banner of 'coaching'. This growth has been almost entirely unregulated and there have been mounting calls for the 'professionalisation' of the industry (e.g. Bluckert, 2004). However, as yet, the coaching world is a long way from being able to call itself a true profession, and Grant and Cavanagh (2004, p. 10-11) highlight the 'need to find a way to establish a clear identity… by establishing clear boundaries around what is professional coaching and what is not'. This is easier said than done, and it is possible to find multiple definitions of coaching in the literature reflecting different perspectives and interests (e.g. Bluckert 2005a, Sperry 1993, Tobias 1996).

This issue is particularly acute in relation to coaching and therapy/counselling and many writers are at pains to differentiate coaching from therapy/counselling. Typical distinctions include:

- Coaching takes a present and future focus, whilst therapy concentrates on the past (e.g. Pointon, 2003, Williams, 2003)
- Coaching is for highly functioning people, whilst therapy is for people with some level of dysfunction or disorder (e.g. Grant, 2001, Williams 2003)
- Coaching is focussed on (business) performance improvement, while therapy is focussed on personal healing and trauma recovery (e.g. Dawdy 2003, Garvey 2004)
- Therapy operates at psychological and emotional 'depth', coaching incorporates understanding of business drivers and dynamics (e.g. Hart et al 2001)

[1] Findings from this study have also been reported in

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- Therapy is a confidential two-way relationship, coaching involves (at least) a three-way contract between client and commissioning organisation with potential for blurred confidentiality. (e.g. Zeus & Skiffington, 2000)
- Therapy is usually a protracted relationship, whereas coaching is usually tightly time-limited (e.g. Rotenburg 2000)
- Therapists and counsellors are typically highly trained and regulated by codes of ethics and professional bodies, with formalised continuing professional development based on well developed theoretical underpinnings. Coaches are limited only by their ability to attract clients. (e.g. Carroll, 2003)
- Therapists typically attract moderate/low hourly rates, whereas coaches, particularly, executive coaches, can command much higher rates (e.g. Channer 2003)

More recently, other authors have focussed on the difficulties of making such definitive distinctions and point to the numerous ways in which the 'boundary' between coaching and therapy/counselling is blurred or confused. For example, Buckley (2007b) questions the notion that coaching is for the mentally healthy only, contending that therapists are as likely to work on developmental issues as well as remedial ones. Equally Simons (2006) argues that coaches cannot be limited to a present/future focus if they are to work effectively, while Popovic and Boniwell (2007, p.25) state that 'The truth is that all these practices rely heavily on similar skills and their domains overlap to a large extent'. Similarly Bachkirova and Cox (2005, p. 5) contend that 'Coaches cannot avoid working with 'blocks' to development within the client' and argue that coaches need to build on the body of knowledge already developed by psychotherapy and counselling.

Many authors (e.g. Bachkirova, 2007, Campbell and Griffiths 2008) regard this topic as more than a semantic debate. Currently in the UK, there is no compulsion, other than personal ethics, for a business coach to adhere to any professional code of ethics, never mind invest in training or supervision. Few training courses have substantial psychological content (Grant and Zackon, 2004), and even fewer give practical guidance on mental health issues. Such training would, of course, be unnecessary if coaches could always guarantee that their clients were happily free of such conditions, or that their personal psychological histories do not impact their present day work lives.

Whilst writers such as Grant (2006) and Berglas (2002) disagree as to the potential for damaging clients, most professional bodies (e.g. EMCC 2007, Association for Coaching 2005) recognise the need for practitioners to operate within the confines of their competence and not to stray into areas in which they are untrained or unprepared. Again, this is easier said than done, and it is left for practitioners to define their own limits of practice, including when they perceive they may be straying inappropriately into the territory of counselling and therapy. Ultimately practitioners must decide what constitutes appropriate practice, defining the 'boundary' for themselves as they meet each client.

While the debate continues to rage, there is a dearth of empirical research into how coaches experience the practical and ethical issues, or indeed how they construe the conceptual 'boundary' for themselves. Existing relevant studies (e.g. Hart et al, 2001; Channer, 2003; Alves Marques, 2006) have largely focussed on the experiences of therapists and counsellors transitioning into coaching and there is no specific research on how practitioners recognise and work at the coaching/therapy boundary. This paper therefore contributes uniquely to the debate by seeking to explore situations where coaches considered themselves to be working near or at the 'boundary'. As such it provides empirical evidence in an area often characterised by rhetoric,

self-interest and opinion. The study potentially provides a benchmark for coaches to examine their own choices in this area, and suggests a framework for discussion of what constitutes 'appropriate' working in a coaching context.

