"It can be Life-Changing"; an Interpretative Phenomenological Analysis of the Coach and Coachee's Experience of Psychometrics in Coaching

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Abstract

This research explores the coach and coachee's experience of psychometrics in coaching with specific reference to the conversation and the relationship. Three coaches and three coachees were recruited and IPA informed the data collection and analysis. The results indicate that psychometrics affect the speed at which issues are accessed, the depth at which coach and coachee work and the nature of their discussions. The relationship emerges as the most critical aspect of the coaching and potentially a pre-requisite to the introduction of a psychometric. Participants highlight the potential for coaches to require knowledge and skills that are currently neither provided in coach training nor in psychometrics training. The implications for the coaching profession, training providers, the psychometrics industry, and for those employing coaches are discussed.

Keywords: Experience, Coaching, Psychometrics, Conversation, Relationship

Introduction

The use of psychometrics in coaching is widespread and rising (Passmore, 2008), receiving increased attention in the literature. McDowall & Kurz, (2007) suggest that the 'skilful use… [of psychometrics]…can add value to any coaching process' (p. 301). This bold claim goes to the heart of this study.

Over the last ten years, I have trained in a variety of psychometrics which I use within my coaching practice by agreement with the coachee. Anecdotally, a range of views appear to exist concerning the use of psychometrics in development generally and in coaching in particular. Given this breadth of opinion, I wanted to establish how psychometrics are seen across the coaching profession by examining existing literature and research outputs. I investigated, assuming there would be a body of empirical research to draw on. However, whilst this initially appears to be true, (Harper, 2008) on further examination, this is not the case. There is indeed a great deal of literature on *psychometrics,* particularly concerning recruitment and leadership development. There is also a burgeoning body of work on *coaching*. Nevertheless*,* there is far less on psychometrics and coaching *together*, particularly work that is research or evidence based. What exists considers why coaches use psychometrics, when and how they are introduced and the benefits/pitfalls of using them. Little is available concerning what actually happens to the coaching following the introduction of a psychometric, particularly from the coachee's point of view. Much that exists may be partisan as it is

written by those with a vested interest in promoting psychometrics. The literature concerning the coaching *relationship* tends to consider its importance relative to other variables involved in coaching. Research considering what factors contribute to its development is in its infancy.

The lack of evidence to support or contradict individual claims about the value of psychometrics in practice generated my research question involving two inter-related threads: the *experience* of psychometrics in coaching and the development/progression of the *conversation* and the *relationship*. This is clearly of potential interest to the coaching profession. Organisations offering training for coaches might also find it relevant, as most coach training gives at least cursory attention to the use of such instruments. Organisations that commission coaching and incur additional expense where psychometrics are used may also find the study helpful as may the psychometrics industry and potential coachees.

This paper comprises seven sections including a context for the study in the introduction, a literature review, evidencing current empirical research, a methodology section detailing the approach used (IPA), a section on findings outlining the major themes that emerged, a discussion section exploring highlighted findings, a section on limitations followed by a summary and conclusion, with recommendations for further research.

Literature review

The literature review comprises two parts, reflecting the main areas within the research question.

Part One Psychometrics in Coaching

What tools are used?

Psychometrics, or tools for psychological measurement, are widely used in recruitment and selection, leadership development and increasingly within coaching. Within the literature, a vast range of available instruments is identified. Passmore (2008) offers an introduction to the main issues around using psychometrics in coaching and an overview of some of those commonly used. These include the Myers Briggs Type Indicator (MBTI), Saville Wave, the Occupational Personality Questionnaire (OPQ) and the Hogan Development Survey (HDS). Each contributor offers the theory and research behind the particular instrument, an overview of the questionnaire and an analysis of application from coach and coachee's perspective. Elsewhere, the MBTI is advocated as particularly helpful for executive coaching (Fitzgerald, 2002). Kummerow (2000) discusses the Strong Interest Inventory, offering case studies outlining how it has helped in "career counselling" used alongside the MBTI. McDowall & Kurz (2007) describe the complex utility of SavilleWave, its flexibility and particular value for "performance coaching" (p. 308).

Why are psychometrics introduced; what benefits are perceived?

