PROFESSIONAL CHRISTIAN COACHING TODAY

Chris McCluskey & Kim Avery

The podcast dedicated to Raising the Standard of Coaching…

and Changing the World

Episode 064

Leadership Coaching or Consulting -- What's the Difference?

CHRIS: Leadership coaching or consulting, what's the difference? Well, we have an important episode for you today and that's exactly the question we're going to be addressing. Some of our listeners may recall that a couple of months ago, we had on here Cheryl Scanlan and she addressed various aspects of the rapidly exploding field of leadership coaching. At the end of that excellent podcast, we asked her if she'd be willing to come back and do kind of a part 2 for us on leadership coaching and specifically we asked if she could help us distinguish some of the finer points, more important points and some of the sticky points of leadership coaching as contrasted with consulting. That is exactly what we're bringing to you today. Kim, why don't you reintroduce Cheryl to our listeners?

KIM: Yeah. We are so glad to have you back. Cheryl. Cheryl Scanlan is an executive and leadership coach. She is a master certified coach with the International Coach Federation, the director of credentialing for Christian Coaches Network International, dean of faculty here at the Professional Christian Coaching Institute, and of course, a dear friend and colleague of both Chris and myself. It's an honor to have you back on the show, Cheryl.

CHERYL: Thank you. It's an honor to be here with both of you.

KIM: Well, you left us with a tremendous amount of information last time you were here, but I have to say, also, I had a host of questions we didn't quite get to and a lot of them are around this fine distinction between coaching and consulting. It's something that a lot of our students wrestle with, that coaches, even myself, in private practice wrestle with, and so I understand the questions but I'm not sure our listeners may even understand why this subject is so important. Could you start with that?

CHERYL: Sure. I am a purist when it comes to coaching. I chose to align myself with ICF, the International Coach Federation, Core Competencies. I believe that they are very stable. The core competencies help me to manage myself in the relationship so that I don't step over a relational boundary, professional relational boundary that I shouldn't be stepping over and so if I'm going to be a consultant, I'm a consultant. My insurance is different. My risk management is different. My fees are different. The amount of time stay awake at night is different. It's just it's a different field and so it's very important that we, as coaches, if we truly are coaches, if we're certified through some sort of certified agent or credentialing agency like ICF, CCE Global, CCNI or something like that that we would stay true to our profession and we express it as such to our clients.

CHRIS: I couldn't agree more with you. It's a very important subject and a very important distinction to make. Coming from the therapy background like both Kim and I do, we are used to there being a lot of confusion around the role of a coach as contrasted with a councilor or a therapist, and I think you coming from the business world, your background, you're seeing the same kind of importance of really drawing some clear distinctions not just kind of allowing for muddy water and sloppiness and saying, "Oh well yeah. It kind is a little bit of consulting." We can't do that with counseling or therapy. We can't say, "Oh yeah. It's kind of like that." We'd get into some really dangerous territory really quickly. So maybe expand on that. Why is there so much confusion around distinctions between leadership coaching and consulting in the business world?

CHERYL: Well Chris, first I had to work through some things for myself. I did my little chart to explain what is consulting, what is coaching, and there were a couple of places where I was noticing some differences. Operationally, consulting tends to be primarily related to a group whereas coaching is group or individual. So okay, that doesn't help me too much. Consulting is more a solution based service. Coaching is more process based service. That starts to help me a little bit more. Consulting has a technical expertise, a knowledge focus whereas coaching is a listening expertise and it's behavioral focused. Consulting is problem focus, coaching is client focus. Consulting is more research oriented, coaching is more client information oriented. So I was starting to see some distinctions but I was still experiencing some confusion because of things like this. In Peter Block's book, Flawless Consulting, he defines consulting like this, you are a consultant anytime you are trying to change or improve a situation but have no direct control over the implementation. Well, that fits coaching too. So from Peter's definition in that book, coaches are consultants as well.

Laura Lorber in Executive Coaching - Worth the Money published in Wall Street Journal in 2008, she defines business coaching as an alternative term for consulting as research shows many business coaches refer to themselves as consultants, a broader business relationship than one which exclusively involves coaching. So there is more confusion because now, we're blending those two terms in a singular definition. Sherpa kind of follows Laura's definition by saying business coaching focuses on strategy and tactics while leadership coaching focuses on business behaviors. So now, we're seeing that word "business coaching" which can almost be interchanged with business consulting.