Study Method

Necessarily, because of the experiential, constructivist nature of the research topic, the study method leant itself to an interpretivist, qualitative approach. A form of phenomenological investigation was developed to gain insight into how coaches experience and construe 'boundary' working. The investigation included use of in-depth semi-structured interviews, incorporating a 'conceptual encounter, as well as an interpretive phenomenological method of data analysis. This combined approach was an attempt to recognise the role and stance of the researcher whilst minimising the potential for distortion of the final outputs. A reflexive approach was therefore central to the methodology, and essential given the researcher's own experiences of 'boundary' working.

Sample

The research sample comprised eight practicing business/executive coaches, selected for their substantial experience of working as a coach. On average sample members had 11 years of commercial coaching in large organisations. While all had previous experience in organisational roles, Coaches 1-4 (termed the 'business-coaches') had held senior executive roles in large organisation prior to becoming coaches. Coaches 5-8 (termed the 'therapist-coaches') had also substantial psychological training, including experience as a therapist or counsellor. Their backgrounds included a wide diversity of training including Psycho-synthesis, Gestalt, Person-centred counselling and Cognitive-Behavioural therapy. With one exception, all coaches were in regular supervision for their work, and five were members of one or more coaching professional body (e.g. EMCC, APECS, Association for Coaches, ICF).

Data collection and analysis

Using in-depth semi-structured interviews, the coaches were asked to recount in detail instances of when they felt they were working at the 'boundary' with therapy/counselling in a coaching context. Participants were free to select their own examples and therefore define what constituted 'boundary' working for them. This process yielded some 10 hours of interview material, which were transcribed and verified with participants.

In addition, a form of 'conceptual encounter' (de Rivera 1981, McLeod 2001 p. 46-47) was used at the end of each interview. This involved the researcher sharing a personal experience of 'boundary' working followed by discussion of how the research participant's experiences contrasted or diverged from those of the researcher. This material was progressively evolved into a 'concept diagram/map' for both business-coach and therapist-coach groups. This step was included to bring transparency regarding the researcher's own initial position in the study, and as a cross-check with the more detailed analysis of the interview data.

Interview data were analysed using interpretive phenomenological analysis (IPA) (Smith and Osborn, 2008 pp 53-80; Smith and Eatough, 2007). This idiographic mode of enquiry is deemed particularly appropriate when the aim is 'to say something in detail about the perceptions and understandings of a particular group' (Smith and Osborn, 2008 p.55), without prematurely making more general claims.

The IPA method involved repeated readings of individual transcripts to identify relevant material and initial themes. Connections were then investigated and clusters of themes evolved, repeatedly cross-checking against the original text to ensure preservation of meanings. (Smith and Osborn, 2008).The resultant analyses were verified with participants and further amendments made. At the final stage, master themes were distilled from across all eight analyses, and referenced to typical quotes to illustrate and illuminate the material. Cross-referencing and checking within and between transcripts was therefore a necessary, if time consuming, activity to ensure the integrity of the final synthesis.

Findings

Perhaps the single most striking feature of the interviews was the wide variety of issues described by participants as examples of 'boundary' issues, including depression, anxiety attacks, bereavement, behavioural issues and relationship problems. While some coaches reported such instances as relatively unusual, others (typically the therapist-coaches) reported themselves as working at the 'boundary' more frequently. Clearly, in this sample at least, the personal and the professional were deeply intertwined, and many coaches commented on how the 'whole human' inevitably shows up for coaching:

> *".. Because people don't turn up for coaching sessions with just their business issues. They turn up with their hang ups and their brains.. the whole damn human being. That messy thing turns up and sits in the room" (Coach 1)*

Broadly, these 'whole human' issues fell into three categories:
- Transient or present day issues triggered by some sort of recent (traumatic) event e.g. recent redundancy, relationship break-down, bereavement etc. These were often highly charged and presented in a very emotional way in the sessions.
- Entrenched historic or behavioural pattern played out in the present e.g. low self esteem or confidence issues borne out of an overbearing parent, relationship problems with men/women rooted in family relationships. These patterns were often well known to the clients, but were sometimes uncovered through the dialogue
- Hybrid situations in which a recent event was triggering or re-evoking some much older pattern or distress, e.g. depression, alcoholism, anxiety attacks. These triggers were typically uncovered after prolonged and extensive discussion.

