

Shadow Coaching: Turning Development Feedback on its Head

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Stuart, a senior leader with a multi-national, strides into the conference room as usual to take his seat at the centre of the table. He is accompanied by a bright young manager whom those around the table assume to be his new “EA” (Executive Assistant). Stuart starts the meeting: “Before we begin, I would like to introduce you to the young woman on my right. She is here to keep an eye on me, so to speak. She has been with the organisation for about 5 years now and has been assigned as my Shadow Coach for the next 6 months. I’ve asked her to watch for a few things, behaviours, which I’ve been working on as part of the feedback you and a few others have given me over the years. After the meeting, she will be giving me her observations about how I did in those areas. How’s that for turning coaching on its head!”

What is commonly referred to as shadow coaching, usually involves an aspiring young hi-potential leader following a senior manager around for a few months to “learn the ropes” of the business and get tuned into the “political landscape”. A lot of exposure and learning takes place with the preponderance of it going one way, from leader to follower.

Shadow Coaching as described above, turns that process around, making the assumption that senior, experienced players can learn a great deal from a more junior, fresher pair of eyes. While using that fresh pair of eyes, the junior shadow does get most of the advantages of the traditional process. What’s been added in a very real sense is “dual development”.

This “junior to senior” approach is based on tried principles we would like to expand on in this article:

- Clear and current feedback given to us in a helpful way, about something we “choose” to work on, is both a gift and one of the most powerful development tools available
- A good design with a thoughtful structure goes a long way toward making a process work
- Development help is available to us from many directions; that includes help from those junior to us in the organisation
- The organisations, culturally and behaviourally, that most senior managers grew up in *are not* the ones they are managing today. Organisations and the make up of people in them have been and continue to go through profound and rapid change. These changed organisations are populated by staff who operate *differently* than their managers did on the way up
- The proliferation of professional coaching, while a good thing, can have an unintended effect of creating the impression that only professionals can effectively coach leaders in these challenging times

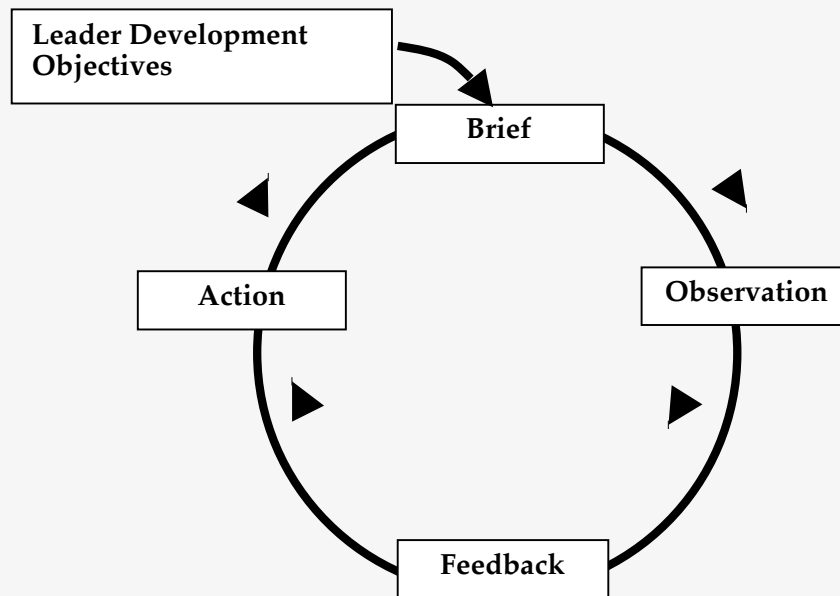
A good design goes a long way

Shadow Coaching, as employed by Shell over the past few years, is used by groups or business units working on particular behavioural agendas and aligning this with its leadership development efforts. This approach results in multiple “Shadow Coaching pairs” being set up at any one time. These pairs, in most cases, are experiencing this process for the first time. To assure some consistency of implementation and quality, it makes sense to have clear structures in place for them to follow. The set up itself, a senior manager being assigned someone junior to them as their coach, is innately uncomfortable at the beginning for both parties. That kind of discomfort calls for a clear and supportive start up structure. Structure provides

both security and a clear process for generating behavioural feedback, an area that makes most people a bit nervous. **Inset 1** describes the basic structure or “engine” of the programme.