The literature suggests that coaches use psychometrics because they find them useful to both the coach **and** coachee. First, coaches believe that psychometrics enable *them* to assess their own strengths and adjust their style towards the personality and needs of the coachee, particularly when coaching people who are different from them (Krebs-Hirsch & Kise 2000; Passmore *et al.* 2006; Carr *et al.*, 2008). Coaches may also use psychometrics to identify their own potential for derailment as well as the coachee's . Nelson & Hogan (2009) propose that psychometrics help coaches facilitate coachees' understanding of interpersonal experiences and target developmental suggestions to their

specific needs, offering "a more systematic strategy for identifying leaders' strengths and development opportunities" (p. 7). Psychometrics may enrich the coach's data-gathering capacity (Wasylyshyn, 2003), generating material that they can use to structure their work (McDowall & Smewing, 2009) or to "scaffold the coaching" (Beddoes-Jones & Miller, 2007, p. 60). According to Rogers (2008), psychometrics "offer a short-cut through what otherwise takes many hours" (p.103) quickly opening up discussion areas (McDowall & Smewing, 2009), helping coaches gain an understanding of the client. Instruments such as the MBTI offer clues about the coachees' cognitive style, the way they process feelings, or the kind of coaching relationship they might want (Kauffman, 2010).

Secondly, for the *coachee*, the main perceived benefits concern the (usually speedy) development of greater understanding of themselves, of others and the value of individual difference, particularly in the workplace (Harper, 2008; Bluckert, 2006; Passmore, 2007; Ruben & Schmuckler, 2003; Carr *et al.* 2008; Nelson & Hogan, 2009). "Psychometrics offer a useful way to demonstrate in what ways we are like and unlike others" (Rogers, 2008, p.103) providing a useful framework to analyse situations involving people (Wade, 2004). Psychometrics can offer coachees unique insights into who they are (Beddoes-Jones & Miller, 2007) and into their preferred working style (Wallace, 2009), identifying areas for development *and* strengths to build on (Wallace, 2009; Carr *et al.* 2008). Scoular (2007) suggests that people new to coaching may find the psychometric's impact the most powerful outcome of the experience. For coach and coachee, psychometrics offer a shared vocabulary to assist communication (Harper, 2008) and a way to understand the gap between the unconscious and conscious, empowering people to make informed decisions.

When are psychometrics used?

Psychometrics appear to be most frequently used at the beginning of coaching relationships (Kurz *et al.* 2008; Rogers, 2008; Carr *et al.* 2008; Nelson & Hogan, 2009). However, the need for coaches to think carefully about *why* they intend to use them before doing so is emphasised. It is suggested that using psychometrics may reflect a coach's inexperience or lack of confidence, disturbing the power balance within the relationship and affecting it adversely. (Rogers, 2008; Bluckert, 2006). This is one of the few allusions to the *impact* of instruments on the relationship. Within the same literature, there is a *clear* message about the significance of the relationship *and* the coaches' feedback skills which are " just as important as the quality and choice of instrument" (McDowall & Smewing, 2009, p. 99). Champion & Harrison (2010) suggest that the HDS "relies on a strong relationship with coach and client" (2010, p. 20). The need to be aware of the background and underlying psychological assumptions of the instruments is highlighted, (Allworth & Passmore, 2008) as is the need to ensure that coaches are trained in the instruments they use, skilful, flexible, self-aware and prioritise the relationship above anything else (Kauffman, 2010). This suggests that the possibility that using psychometrics could influence the coaching relationship has been considered.

Part Two – The conversation and the relationship

"There appears to be universal agreement on the importance of the relationship within coaching" (Machin, 2010, p. 37). This is reflected time and again in the coaching literature (Whitworth *et al.* 1998; Flaherty, 2005; Stober *et al,* 2006; Rogers, 2008; Biswas-Diener, 2009; O'Broin & Palmer, 2010; de Haan, *et al.* 2011). Wales (2002) concludes that "the quality of the relationship is crucial to the outcome, providing the container, stimulus and support for the changes that result from coaching" (p. 282). However, as Machin (2010) says, although one can "pick up almost any coaching book and it will suggest the value of the relationship....there are few research

studies within the coaching field exploring this relationship in any depth" (p. 37). Visser (2010) also claims that although "the strength and the nature of the relationship between coaches and executives appear as a critical success factor in coaching outcomes" there is little research into how this works. Baron & Morin (2009) propose that, although more studies now demonstrate the importance of the relationship, the particular determinants of the relationship are relatively unresearched. O'Broin & Palmer (2010) agree that although the literature "has repeatedly attested to the importance of the coaching relationship for over a decade" (p. 124), little is available regarding qualities influencing its formation. They identify three themes or components; bond and engagement, (including trust); coach attitudes and characteristics; collaboration. This reflects Peterson (2009) & Machin (2010), the latter of whom suggests that trust enables a level of psychological depth and challenge by the coach. Gyllensten & Palmer (2007) also suggest that the relationship, whilst necessary, is not sufficient. This is reprised in De Haan *et al.* (2011) who conclude that successful coaching comprises empathy, the relationship *and* the ability to use tools and techniques appropriately.