CHRIS: Let me just step in to say that this is exactly the kind of muddiness that we found in the early years of life coaching when it was coming out of a lot of counselors or therapists turned coach that you started trying to distinguish out, well now are you playing this role or that role? The answer was just yes. Sorry, that's not helpful. We can't be wearing both hats at the same time if it is, in fact, a distinct profession and we firmly believe that it definitely needs to be. You are giving the same point here. We need to make sharp distinctions but I think it's good that you're really illustrating here there is a great deal of confusion right now still in lots of places, including literature, highly respected published places that are anything but clear as to these distinctions. Go ahead, help us to get those distinctions.

CHERYL: Alright. I think in the simplest terms, let me bottom line it for you this way. Even if you move so far as to make a recommendation, you stop short of identifying or saying that you're going to see a certain outcome. You don't ever as a coach say, "If you do this, then this will happen" because at that point, your clearly in the consulting realm of things.

KIM: If I can just reframe that for a second, what you're saying is there's gray area and there are still areas for discussion and debate. I know you're going to bring some further clarity to that in a minute and I'm so glad, but if we're going to not miss anything, don't miss this fine line. When you put your toe over the line and you say, "If you did this recommended behavior, you're going to get this outcome." We have switched clearly from coaching to consulting.

CHERYL: That is correct and we're doing the consulting profession a disservice because we have to ask ourselves, do I really have that much knowledge and expertise and research to make a claim such as that? These consultants are paid top dollar to risk themselves and their reputation in making those recommendations and remember my earlier conversation about technical expertise and research expertise that they bring that we don't have. We're experts at listening and asking questions. We're not focused on the problem solving. That's where we leave it to the client.

KIM: It's an interesting distinction you're making, but the question that still brings up for me, Cheryl, is the fact that many of coaches including those of us here on the call today – Chris, yourself, and myself – we do have knowledge in specialized areas. It's not that we're not subject matter experts, it's that we've chosen instead to practice as a coach instead of consultant and sometimes I think that's where it gets difficult because I do know a lot about the subject that the client is bringing up. There's this almost danger zone for me. There's this temptation to step into my knowledge base instead of to step into the process that I know works. I think you're going to help our listeners with a grid so that we know how to manage that kind of tension.

CHERYL: Yes. I appreciate you bringing that up, Kim, and it's not just us that have the tension. It's our clients that have the tension. Every quarter, I will have a review with my clients and ask what's working, what do we want to change, and I specifically remember about a year ago, one client I've been working with for four years helping him build his business which is going very well right now, he said, "I want you to become more of a consultant. I hear you're holding back and those times when you share things with me, those resources are so valuable and I want you to do more of that." There I am.

KIM: And?

CHERYL: So this is what I do in my coaching practice. I call it setting the stage for a consulting moment. Even with this client who has asked for me to bring in more of that consulting hat, I still stay a coach. My language is typically something like this. "For just a moment, I'm not your adviser. I'm a thinking partner. I'm going to draw from my experiences from the past without making a recommendation but for the purpose of soliciting more ideas from you. Would you be interested in that process? Clients do love that but I never give an outcome. I never make a final recommendation. All I'm doing for them is giving them choices. I'm trying to open up their creative bucket so they can see what they can bring to the table.

CHRIS: Alright and so at this point, I think it's important to take a deep dive on why. Why does a coach want to be so almost seemingly obsessive about making sure you're in the coach role instead of the consulting? If the guy wants you to be a consultant and you've got some expertise, what's the big deal? Just bring it, deliver it. I would say, "Oh my goodness, it's the same kind of concern with regard to overselling what you actually have to offer, what you can actually deliver on, what you could offer any kind of assurance to the client about just like if we were to hold ourselves out as their coach and providing psychotherapy kinds of services. Here is what I mean to our listeners. If you are a coach and you are working with a person in a state of brokenness and you are operating as their counselor or therapist, heaven forbid something horrible happens. The person harms themselves or somebody else.