The coaches perceived all these issues as impacting their client's ability to function at work, to a greater or lesser extent. Such blocks to work performance were therefore perceived as legitimate coaching territory, and only one instance was described where the coach declined to work and referred the client. Interestingly six of coaches reported working in parallel with some other form of professional (e.g. doctor, counsellor, hypnotist, alcohol specialist), with some insisting on this as a condition of the work.

The co-created boundary

A major feature of the interviews was the variety of ways in which the coaching/therapy 'boundary' was co-created in the relationship:

> *"So I think the line is really, really hard to define –it's in different places for different clients and I suspect it is in very different places for different coaches"*
> *Coach 1*
> *"It's the co-active piece; together we co-create our relationship" Coach 2*

At one extreme, in some relationships the 'boundary' seemed to be relatively 'conservative' with both client and coach avoiding any discussion of personal material. However in other relationships, both coach and client seemed willing to undertake deep and extremely personal explorations. Three factors seemed to have a bearing on how the 'boundary' was configured in each relationship:

1. Client shapes the 'boundary' – motivations, willingness, resourcefulness

The interviews highlighted a variety of client motivations for entering into a coaching relationship, ranging from those with a 'pure' business focus, to those with a more personal agenda. However, in many cases, whilst ostensibly driven by a business agenda, clients wished to undertake some level of personal work. So while some clients seemed to have difficulty (or resisted) discussing the impact of the personal on the professional, it was precisely this intersection that others seemed to want to explore. Indeed one therapist-coach was of the view that many of her client's had unconscious needs for therapy, even if they had signed up for coaching.

In parallel with this range of motivations, was also a spectrum of willingness to disclose personal material. At one end of the spectrum were clients who seemed to have an immediate need to unburden themselves, often emotionally, to their coach. Others were happy to disclose personal information when asked by the coach, and gave the coach a lot of permission and scope to explore from an early stage:

> "*He would be very much saying things like 'well of course, of course we will talk about that, if that is what it takes then we will talk about that'. Very, very open to going anywhere really" Coach 6*

However it was not unusual, as noted above, for clients to display some level of defensiveness, reticence or reserve particularly at the early stages of the relationship, placing limits on what they were willing to discuss:

> "*He was beginning to lay down his ground rules, which was 'If I find this uncomfortable..I will tell you to stop and I'm very capable of doing that"*
> *Coach 3*

However commonly, as the level of trust developed in the coaching relationship, it appeared that the 'boundary' would shift, with the client becoming increasingly willing to both disclose and discuss personal issues:

> *"Also I think the boundary softened ...as we worked together and I think as she became more confident that I might have known what I was talking about"*
> *Coach 6*

A further feature of the data related to the perceived level of self-awareness and 'resourcefulness' in the client – variously defined by the coaches as the client's ability to discuss

and process personal and/or emotive matters in a rational way. This criterion of 'resourcefulness' seems to have been a determining factor for many coaches in deciding whether their clients were suitable for coaching in the first place and indeed how far they could take the dialogue:

> *"There is a degree of resourcefulness in his ability to get a handle .. it means I can take him slightly closer to the line and trust his resourcefulness to hold him where he needs to" Coach 2*

However this quality of rationality and 'resourcefulness' both constrained and enabled the conversation. For example several coaches mentioned how the strong cognitive abilities of their clients proved an asset, enabling them to look at more emotive issues dispassionately, enabling them to link between their presenting behaviours and the roots of their issues.

> *"What I was trying to do all the way through it quite consciously was to have an intellectual conversation to engage his head, rather than an emotional conversation because if we'd have had an emotional conversation my sense was we'd have to deal with the anxiety in the space" Coach 2*

> *"It was quite intellectual, rational analysis which she could do, which didn't force her to focus intensely on how she was feeling" Coach 6*

For others however, the quality of strong rationality appeared to place more of a break on the discussion, especially when the relevance of the personal to the professional agenda became unclear:

> *"She would ask 'Why are we talking about this? What has this to do with anything?'. She is the one who would stop. And I realised that when she did that I had stopped the linking process, I had stopped signposting" Coach 6*

2. *Coach shapes the 'boundary'- ethics, perception of role and personal competence*

Just as the qualities of the client seemed to shape the nature of the coaching conversation, several qualities of the coach also seemed to have a bearing. For example, most of the participants emphasised the need for ethical and responsible working, particularly when emotional or sensitive material was raised. The need for complete confidentiality was stressed and several (particularly the therapeutically trained) highlighted the importance and value of supervision. While few mentioned the potential for doing harm, business-coaches tended to be concerned for the potential for embarrassing or intruding upon the client. In contrast therapist-coaches tended to be more concerned for potential transference or collusion in the relationship.

