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the magazine of professional coaching

Instruments in Coaching

The landscape of assessments

Coaching With
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Instruments in Coaching

The landscape of assessments

You can't know how far you've come, or how far you need to go, unless you measure along the way. Instruments today can assess the client and the coach. Instruments can assess: personality, skill level, behaviors, group dynamics, leadership ability and coaching effectiveness. Join us as we examine instruments and methods you can use to support and enhance your coaching engagements.

What are the different types of tools available and what are they used for? How do you measure the effectiveness of your coaching engagement? How, when and what do you use to engage with your client to increase self-awareness? How do they overlap? When do you use these measurement instruments?



Feature

By Terry H. Hildebrandt, PhD, PCC

There is a dizzying array of possible instruments that coaches can use to enhance client awareness and improve the coaching process. *Tests in Print VIII* along with its companion, *The Nineteenth Mental Measurements Yearbook*, contains descriptive information on approximately 3,000 testing instruments! Choosing an appropriate tool for a particular coaching engagement can be a challenge. In this article, I provide a map, based on Ken Wilber's *Integral Theory*, to better understand how to classify tools, along with helpful questions to guide you towards the right assessment to gather the critical client data you need.

Individual or Group?

The first question to consider is whether you are coaching an individual or a team. Who is being assessed? Assessments can be used in working with individuals in life coaching, leadership coaching, executive coaching, and career coaching. For individuals, you may want to explore important characteristics such as career interests, talents, character strengths, skills, values, personality, or leadership behaviors. When working with a team, you may be interested in such things as team culture, team effectiveness, conflict climate, or shared values. Coaches may also want to work with entire organizations in the areas of cultural change or employee engagement.

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Interior or Exterior?

The next question determines if you are interested in exploring the hidden, interior perspective, or are you more interested in exterior, visible behaviors? For an individual, there are great assessments that explore values, beliefs, orientations, personality preferences, needs, and interests, which are all more interior constructs. These elements are typically assessed by tools where the client answers a number of self-report questions. Others cannot directly observe these aspects of an individual since these are interior beliefs or orientations. For a group, team, or organization we can also use assessments to understand the collective interior aspects of culture, shared beliefs, and shared values.

For the exterior or behavioral perspective, we can assess an individual on leadership style, leadership competencies, social style, conflict orientation, and emotional/social intelligence to name a few. Group/team behavior can also be assessed for exterior, visible behaviors such as team effectiveness, results, structure, conflict climate, and employee engagement.

Type or Line of Development?

The third question deals with whether you are looking at different types or lines with multiple levels of development. Instruments that measure type hold the basic assump-

tion that all types are of equal value and can be described as ‘horizontal’ in nature. Each type brings its own unique strengths and weaknesses and none are inherently better or worse than another. Good examples of this include social style, psychological type (as measured by Myers-Briggs Type Indicator®, for example) and the Enneagram.

In contrast, lines of development imply that one can grow over time along that particular line and can be described as ‘vertical’ in nature. Examples of developmental lines include emotional/social intelligence, cognitive development, skills in a particular domain (such as leadership effectiveness, logic, cooking, or music), and spiritual development. Tools that measure lines tend to provide a rating score or level that determines where the client currently exists or performs on that line of development.

As you might expect, one can measure types in both individuals

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and teams, both from the interior perspective and exterior perspective. For individuals we might measure interior types such as psychological type, values type, conflict orientation, and communication style. In teams, we can measure organizational values types, organizational structure types, and cultural types.

Integral Map of Coaching Assessments				
INDIVIDUAL				
INTERIOR	TYPES	LINES	LINES	EXTERIOR
	MBTI Enneagram Values Types Interests Needs	Ego Development Spiritual Development Cognitive Development	Social Style Communication Style Conflict Style Stress Types	
INTERIOR	TYPES	LINES	LINES	EXTERIOR
	Organizational Values Orientation Organizational Archetypes & Culture	Conflict Culture Leadership Culture Organizational/Team Culture	Team Stress Behavior Type Team Communication Styles	
GROUP				

Measuring various lines of development is particularly critical in coaching both individuals and teams. One common developmental line for individuals includes leadership competencies. These are often measured using 360 feedback instruments where leaders request a number of stakeholders to rate their skill level on various leadership competencies. Over the last 10 years, social and emotional intelligence has also become a popular vertical line of development in coaching. Commercial tools exist that use both self-report questionnaires and 360 feedback to support individuals in clearly understanding skills in social and emotional intelligence. Typically, one is rated on a 1 to 5 scale on each of the competencies. In executive coaching, one can also measure executive decision-making function and logic. Researchers have also developed assessments to measure spiritual line

of development ad ego development, which can be very helpful in life coaching.

In terms of teams, you can also measure leadership culture, team effectiveness, and conflict climate. There are a number of commercially available tools that allow team members and other stakeholders to rate the team on a number of competencies that organizational researchers have determined are required for high functioning teams. These tools serve as a 360 version of team assessment. Entire organizations can also be evaluated on the effectiveness of their culture and employee engagement.

Integral Map of Coaching Assessments

The diagram above maps the assessments into categories, bringing together individual/group, interior/exterior, and type/line considerations.

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While coaches can use individual tools to assess each of these constructs, some tools conveniently will measure multiple client characteristics at once. One of my favorite commercial tools is the Birkman Method®. The Birkman will measure interests and needs (interior); and unusual behaviors and stress behaviors (exterior). Birkman can also be used with groups to understand the dominant group styles on interests, needs, usual behavior and stress.

Cost

A client's budget is a significant consideration when choosing the appropriate assessment in coaching. Instruments can range in price from free to thousands of dollars. For a low-cost option, many coaches design their own intake tools consisting of a number of self-report surveys to measure client satisfaction and behavior in a number of key areas. One very popular tool is the “Wheel of Life.” Commercial tools tend to range from as low as \$10 for simple online assessments to several hundred dollars for more complex multi-rater instruments.

Certification & Training

No matter what instrument you choose, it is important to feel confident and qualified in its use. Some commercial instruments require extensive education and training. A master's, doctorate degree, or graduate training in the use of psychological instruments is often enough to qualify a coach for many instruments. In other cases, the publisher or administrator of the tool may require multi-day spe-

cific certification training before giving you access to the instrument. One best practice is to consider partnering with other coaches who are already certified to use a particular tool. This can enable you to get the information you need without making the investment in training yourself.

Validity & Reliability

Another question of particular importance to business clients is how reliable is the tool? If I take the instrument again, will I get similar results? A related question is, does the instrument actually measure what it claims to measure? This is a concern with validity. A best practice is to ask the distributor of any instrument whether they have done the work to statistically validate the tool. For more basic tools such as intake questionnaires, consider how useful the data are to you and the client during the coaching process. You can always tweak your questions if you find that you are not getting the information you need.

Summary

Instruments can be a powerful addition to any coaching program. Choosing the right tool may require significant research, training, planning, and investment. However, you will find that assessments can provide powerful insights that can dramatically decrease the amount of time to develop client self-awareness and diagnosis of common coaching situations. You can also increase your credibility as a coach by having scientifically valid and reliable instruments in your toolbox.

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