The absence of research-based data suggests that the use of psychometrics in coaching should be explored further through empirical study, particularly looking at how both coaches and coachees experience such tools, and how they are seen to affect the relationship. McDowall & Smewing (2009) suggest that "We do not know how many practitioners use psychometrics in this context ; neither do we know for what purpose" (p. 98). The literature review shows that little is known about the coach and coachees' subjective experience of their use. It also reveals that the relationship is the single most important aspect of any coaching encounter, the quality of which is determined by a number of coach characteristics including trust and competence. Additionally, whilst the relationship is necessary, it is not sufficient; there is an expectation that coaches are knowledgeable and able to utilise tools and techniques as appropriate. However, what happens to the relationship when such tools are introduced is not documented.

Methodology

Silverman (2010) reminds us that choosing our methodology should be driven by the research question and one's own epistemology. "Everything depends on what you are trying to find out. No research method, quantitative or qualitative is intrinsically better than any other" (p. 10). A positivist approach and quantitative methods would have been inadequate for this study as the research paradigm is interpretivist and the research question seeks to elucidate phenomenological experiences. I considered several phenomenological approaches, but rejected these in favour of interpretative phenomenological analysis (IPA).

IPA is "a qualitative research approach committed to the examination of how people make sense of their...life experiences" (Smith *et al*. 2009. p.1). Developed to allow an almost surgical exploration of idiographic, subjective experience, it is inductive, not deductive and *interpretative* rather than purely descriptive. Language, image and metaphor are significant within the approach and subject to interpretation. IPA's theoretical underpinnings stem from Husserl's phenomenology (Husserl, 1970), from hermeneutics (the theory of interpretation), and from symbolic-interactionism, which suggests that the meanings individuals give to events are of central concern but are only accessible through interpretative processes. IPA assumes that researchers are interested in exploring the respondent's psychological world through the interpretative and collaborative nature of the IPA interview and data analysis (Smith & Osborn, 2008). Unlike other branches of phenomenology IPA *explicitly states* that researchers' sustained engagement with participants' transcribed text is and *has* to be interpretative.

IPA is phenomenological in that it seeks an insider perspective on the lived experiences of individuals and interpretative in that it acknowledges the researcher's personal beliefs and standpoint and embraces the view that understanding requires interpretation.
 (Fade, 2004, p. 648)

Participants are interviewed because of their direct experience in the phenomenon concerned, offering their thoughts and feelings, telling their own stories in as much detail as possible. The researcher analyses this complex interview data rigorously and systematically. This analysis relies on the "double hermeneutic process" of people making sense of the world and their experiences, firstly for the participant, and secondly for the analyst. Arguably, the reader creates a third hermeneutic. Interpreted reports retain detailed idiographic data whilst attempting to identify what is shared by all the participants. Sample sizes are small; breadth is sacrificed for depth.

Respondents/Sample

I adopted a convenience, purposive sampling strategy to recruit three coaches and three coachees. The coaches needed two years experience of coaching within which they had regularly used psychometrics. The *coachees* needed to have experienced coaching into which psychometrics had been introduced. Six external coaches recruited for my workplace leadership programme met the coaches' criteria and nine members of staff met the coachees' criteria. All were invited to participate. The final participants comprised three female coaches aged 43, 55 and 60, each with over four years' coaching experience. The coachees included two males (32 and 52) and one female (44), all of whom had recently experienced coaching which drew upon a psychometric.

Data collection and processing

IPA is "characterised by...common processes and principles...applied flexibly" (Smith *et al.* 2009. p. 79). Although various ways of approaching analysis and interpretation are encouraged, I followed the steps suggested in Smith *et al.* (2009) as I found them helpful in adopting IPA for the first time.

According to Smith & Osborn (2008), the semi-structured interview with small, homogeneous samples is the "exemplary method for IPA" (p. 57).   Interviews must be recorded to allow the detailed verbatim transcript analysis characteristic of the approach. During March/April 2011, semi-structured interviews of 1.5 hours with each participant were digitally recorded, transcribed verbatim, and then processed following Smith *et al.* (2009). Through extensive analysis of emergent themes, theme clusters and patterns, five "super-ordinate" themes (SOTs) common to all participants surfaced.

Findings

The "super-ordinate" themes included:

Insight into self and others

The coach's significance

The coachee's significance

The instrument's significance

The effect on the conversation and relationship

Insight into self and others

The coaches felt that psychometrics promoted their coachees' self-awareness, helping them understand and appreciate their behaviour, particularly where it appeared irrational. The *coachees* echoed this; more specifically, using psychometrics had highlighted connections between their thoughts, feelings and behaviour.