Now, loved ones and family members are saying, "Well goodness gracious. Shouldn't that telephone counselor coach type person, shouldn't they have picked up on this?" Whoops, wait a minute. I'm not their therapist. I was their coach. That's the paper work that was signed. That's the professional agreement that we have. I don't even reside in their state. I might not even reside in their country. I'm working across telephone lines. I didn't have visual contact with them. I couldn't read all the body language. Do you see why a therapist or counselor does not want to be in the position with somebody who might be a high liability risk offering them anything other than coaching, nondirective, nonadvisory, question based, exploratory coaching.

Okay, use that metaphor, that analogy there for what we're saying here about business coaching and consulting. In the consulting one, the business world, sometimes, you're working with a client who is responsible for hundreds of millions of dollars worth of business all around the world, maybe hundreds of thousands or at least many thousands of jobs. You've got all kinds of investors, stuff that causes stuff on Wall Street to go not happy ways and you are their coach. That's what your paperwork says. That's what the arrangement is. That's the liability that you're holding yourself out for to what, Cheryl, you meant at the beginning when you were talking about why you stay up more at night when you're a consultant than when you're a coach.

As soon as you begin connecting desired outcomes directly with the advise, the counsel, or the direction that you're giving them as their "coach" you are, as you said, you're consulting and man, if they lose their shirts financially, if that thing blows up, if a whole bunch of heads roll, people get fired, and stock values drop and all, they are going to be coming back and rightly so to that, " Oh, coach consultant whatever person that they were. Whatever they call them." Whoah! You need to have been crystal clear. Am I overstating our distinction?

CHERYL: I don't think you are at all, Chris. Where I'm sitting, I have a tremendous respect and appreciation for the consulting industry. I hired a consultant when I was at Eastern and I paid her $3,000 a month. This was 25 years ago. I paid her $3,000 a month for two 1-hour appointments and her job was to help me to make that company viable in two years. If that company was not viable in two years, I would be looking at her and saying, "Why didn't this happen?" Because I was paying her top dollar for her knowledge, her expertise, the research that she had done in business. My job was to go execute on that and I did a great job with that and we did sell the business in 1.5 years, but there was something about here that is different than what I am bringing as a coach. Whether I'm at the C level, I'm at the executive team level, I'm direct line management, a team member, it doesn't matter. It's different.

KIM: Not only is it different but I don't think it's less than because we're getting paid less and we're sleeping at night. I don't think the deliverable is less valuable. So emphasize just once again for our listeners why is coaching separate and valuable when you lay it alongside consulting.

CHERYL: Yes. When Chris was talking earlier about the telling component of this, in consulting, it's a very directive process, meaning I'm telling you what to do and in fact, they have done studies and they have found that people who are told what to do, do not hold, retain, or own that content the same way as a person who has figured it out for themselves what to do. In fact, I had a consultant who came to me and asked to work with me, highly, highly successful, and I'm wondering why she wanted to work with me. She said, "Well, I may be highly successful, but I want my clients to be highly successful and I'm recognizing that my style of telling even though I'm making great recommendations for them, a year later we're coming back around and we're looking at the exact same thing." She wants to move more into a coach approach with her business coaching. That says a lot to me.

KIM: Beautiful. Can you move us then into your grid on how coaches know when to share relevant resources and pieces of information without ever advising?

CHERYL: Yes. So there are three things that I look for. I call it the R3 and I'll break this down a little bit for you – Requested, Relevant, and Required. When the client is coming to me like my one client did and said, "I really wanted you to step into a consulting mode with me for the moment," and when I feel like there is relevant information, I have something to share that is directly connected to their agreement, meaning the work that they want to do, I haven't decided for them what that is. They have decide what that is. Finally, there is a sense by both of us, there's this perception, this one is a little harder, requires a little bit of interpretation and following that gut, but there's a sense that it is required for their success in whatever it is that they are wanting to accomplish.

I'll give you an example. I've been working with this - I'll keep using this one client - for four years. Tremendous success, doubled his business and we're trying to build some accountability for his team now. Harvard Business Review has a wonderful five-step simple process for measuring that accountability and where this all came out of initially was Lencioni's Five Dysfunctions of a Team, moving the team towards being healthy. We had the trust component, now we're working on the accountability component. You can see there are these elements of consulting where I have a knowledge base that we're drawing from to continue to build and strengthen his business. When I came in for this last team meeting, we focused on two of those five Harvard Business Review factors for accountability and success.