Inset 1: B-O-F-A The Shadow Coaching Structure and Cycle

The basic engine of the process is the Brief-Observation-Feedback-Action cycle as depicted below:



Leader Development Objectives: This provides the anchor for the process. Aided by a facilitator, the leader forms a specific set of objectives he/she would like to target for the duration of the Shadow Coaching process. Without this, the process not only loses focus, but puts the Junior Shadow at risk of stepping into territory the senior leader has no interest in pursuing.

Brief: There is an old adage in feedback – “If it isn't asked for, don't give it!” The Brief addresses this issue directly, and does a few other things. At the Brief, the Leader or Client describes the context of the event to be observed, who will be there, what the agenda is and what some of the issues might be. They then let the Shadow know what they want them to look for. Again this is not what to look for in the others but in the leader and how they handle themselves, others and issues that arise. This becomes the foundation for the feedback.

Observation: This is just what it says on the tin. No more, no less. A structured tool is provided to help the Shadow organise their observations. Having this structure also helps them from getting hooked into the content and process of the meeting itself. Sitting there with a clipboard is a continuous reminder of role. A guideline is that Shadows do not participate in meetings or give overall feedback at the end. Again, this keeps the process from getting derailed.

Feedback: The feedback is provided, again according to a structure, at a closed meeting, follow shortly on the meeting or process that was observed. Fresh, live feedback about behaviour that just happened is one of the foundational rules for effective feedback, so that's just what happens.

Action: Things go a step further and identify the “what's next” through actions and ideas on how to bolster behaviour the leader desired and achieved or how to take an action to further push a behavioural shift.

Other structures in the design include:

- a brief but intensive training for Shadow Coaches to build their observation and their feedback skills and deepen their understanding of relevant and powerful behavioural mechanisms
- a 1:1 session with leaders prior to starting the process to get them to a “ready” state for the process of working in this way with a junior member of staff and to assure they have identified their areas of focus for this particular development process
- a set of tools and aids to accompany each step of the process
- a support process (identified facilitators) for both Shadow Coaches and leaders
- a collective learning process that uses a network approach to build process learning and provide the organisation with themes and general observations from the multiple meetings that are being observed in the business

Experience in Shell Malaysia, where this process is now starting its second round after a successful start, demonstrates the importance of a clear structure and a well prepared start up plan. Junior to senior feedback is a challenge in any culture. This is even truer in Asian cultures where seniority, respect, and “face” issues are paramount.

A note on matching pairs

One of the big concerns regarding this process is how to make get the right match. In general, we see the best criterion is diversity, with the exception of geographical location which can cause a challenge. Below are some diversity criteria which we have used to facilitate a good match:

- Function
- Gender
- Culture and Nationality
- Levels of separation (at least two grades if possible)

Chemistry is important but quite misleading. Firstly, you can’t really predict chemistry. As Steve Williams, Tiger Wood’s caddy at the British Open said: “For some reason, he and I just clicked, it just happened”. Secondly, if a good process and structure are followed, success is possible in spite of chemistry. In organisation life, you seldom get to pick your own work team, let alone your leader. The organisation expects you to make these relationships work.

Development help from any direction

Many of us are still wedded to the idea that those above or ahead of us in some way are best able to provide us with the help we need in our continuing growth and development. This notion takes growth and development, which is both holistic and linear, and makes it singularly linear. Once we do this we close ourselves off to a myriad of messages and insights that don’t necessarily come from “above or ahead”. Moving out of this linear framework is not easy. I can recall significant challenges in implementing “peer coaching” programmes. The idea of openly seeking or taking advice from someone in an equal position, just didn’t feel comfortable. Even more challenging, in the late 1980’s, was introducing the concept of “upward feedback”, a pre-cursor to 360 degree feedback which became popular a few years later. Upward feedback posed the idea a leader could and *should* learn from their team members not only from their boss. This sounds simple now, it wasn’t so simple then. I recall working with more than one senior manager at the time who, in preparation for this process, considered resigning rather than face comment from their immediate team on their leadership style and management effectiveness.

What we need for our development is shaped by an internal desire to learn and grow. When we have shaped our development questions, messages can come from any direction and any source. It is the questions, not the direction or source of a message that makes it relevant.

We only have to step back from the work environment to remember moments when a child, perhaps one of our children, raised a question or made an observation that stopped us in our tracks with its simple insightfulness. We take this concept and apply it to the Shadow Coaching. A fresh mind, less shaped by the system it finds itself in, not yet conditioned by the particular correctness of the corporate culture, can provide feedback and insights that are stunningly fresh and pure. As one toughened senior leader on his second career, his first as a RAF Officer, said of his first Shadow Coaching Feedback session: "That is the best 30 minutes of feedback I've had in 30 years."