> *...it helped explain why I was thinking about things in a certain way, helped to look at them from a different perspective. (Coachee2)*

They suggested that psychometrics had helped generate a sense of individual authenticity by allowing them to bring their whole self to the coaching. The instruments had facilitated self-acceptance, enabling them to feel comfortable about their feelings and identifying strengths as well as areas for change. However, they all said that improved self-understanding was not an excuse to ignore problematic behaviour. On the contrary, the process of becoming self-aware implied a responsibility to take action, characterised as "whilst I accept this is *who* I am, I will commit to changing my behaviour where it is not serving me or others well". This was important because all six participants highlighted that psychometrics sometimes revealed difficult truths about the coachee; the coachees *themselves* reported having occasionally felt very uncomfortable as a result. Sometimes, material exposed was disturbing, revealing things that the coachees disliked about themselves or about which they had been unaware. However, all said that this was a necessary and valuable part of the process, generating greater learning and development.

> *It makes for a less comfortable experience from time to time… but...that's true of any session of...value. It takes you out of your comfort zone (Coachee3)*

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The coaches and the coachees said that psychometrics had also helped the coachees develop insight into *others*, illuminating communication and relationship difficulties. Coachees 2 and 3 in particular were enabled to consider issues that they would not have otherwise.

Most strikingly, all the participants said that the experience of using psychometrics in coaching could be life-changing for the coachee because of insights generated regarding themselves and others.

> *...they have been life changing for me... sounds awfully dramatic, doesn't it? (Coachee1)*

The coach's significance

All three coachees felt that coaches should possess certain characteristics, as theirs had. The coach's capacity to build a trusting relationship was crucial, their personality relevant. More specifically, they felt that the personality of the coach as *revealed by the psychometric used within their own coaching* was relevant. They believed that, within an effective, egalitarian relationship, coaches should disclose their own psychological profile to model and facilitate sharing. Two of the coachees' coaches *did* share their MBTI profile, using it for examples within sessions. These coachees experienced this as fundamental in helping the relationship develop. For them, if the coach had not disclosed their profile, it would have been a serious block to the development of trust within the relationship and the progression of the coaching. Coach1 agreed with the coachees' position and regularly disclosed aspects of her own personality as revealed by the MBTI.

Beyond the coach's relationship-building ability, their training, qualifications, experience and skill were also important to the coachees. Their coaches had appeared comfortable with the tools they used and they saw them as "experts". Nevertheless, whilst this had contributed to their perception of a power differential within the relationship, they considered this normal. It had not adversely affected their experience.

The coaches also felt that qualifications were important, but they all said that it was their capacity to build relationships which mattered most. However, Coach2 felt that using psychometrics enhanced her credibility, particularly prior to coaching engagements and reflected well on the coaching profession. Those commissioning coaching want qualified, competent coaches; using psychometrics could be seen as relevant evidence. Coach2 did acknowledge that some coaches might use psychometrics to make themselves appear more erudite and even indispensable, the person who gave the coachee all that useful information about themselves.

> *I'm conscious of this..."ta-da!!" ...element in which we are saying "there you go, this explains everything, isn't it fabulous...you couldn't have got it without me".*

The coachee's significance
All those interviewed felt that particular characteristics of each coachee determined to what extent psychometrics were helpful as well as affecting coaching success more generally.

The coachees felt they engaged fully with the psychometric, demonstrating curiosity about themselves and others. They were prepared to look at material of a personal nature or undesirable aspects of their behaviour revealed by the instrument, moving from their comfort zone to face difficult, uncomfortable truths about themselves.

> *...that's the point, isn't it? To...discover things you wouldn't have...if you hadn't gone for the coaching. (Coachee3)*

The *coaches* all reported that psychometrics were helpful where coachees were curious about themselves and others, committed to the coaching, prepared to follow the instrument and to take responsibility for change. Whilst they had all worked with coachees who had refused to complete a psychometric, they had all encountered more coachees who *were* willing to engage with the instruments and consider what they revealed.

The psychometric's significance
All participants emphasised that it was important for *any* tool to be used properly, particularly for adequate feedback sessions allowing coachee self-assessment to be offered. All the coaches had encountered coachees with previous exposure to psychometrics where this had not been the case. The coachees echoed this, suggesting it was essential for coaches to hold thorough feedback sessions allowing coachees self-assessment.

All participants discussed how psychometrics had been introduced into the coaching. Choice was mentioned from two perspectives; whether both coach and coachee had a choice about using a psychometric at all and the freedom of either party to choose between particular instruments. For the coachees, the instruments were suggested by their coaches with whom they were already working. For Coachee1, this related to specific issues that arose within the coaching that his coach felt could be illuminated by certain instruments. Coachee 3 and Coachee 2 had already completed the MBTI in

exercises unrelated to and prior to their coaching. In both cases, their coaches suggested revisiting the instrument to illuminate issues emerging through the coaching. All three coachees attributed their willingness to use psychometrics to their well-established relationship with their coach. They would not have embraced them in a new coaching relationship where trust had yet to be built and would have resisted any attempt to impose them, especially given the direction that the instruments had taken their conversations. For all three, the most important thing above *any* tool was the conversation and the quality of the relationship. All three coachees had experienced more than one coaching contract and more than one psychometric and were unanimous that it was the particular combination of coach and instrument that had helped. Coachee 1 had used two instruments successfully with the same coach and felt that the choice of tool and the value it brought depended on the issue.