After I brought those in and explained them to him, that's where consulting stopped. I did not go in and say, "Owner, you have the right people but they are not in the right seat. You need to move this person over here, you need to move this person over there. Margie, you're doing a great job. You've got some skills issues here. We need to beef up your skills. You need to do more over here. Susie, you've got resource issues over here so figure out what resources you need. John, you're owning everybody's accountability so you've got to stop owning that. You've got to be more accountable to yourself." I didn't any of that. I came in with some team exercises and the team came up with far more than anything I could have come up with over that 48-hour period together. Both the owner and the key person underneath him said we've moved the dial way over.

I came in for brief consulting. It was requested that I do so, something around accountability. I had relevant information from the HBR article which was fabulous and that we both sensed that this was important for their success, but beyond that, I shifted right back into that coaching mode, asking questions, letting them figure it out for themselves. Does that help?

CHRIS: It's very good and let's just go over it again so our listeners for sure got those three Rs that she used. You're basically presenting for us, Cheryl, here a filter. When would I decide consciously to shift hats, to switch from my primary role, which is coach, to a brief period of consulting and then swap back? Well, because of these 3Rs, something is being requested of me specifically by my client. It seems to be relevant to what they are facing right now and I actually have that relevant information to provide, and it seems to me that it would be required in order for them to kind of get unstuck, to be able to make movement. I'm not doing them any favors by withholding it like it's some deep dark secret or something. So requested, relevant, and required - love those 3Rs and then you have another portion of this filter, right?

CHERYL: I do. You'll notice that those 3Rs does not include recommend. I'm not making a recommendation. I stop short of that so I will provide them with content but not move to a place that's saying, "This is what you need to do" because we have the 3Ds or D3. I call them the Dangerous Three. The first is dependency. This is where you start to pick up on the fact that the client is becoming emotionally dependent upon you. When this happens, we're in that danger zone and we want to move that client away from emotional dependency towards emotional independence from us. How we do that? One way, there are many ways to do it but one way we can do that is help the client by letting the client draw their own conclusions. We're always presenting them with a choice. The client decides. We're letting the client draw a conclusion around whatever we're working on. That helps to build that independence from us.

The second danger zone is dominance. How much talking am I doing? How much advising am I doing? Am I finding myself starting to make recommendations? Am I saying, "You need to do this or you probably want to do this?" That's a danger zone. I'm starting to dominate the conversation even if it's not with my quantity of words. It's with the language that I'm using, the request that I'm making and so to switch out of that, we ask the client for input. What are they thinking? At any moment we start to sense that dominance, we simply go back to the client and ask for their input.

The first one is dependency. We go back to the client and have them make the choices or draw conclusions. The second is dominance. We ask for their input and have them sort out the information we're giving them. They third is demand. This is one where coaches can get a little tripped up. The client is demanding that we tell them something, that we give them something, and at this point, we have to come back and clarify the coaching relationship. This is who I am and this is who I am not. For many of us, we come to coaching from speaking platforms. I mean, think about it. Kim has a podcast. You have a podcast. You're both coaches. Now all of a sudden you get into a coaching conversation. Your context with that relationship so far has been you're an expert. They are going to expect you to be an expert on the one on one. It's very important that we understand how our clients are coming to us because if they are coming to us as a result of us being on some sort of platform, we're going to need to do a little bit more work on the frontend explaining to them who we are and who we are not in the coaching relationship because I'm different. I'm not on the platform anymore. I'm not that same expert. I'm coming in as a thought partner with you to help you think things through. So 3Ds – Dependency, Dominance, and Demand from the client -that's what we really want to watch ourselves with that fine line that Kim was talking about earlier.

CHRIS: I love it. My kids are big fans of a little robot named R2D2 and here, we've got R3D3. It's easy to remember at least. I'll give those to our listeners one more time if you're trying to find a pen and scribble something down here. The 3Rs for deciding to shift into that role briefly of consultant when you're in the coaching role as your contract, the 3Rs that you have Relevant information from your background and your expertise. It's being Requested of you by your client and it seems to you that it would be Required in order to help them get unstuck and keep moving forward. The three things to watch out for then are that you don't breed Dependency. That's the first D there on our D3. You don't breed dependency in your client. They just start to come to you like you're the answer person and they are not staying very actively engaged in the discovery process and discernment process for themselves.