Most coaches perceived that there was a limit to their work, expressing this often as a role or competence limit:

> *"I am not a counsellor, I am not a marriage guidance counsellor and I will make, very much, clear my role" Coach 4*

> *"I don't think I could do more than helping her to acknowledge and understand the impact that it is having" Coach 1*

However, three of therapist coaches talked much more in terms of 'straddling', 'bridging' or 'shuttling' between coaching and therapy. This was also the group that saw themselves as working most frequently in 'boundary' situations. Rather than attempting to avoid the personal, historic or emotional, these coaches tended to see these dimensions as central and causal to their client's work performance and therefore as necessary and appropriate territory for investigation. Indeed, two of these therapist-coaches saw the 'boundary' less as a limitation, so much as a point of maximum leverage for change and growth:

> *"And it is the area I am most excited about because I think the most work can be done and it has the most impact. If I can end up helping people with their personal relationships and as result they bring more to work, then I think that is fantastic" Coach 5*

The notion of a 'boundary' was therefore for this group, a somewhat illusory and unhelpful concept:

> *" I don't think I am saying to myself 'Now I am doing therapy or now I am doing coaching, or I am doing a bit of both' I don't think that is how I think about it.. whereas I think moving fluidly across or through or from one to the other, if there is such a thing is part of what gives me a lot of satisfaction in what I do" Coach 6*

> *"If you have skill it seems to me darned silly not to use it when it's to the benefit of the client" Coach 8*

3. *Organisational contract shapes the boundary*

Just as the quality of the coach and client had a place in 'shaping' the boundary, the influence of the third party in the relationship – the organisational paymaster- also impacted. Most coaches expressed the tension that could arise when the personal agenda began to diverge from the organisational agenda:

> *"The challenge for me ... is how to hold both? So the organisation who is paying my salary or paying my fee wants this, so what does the client want?" Coach 2*

This conflict seemed to be resolved in two primary ways – either by steering away from discussions of a more personal nature and staying with contracted (organisational) agenda, or by rationalising the personal material as a 'blocker' to performance and therefore as appropriate coaching territory.

> *"I think you have to remember who is paying the bill, and that they should have legitimate inputs into what the objectives of the coaching should be" Coach 7*

> *"Every client you work with successfully, the success lies in helping them to identify what's stopping them. It's never they can't do that, it's never that. They can do it, they just don't. So what is getting in the way?" Coach 1*

However in some instances, this source of conflict appeared not to arise as the commissioning organisation seemed to be well aware of the client's personal problems and was using coaching to address the impact these were having on performance. Two of the therapist-coaches believed

that their client organisation particularly valued them precisely for their therapeutic background, and had sought them out because of their psychological backgrounds, not despite it:

> *"So I often get asked to do those sorts of assignments because they know I have a both a business and therapy background" Coach 6*
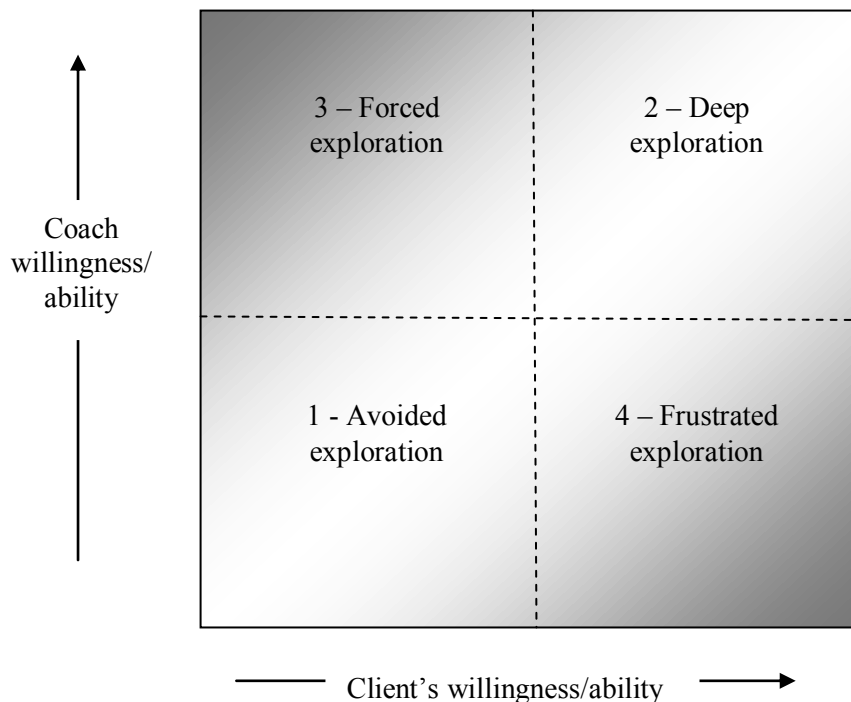
> *"What you're actually being employed for is a hybrid... they're actually wanting psychological coaching" Coach 8.*