The coaches said they usually introduced psychometrics at the start of coaching engagements, either following a diagnostic suggesting the tool would be useful OR as the diagnostic itself. Coach3 sometimes introduced additional tools later, where appropriate and always with the coachee's agreement. Whilst the coaches felt that, in principle, psychometrics should be used in agreement with the coachee, all three, including Coach3, acknowledged that they always intended to use some kind of instrument.

> *I rarely coach without an accompanying psychometric, usually run alongside 360° feedback. I am quite a believer in tools ...(Coach3)*

However, they all emphasised that they never pressurised anyone to use a psychometric, even though they were disappointed when a coachee refused to do so. The psychometric was a way in to the discussion and not an end in itself

Effect on the conversation/relationship

For the coaches, the psychometrics provided a framework, helping them structure the coaching, particularly at the start. Coach3 and Coach2 used the tools to help determine how to be most effective with coachees. Coach3 reported that they enabled her to be client-centred, to demonstrate thoroughness and offer something tangible to those favouring an "evidence-based" approach. For Coach1, the tools made a valuable contribution to relationship building by revealing a great deal to the coachee about themselves *and* the coach.

The *coachees* also felt that psychometrics were helpful as a framework for the coaching. Coachee2 said that the instrument had significantly affected the way his coach had approached their work together. Once introduced, it appeared to help the relationship develop further, although the quality of the relationship and their trust in their coach allowed the psychometric to be used *in the first place.*

All three coachees reported that psychometrics had accelerated their coaching, allowing a quicker exploration of material than would otherwise have been possible, leading to efficient and productive sessions. The psychometric also took the conversation to a deeper level, helping the coaching to progress and facilitating the relationship. Discussions became more intimate, allowing the exploration of sensitive and sometimes difficult material in a non-judgemental way, sometimes extending beyond work matters. This had further deepened the relationship, leading to powerful revelations and exchanges. The coachees recognised that their coaches had been very skilled, perhaps psychotherapeutically trained. Trust levels had been very high and the coach had needed to enable the coachee to feel safe to explore what the instrument revealed

> *..it is a way of accelerating and moving into greater depth but...the coach is keeping it safe for you (Coach1)*

The three coaches also reported that introducing psychometrics had taken their coachees' issues to a different level, helping them access material that might not have been possible without the instruments *in the time available*. However, whilst Coach1 and Coach3 had also found that psychometrics *accelerated* the process, for Coach2, this was not the case. For her, the "real" conversation was delayed by the tools, particularly those that cannot be debriefed quickly or easily, or which rely heavily on the coach's knowledge.

Discussion

Some findings are unsurprising, warranting little discussion. For example, one powerful theme was that psychometrics had offered the coachees self-insight. This is consistent with the extant literature (Harper, 2008; Bluckert 2006). What is more interesting is that the *degree* of insight almost certainly related more to the coachees as *individuals* than it did to the psychometrics, particularly the extent to which they were willing to engage with the tool. Similarly, it is unsurprising that psychometrics provide a framework to help "scaffold the coaching" (Beddoes-Jones & Miller, 2007, p.60). This is a well documented and commonly stated intention. (McDowall & Smewing, 2009; McDowall & Kurz, 2007) What is more remarkable is that the tools affected the *depth* at which coach and coachees worked, the *nature* of the discussion and that they *differentially* affected the speed with which issues were accessed.

The next sections highlight elements I consider interesting, novel, or potentially controversial.