Secondly, you watch out that you don't begin to Dominate. So you're watching for dominance. You are sharing, you are helping to stir the pot. You are providing some ideas and some information from best practices and such in the field, but you're not dominating. The third D is their Demand. You are not giving into their demand. You're not allowing your client to control the process and determine what role you're going to play. You are still the one who is in control of honoring the contract that you have with this client, what you can provide including knowing what you cannot. I love it, Cheryl. This is gold.

CHERYL: Thank you, Chris. We talked a little bit about that directive approach in consulting and when we use direct communication, sometimes we move that dial a little bit further into telling, but direct communication is simply reflecting back to the client what you're hearing or stating as a potential fact what you're hearing them say. This is where I think we're doing our client disservice because we're so afraid of becoming directive that we're not using direct communication. Let me give you an example. A client is thinking about scheduling his family's vacation for the next year. He's also concerned a little bit about cash flow. As he's planning these vacations, it dawns on me he's about to spend an awful lot of money on these vacations at a time when he has concern about cash flow. I simply said to him, "Hmm, you're about to spend a lot of money in 2017 on vacations at a time when you have cash flow concerns." That's all I said. I didn't say it was wrong. I didn't tell him he shouldn't do it, but I consolidated about 10 minutes of his content into a very short statement so he could see it for what it was and decide what he wanted to do with that.

CHRIS: A direct statement, not a directive statement.

CHERYL: You should really consider whether or not you want to take those vacations based on your cash flow issues – directive. You're going to spend a lot of money on vacations next year at a time when you're concerned about cash flow – direct.

CHRIS: Big difference.

CHERYL: The second one is respecting the client to decide for themselves what they want to do.

CHRIS: We've covered a lot of ground today and I think this is probably one of those episodes that bares going back through now because it takes a while to wrap our brains around some things that are either very complex and therefore confusing, or very fine and subtle distinctions and therefore confusing. It's both things when we come to these distinctions. I do love, Cheryl, that you're such a good representation of what we stand for here at Professional Christian Coaching Institute and this podcast, Professional Christian Coaching Today, and that is raising the standard of professionalism. The whole field of professional grade coaching is still emerging and it is still being integrated into business settings as well as ministry settings, and certainly the field of distinctly Christian professional grade coaching is very much in the stage of emerging and so you're really helping our listeners to do that ferreting out, that distinguishing between other fields from which coaching borrows but saying, boy, when you're contracting out with a client, a corporation, ministry, denomination, or some kind of a large entity, be sure that you're clear which hat you're wearing and why and how you stay in that role then or the very few times where you choose to step out of it, know why you're stepping out of it and then step back into it. You've helped us do exactly what we're all about here. You've raised the standard for us.

CHERYL: Well, thank you, Chris. I've enjoyed it.

CHRIS: Listeners, I know that you would want to connect with Cheryl on the web and you can find a great deal of information about her simply at her primary website which is CherylScanlan.com. She has generously offered that if you email her, that would be just at Cheryl@CherylScanlan.com, she will be happy to make available to our listeners a complete transcript of a recent workshop that she did called The Fine Line between Leadership Coaching and Consulting. In other words, everything we tried to cover here in a brief format audibly, you'll be able to read through in great detail in that transcript, The Fine Line between Leadership Coaching and Consulting. All you have to do is send her an email at Cheryl@CherylScanlan.com. Thanks so much for making a resource like that available, Cheryl.

CHERYL: You're welcome, Chris.

CHRIS: While you're on the web, of course, be sure and visit us over at the school's website which is ProfessionalChristianCoaching.com. We have another offering of our foundational course in coaching called The Essentials of Leadership Coaching that starts in February of this coming year. If you want to pop out there, click on the courses tab and you will find all the information you need and be able to get registered for The Essentials of Leadership Coaching again at ProfessionalChristianCoaching.com.

Until next time, keep raising the standard of coaching and changing the world.

KIM: God's richest blessings to you.