Discussion

The concept of a dynamic and co-created 'boundary' was an interesting and unexpected feature of the interviews. This feature has received scant attention in the coaching literature although it has been more discussion of this in the therapeutic world (e.g. Clarkson, 2003). Rather than a static, externally defined entity, in practice it appears that the coaching/therapy 'boundary' is dynamically configured in each relationship, as function of the coach *and* client's willingness/ability to explore the intersection of the personal and the professional. This can be conceptualised as in Figure 1.

This diagram suggests that 'safe' or 'appropriate' dialogue exists where there is a match between the client and coaches willingness/ability to engage (boxes 1 and 2). In box 1 the personal conversation is avoided or minimised, while in box 2 the pairing undertake wide ranging and deeper exploration with fewer self-imposed limitations. In both these areas there is a mutual and tacit agreement as to the 'position' of the boundary.

Figure 1: The co-created boundary

Coach willingness/ability (vertical axis)

Client's willingness/ability (horizontal axis)

3 – Forced exploration

2 – Deep exploration

1 - Avoided exploration

4 – Frustrated exploration

These territories however are not without potential problems. The 'avoided' dialogue runs the risk of being relatively superficial and perhaps unproductive, especially if underlying issues remain unaddressed. Conversely, the 'deep exploration' terrain runs the risk of tipping into a quasi-therapeutic work and potentially overstepping the boundaries of the contracted relationship. Finally, it is also problematic to assume that willingness to work equates with the ability to do so – a coach keen to work at psychological depth without the commensurate skills is potentially a risk to themselves and their client.

Boxes 3 and 4 represent problematic situations of a different nature. In these areas there is a mismatch of expectation between the coach and client. For example in situations where coaches attempt to work more deeply than the client is (currently) comfortable with (box 3), there is the danger of a forced or coercive dialogue. In these sorts of situations the coach must either educate the client to tolerate/accept deeper work, or retreat to more acceptable territory. Perhaps less common are situations where the coach refuses to work as deeply as the client would like (box 4). This is likely to result in a frustrated dialogue with the potential for the coaching to be perceived as superficial or ineffective. The coach in this situation must therefore either refer on to those who are more willing or equipped or explore their own reticences and self-limitations, perhaps with the aid of a supervisor.

Overlaying these scenarios is the influence of the organisational expectation of the coaching work, and whether there is permission to extend the work beyond a purely business agenda. The question of what constitutes an appropriate coaching conversation is therefore considerably more complex and subtle than much of the literature would suggest.

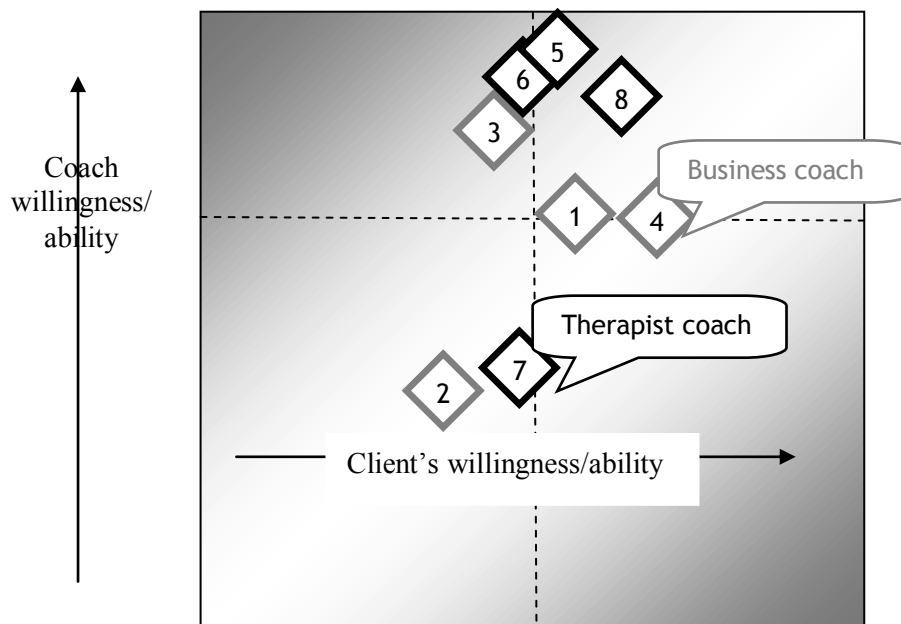Figure 2: Mapping the 'boundary' between coaches and clients.