Psychometrics affect the conversation

A particularly memorable aspect of this study is that each participant described their experience of psychometrics in coaching as "life-changing". The psychometric was reported to *significantly* affect how the coaching developed. The coaches used what *they believed* the psychometrics revealed about their coachees to help determine the way they worked together as well as to help structure the coaching. The coachees confirmed the use of the instruments in this way. These are all strategies documented in the literature where concern is also expressed regarding the risk of coachees' behaviour being stereotyped (Harper, 2008). There is also the potential to focus on the aspects measured by the instrument to the detriment of the coachee's development (Mansi, 2007). In my view, whilst it *can* be helpful to use psychometrics as a framework, it is naive and potentially dangerous to use the results of any instrument without checking their accuracy with the person in question. Whilst Mansi (2007) suggests that the outcomes of self-report instruments are less likely to be challenged, sometimes coachees *do* disagree with aspects of their results which are affected by many factors. Every participant in this study recommended adequate debriefs and self-assessment, but this is usually determined by coaches and sometimes does not happen. Coaches introducing psychometrics must ensure that they balance any enthusiasm with a healthy scepticism of the psychometric's value. Cautiousness regarding prolific instrument use (Rogers, 2008; Bluckert, 2006), acknowledgement of what the instruments omit and above all, prioritisation of the relationship are critical (Kauffman, 2010; O'Brion & Palmer, 2010; de Haan & Sills 2010). Further research is needed with a larger sample, to evaluate whether adapting the coach's approach based on psychometric results assists or impedes successful coaching.

All the respondents reported that introducing a psychometric affected the speed at which issues surfaced, impacting the progress of the work. In the literature reviewed, the use of psychometrics is often mentioned as a shortcut (Rogers, 2008) or an accelerant (Pritchard, 2009; Scoular, 2007). However, in this study, whilst all the coachees and two of the coaches said the coaching was *accelerated*, for Coach2, this was *not* the case. This suggests that instruments used to facilitate a short term intervention can actually slow it down. Although this is not *explicitly* reported in the literature, it is *implied* by the fact that some instruments are characterised as complex and difficult for coachees to get to grips with (Passmore, 2008). It also suggests that the effect of psychometrics may vary significantly according to coach, coachee and instrument. Certainly, McDowall & Kurz (2007) advise that the volume of information offered by certain psychometrics can be overwhelming and potentially deterring for some coachees.

The coaches and coachees revealed that psychometrics took the conversation to a deeper level. The discussion became more personal, arguably more psychodynamic, touching on aspects of the coachees' lives that they would not have looked at without the instrument. Whilst this is not necessarily surprising, it *is* really important. The findings of this study do not suggest that conversations are *inevitably* affected in this way, or that these effects are known across the profession. However, if it is even *possible* that psychometrics generate the experiences reported here, a number of questions arise. If these effects are common, should coaches use psychometrics where neither the contract nor the presenting issues suggest the need to work at this depth or to consider personal matters? How does working in this way help coachees meet their goals and objectives or contribute to the coaching outcomes? This is particularly relevant where coaches' use of psychometrics is routine, rather than informed by the coachees' agenda. Since most coaching occurs in the workplace, it is debatable whether coach and coachee should be talking at this level, or about personal matters. In organisational settings, once the conversation becomes deeper or more personal, it has potentially moved beyond the agreed contract. Even if this kind of discussion can be accommodated within the contract, questions regarding coach competence, support, supervision and training arise, particularly whether coaches should be psychotherapeutically trained. This is explored later.

All the respondents said that tools enable coaches to identify aspects of their coachees' behaviour that might not serve them well, helping coaches and coachees *together* to consider what needs addressing within the coaching in a non-judgemental way. However, all the participants said that the experience had been uncomfortable, even painful at times for the coachee. The instruments operated like a candid mirror in which they could take a look at themselves, in some cases for the first time. This theme of difficulty and discomfort warranted a further literature search because it had not previously emerged. The literature suggests that discomfort in coaching is often about change, more specifically resistance to change (Peltier, 2001; Heron, 2001). All change involves loss, including relinquishing habits or behaviours which once served the coachee well. Resistance or avoidance is the response to the psychological, emotional and physical disturbance created by a state of transition. In addition, change in one area may generate other, unanticipated changes which cause further "disorienting dilemmas" (Mezirow, 1991). If all coaching concerns change then psychometrics are about pinpointing *specific* changes required (McCormick & Burch, 2008). Given what is known about change and resistance, discomfort on the part of our coachees might be expected.

However, whilst I agree that coaching is about change, it is not necessarily the change *per se* that generates the coachees' discomfort. I would say that, for these coachees, it almost certainly worked the other way round; the discomfort generated the change. Also, the discomfort may not manifest as resistance. None of the coachees interviewed indicated that they rejected the results that

generated their discomfort. Mansi (2007) suggests that psychometrics are subject to less resistance because they are qualitatively different from feedback gathered in other ways. However, in *this* study, the coachees' acceptance of feedback *and its associated discomfort* seemed less about the instruments and more about the fact that they trusted their *coaches* to help them handle their insights. Managing their discomfort depended heavily on the relationship. In addition, it cannot be assumed that the discomfort was *entirely* about the identification of "defects" (McCormick & Burch, 2008) nor that these were the *sole* focus for change. Some (Kauffman, 2010; Linley *et al.*, 2009) argue that coaching should help identify and build clients' strengths, highlighting mechanisms through which these can be optimised. Two coachees mentioned that *one* of the tools used did identify strengths as well as development areas. Interestingly, one study involving a strengths-based psychometric reveals that coachees can feel less comfortable considering their strengths than their weaknesses (Clifford, 2011).