In Shell Malaysia, the local team came up with the excellent analogy of the caddy and the golfer as a way of explaining this relationship. See **Inset 2**.

Inset 2: Behind Every Great Golfer...

The often unsung hero, guide, support to the professional golfer is the caddy. Like the shadow, always there, working by request, carefully attending to everything their golfer does...or might do.

There is much more to this relationship than un-socking and handing over the requested club after hauling it around the green. This was proven only too clearly when Tiger Woods, on the 17th hole of the 2006 British Open, asked his caddy, Steve Williams of New Zealand, to have a look at the lie of his ball on the green.*

Caddies know the game and get to know, or understand the player, in the context of active competition and pressure. They see the game from a different perspective and can offer the right comment at the right time. Some caddies go on to become professional golfers themselves and their participation in the game, as shadow guides at the highest levels, certainly gives them insights they couldn't get anywhere else.

* Story as told at: www.tigerwoods.com

This isn't the organisation it used to be

Organisations in terms of culture, structure, processes and staffing have changed dramatically in the past 20 years and continue to do so at a mind-numbing pace. When one of the most successful contemporary business books is titled "First, Break all the Rules", you know something is changing and changing fast.

One of the implications of this rapid change, in practical terms, is that managers and leaders are not managing the kinds of organisations or, the kind of folks they "grew up" with in the organisation. The landscape has changed while they have been on the journey. Those junior to them in age and experience understand that landscape because *they are it*. While some things like the politics of the boardroom and basic human behaviour may not have changed dramatically, the workforce, its culture, drivers, ways of performing and relating to work have.

The archetype or "the guide" is present in many settings where an individual is placed in a new context and needs to learn how to successfully navigate through it. Ironically, a senior leader who has spent 10 to 15 years getting to where he or she is finds themselves, in many cases, leading in a context that is new to them. A Shadow

Coach can serve as a guide to that new territory by helping the leader understand how they are going about relating to it and helping them self-assess how well that is working. See **Inset 3**.

Inset 3: The guide who knows the territory

The University of Chicago has a great tradition of social anthropology, particularly in contemporary settings. When the social anthropologist sets out to research a particular setting, let's say an inner-city urban community, one of the first things they look for is a guide. This isn't a research assistant who does part of the academic work and analysis but a local individual who knows the community, its culture and habits and can help the anthropologist navigate, see and understand things that only someone from that context could see. They can also help the researcher manage his or her behaviour in a way that builds relationships and opens connections and opportunities.

In a different setting, stories and movies often portray these guides as children, full of energy and not inhibited by the politics of adults. In the first of the "Road Warrior" series, starring Mel Gibson, Gibson's character is befriended by a little guide who shows him the ropes of a community of survivors. The same theme is repeated in many epics and stories involving heroes or heroines on a quest.

Growing reliance on a professional approach

Executive coaching as an industry has grown massively in both size and in professionalism. While this is a great development it should also raise a fundamental question: Why? What is going on that is causing organisations to spend billions, whether speaking dollars, euros or sterling, on professional third party coaching? We think, and this might sound a bit too obvious, that it is because people are not getting what they need *inside* the organisations. With all the conversations in the past years about building coaching cultures, coaching skills for leaders, mentoring schemes and so on, the reality seems to be that quality internal coaching and mentoring is just not that available. The result: a heavy dependence on external resources.

Scott Peck in his seminal, best seller, "A Road Less Travelled", speaks of the similar growth of professional counsellors and therapists in modern times. He attributes this to a great extent on the disappearance in modern societies what he calls "natural therapy". That natural therapy was present in family and community processes that kept us healthy, by and large, for the thousands of years before we had therapists. Similarly, organisations and their cultures have lost a great deal of the capacity to provide both junior and senior members with the natural help they need, internally, as they grow and develop in the organisation. And, something we shouldn't forget, the organisation is the primary context or vessel for our development for most of our adult life!

Through Shadow Coaching, organisations have a very powerful vehicle for building that natural source of help back into what is popularly called the "DNA" of the organisation. It does so by building the capability with junior staff to give feedback and share observations with anyone at any level in the organisation and by demonstrating the receptiveness of receiving this help by the very leaders who are the role models for that culture. These very Shadow Coaches will be leading in the future and like the aspiring caddy, both participate in and observe the workings of the game they will be playing.