Figure 2 attempts to map approximately the coaching relationships described in the interviews. From this it is apparent that therapeutically trained coaches, perhaps unsurprisingly, seem to display a greater willingness to work with the personal and the professional. An exception to this was Coach 7, who tended to stress the systemic dimensions of his work rather than the psychological, and who held clear views about the inappropriateness of any contagion with therapy. The business-coaches showed more diversity of working, with Coach 2 and 3 taking the most extreme positions, perhaps mirroring the differences in their familiarity with psychology. Interestingly, Coaches 3, 5, 6 and 8 also reported themselves as most frequently encountering 'boundary' situations in coaching.

Conclusions and Recommendations

Coaching is going through the birth pangs of becoming a recognised profession and as such is tussling with questions of definition, competency requirements, ethics and regulation. This study contributes to that debate, informing how business coaches define the limits of their work. Due to its in-depth nature IPA is necessarily a more appropriate methodology for small sample groups and findings are not necessarily generalisable, although there was substantive agreement with other empirical research. The sample group was a relatively experienced group and findings may thus represent something of a high benchmark. It is therefore possible that general awareness of the issues and relevant skills for handling these complex situations may be somewhat lower than portrayed by this sample. Further qualitative work could therefore be usefully done with i) less experienced/trained coaches, and ii) other forms of coaching e.g. life coaching. Quantitative work is also required to establish the prevalence of 'boundary' working within wider populations of coaches.

However it is very clear, from this sample at least, that the personal and the professional are deeply intertwined in the coaching conversation, and attempts to compartmentalise these by either coach or client are unrealistic. Coaches must therefore be prepared to work with the 'whole human' whilst maintaining a focus on the agreed contract. This supports arguments (Bachkirova and Cox, 2005) that coaches cannot avoid working with psychological blocks and refutes ideas that coaches work only with the positive aspects of their clients.

Working with psychological blocks is not necessarily problematic if coaches operate within their competence and remit, but gives rise to serious ethical, moral and potentially legal questions otherwise. Coaching risks being superficial at best if it cannot investigate the 'whole human' but coaches must be equipped to explore the territory safely and at appropriate depth, or refer on to those who can. The study suggests that the coaching/therapy boundary, rather than being a definable absolute, is a negotiated product of both the coach and client's willingness and ability to explore the intersection of the personal and professional.

This paper has proposed a model for exploring what constitutes an 'appropriate' coaching conversation, and offers a potentially useful tool for this discussion within the context of coaching supervision. It suggests that willingness to work at any psychological 'depth' must be matched by commensurate skills, and implies the need for less optional and more rigorous coach training than at present (Bachkirova, 2007). The successful tri-partite model of supervision, personal development and theoretical knowledge long adopted by therapists and counsellors to underpin their practice, therefore seems a sensible and perhaps inevitable direction to go. However comprehensive psychological training does not imply a 'carte blanche' and coaches must continue to be mindful of the contracted remit of their work as well as the level of permission granted to them by their clients.

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Alison Maxwell is an organisation development consultant and team coach with over 25 years experience of large organisations, working in manufacturing, nationalised industry, pharmaceuticals, travel, financial services, and retail sectors. She has recently completed an MA in Coaching & Mentoring with distinction (Oxford Brookes University), adding to her qualifications in advanced development (Ashridge), advanced facilitation and change agency (Sheppard Moscow). She has also completed a 3 year programme on the as application of Gestalt to Organisations and is qualified in psychometric type and trait assessment including Myers Briggs, OAD and JAX tools. Alison is a founder member of the Centre for Applied Positive Psychology and is an active member of the European Mentoring and Coaching Council and the Association for Coaching.