This study suggests that, if psychometrics are used within coaching, they may highlight information that precipitates coachees' discomfort. If coachees are open to what is revealed, the "disorientating dilemma" (Mezirow, 1991) surfaces, is acknowledged and in turn precipitates change. If not, the discomfort is resisted. Whilst the latter was not the case for the *coachees* in this study, primarily because of their coaching relationships, the coaches *did* report examples of coachees who had rejected the opportunity that the discomfort appeared to present. This suggests that, whilst precipitating discomfort *may* be helpful, alternative perspectives must be entertained, not least because of the potential effect on the coaching relationship. From the three coach accounts, it is possible to infer that some of their relationships had been adversely affected by discomfort generated by psychometrics.

The Relationship
Whilst these participants felt that psychometrics affect the relationship in various ways, a powerful message emerged about how *critical* that relationship is, far outweighing other considerations, including psychometrics, training or qualifications, supporting the view that ..."the coaching relationship is the crucial predictor of coaching outcome" (O'Broin & Palmer, 2010, p.125).

The coachees interviewed were already working with their coach before the psychometrics were introduced. They trusted their coaches *first,* allowing the use of instruments which had subsequently helped the relationship develop further. They were only able to experience the ensuing discomfort and to view it positively because of the pre-existing relationship with their coach. The relationship came first. The rest would not have happened without it. This is a significant finding for the profession.

The coaches, however, all reported coaching engagements with coachees previously unknown to them where psychometrics were introduced. They were clear about the psychometrics' contribution to the development of the coaching relationship *from scratch*, especially in terms of promoting trust. This is important for practice because the coaches were discussing their experience with a significant number of coachees from different contexts. Nevertheless, they also described situations where coachees had refused to complete a psychometric, rejected its results or found it unhelpful. Unfortunately, it is unclear whether *these* coachees were already in a relationship with the coaches or if they were previously unknown to them. If they *were* unknown, this might suggest that the instrument was introduced too early, before the trust described as essential by the coachees in this study had been established. If they were already in a relationship, it is interesting that this was not enough to allow psychometrics to be successfully used.

There is clearly a connection between the coach/coachee relationship and the use of psychometrics. However, it is impossible to say conclusively in which direction this operates. For the coachees, the relationship came first. For the coaches, it was less clear cut. Existing literature sheds no light on this particular finding. However, it *does* highlight the importance of the relationship and the coach's skill where a psychometric is used, (McDowall & Kurz, 2007; Kauffman, 2010) particularly with some instruments (Champion & Harris, 2010). The coachees in this study re-confirmed previous research about the criticality of the relationship. They also felt that the relationship was even more important where psychometrics were introduced.

Coach training and qualifications

All the participants felt that credentials such as training, qualifications and experience were important. However, the use of psychometrics was seen by the *coachees* as particularly sensitive, suggesting additional training requirements. They suggested that, if coaches use psychometrics knowing that they may affect the relationship, they should approach this with the gravity appropriate to something that "can be life changing". In addition, if coaches use them knowing that the discussion changes, (usually) moving more quickly, becoming deeper or more personal, this has *significant* implications for their development and qualifications. It also highlights the place of supervision, integral to other helping relationships. The ongoing debate in the literature around coach training is already extensive, and includes whether coaches should be qualified beyond coaching, e.g as therapists, counsellors or psychologists. Literature addressing the need to work flexibly at the boundary between coaching and therapy suggests that since coaches inevitably work with "psychological material", they need to be better prepared (Maxwell, 2009; Price, 2009; Griffiths & Campbell, 2008; Buckley, 2007; Popovic & Boniwell, 2007; Simons, 2006). Bachkirova & Cox (2005) argue that coaches often work with psychological blocks, challenging the idea that coaches work only to improve the pre-existing, positive aspects of their clients. The development of 'psychological mindedness' (Bluckert, 2006; Lee, 2003) reflects the capacity to think about cognitive and emotional states underlying behaviour. The required coach self-awareness would necessitate different, more rigorous training than is currently automatically the case. As with therapy, regular supervision is necessary for safe practice. Lee (2003) claims that "If coaching is to release the vitality of authenticity, it must engage with personal history and the unconscious" (p. 44). Others have claimed the opposite (Berglas, 2002). However, since the unconscious may appear unexpectedly, and this may be more likely when using psychometrics, it is certainly preferable to prepare coaches for this possibility (Kilburg, 2004). Joseph's (2005) contribution to this debate as a person-centred coaching psychologist seems particularly apposite.

> ...the alleviation of psychopathology and the facilitation of optimal functioning is a unitary task...coaching psychology would be the same activity requiring the same knowledge base and...skills required for working with distress. (p. 4)

The implications are that, whilst coaches may not need psychotherapeutic training, they *do* need to work safely and knowledgeably with psychological material raised through the coaching. This suggests they should be psychologically skilled and well informed and that coach training may need to accommodate this more routinely in future. Perhaps this is particularly the case where psychometrics are to be used. Supervision emerges as essential and invaluable.

Limitations of the study

All three coachees spoke positively about their experience of psychometrics, including the discomfort precipitated by the instruments. The coaches, however, mentioned coachees who had not felt the same. It is perhaps a limitation of this study that I did not actively seek to include coachees whose experience had not been positive. Also, the coachees in the study all discussed coaching that had ended. Had the research taken place during the coaching, when the discomfort was emerging, their feedback may have been different. Future studies could include coachees at different stages in their engagements. In addition, all the coachees interviewed were already in coaching relationships when psychometrics were introduced. It may be helpful in future to seek participants for whom this was not the case.

Summary

The results show that the *experience* of using psychometrics can be transformative. All the participants said that the psychometric facilitated coachees' self-awareness and insight, helping them understand others, particularly through their inter-personal relationships. They all reported it affecting the way the coach and coachee worked together, offering a framework for the coaching and impacting the relationship and the conversation. The coaches used psychometrics to help determine how to work with individuals and in some cases, the coachees were aware of this. The tools were reported to affect the speed that issues were accessed, the depth and level at which coach and coachee worked and the nature of the issues discussed. Sensitive, personal and difficult matters exposed specifically by the psychometric were surfaced and considered as part of the coaching. The quality of the *relationship* and the trust between coach and coachee emerged as critical to the coaching's success. Moreover, for the coachees these were pre-requisites to the introduction of the psychometric. All those interviewed stated that particular aspects of individual coaches and coachees influenced the way in which psychometrics were experienced. The coach was significant in terms of their role as "expert", their competence, knowledge, skills, training, qualifications, experience and their relationship-building capacity. The coaches' use of self within the sessions was reported as critical to the development of the relationship. Most significantly, for the coachees, the disclosure of the coach's own profile as revealed by the instrument in question was seen as essential to the development of a trusting, egalitarian relationship, affecting their experience of the psychometric. The coachees' expectations of coaching and their perceptions of the psychometric influenced their commitment to engage with both. Their own curiosity about themselves and others was particularly relevant as was their willingness to go where the instrument took the conversation. Finally, those interviewed commented on the significance of the tools themselves. Some instruments were reported to enhance the coaching more than others.

Conclusion

This study raises a number of important issues with considerable implications for practice. Firstly, there is already evidence that the relationship is the most important element in coaching. This study not only re-confirms this, but suggests that it may be even more important where psychometrics are used. It may also suggest that psychometrics should not be introduced into a new coaching relationship and would be most beneficial once trust has been established. This would depart from current practice where psychometrics are commonly used for initial assessment. The second issue is whether it is appropriate to introduce a psychometric in a coaching engagement focused on work-

related goals, when that instrument may potentially affect the conversation in the way described in this study. Psychometrics could be contra-indicated in some such contracts. The third related issue is that, if coaches intend to use psychometrics when the instruments are reported to have the effects described in this study, they need to ensure that they are adequately equipped to handle what might emerge. This has *significant* implications for coach training, qualifications, supervision and for the psychometrics industry.

The growing need for coaches to develop "psychological mindedness" is already documented in the literature, even without considering the impact of psychometrics. In a profession which remains largely unregulated it is difficult for those seeking coaching to source appropriately experienced and qualified coaches without personal recommendation. The potentially "life-changing" nature of the coaching experience where a psychometric is used suggests the need to exercise even more discretion when selecting a coach. The results of this study suggest that, as a minimum, the profession needs to urgently consider the following: -

- What qualifications and/or training should coaches have as a minimum?
- What would constitute an appropriate level of "psychological awareness" within that training?
- When qualifying in psychometrics, what additional training should be *routinely* demanded for those intending to use the instruments in coaching?

Most coach training incorporates an introduction to psychometrics and their use in coaching. In order to purchase/administer psychometrics, qualification in each instrument is required. However, for some psychometrics, this seems quite superficial. Additionally, although most psychometric providers offer courses specifically on using psychometrics in *coaching*, these appear to assume a particular level of coaching competence and prior experience in attendees. Moreover, coach training and psychometric training remains quite separate. A clearer interface between these two provisions might ameliorate the situation, enhancing the experience of the coaching encounter and protecting those involved.

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