

Managing client expectations and coaching confidentiality

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Earlier this year, a company wanted to commission me to provide Clean Language coaching to some of its directors. The board was in the forming stages and the company wanted the directors to be working together at their best.

There were some issues. In particular, one director had been described in employee reports as being difficult to work with. In the interest of confidentiality, I'll call her "Rita". After Rita was brought on board, attrition in her department jumped. Additionally, she and another director often had conflicts at the board level.

The company decided it would give Rita six months before deciding whether they would keep her on or ask her to leave. The company wanted me to coach Rita. They also wanted me to let them know what happened during my sessions with her so they could take that information into account when deciding her future in the company.

When the company asked me to do this, they had not officially notified Rita of their decision. It also didn't sound like they were planning to. I was conflicted. How could I honour coaching confidentiality and have an honest relationship with a coachee, while managing the company's expectations to be kept informed about a pending issue they needed help with?

Thankfully, I was in London with James Lawley and Penny Tompkins at that moment. The conversation we had taught me how to manage a situation like this. And it helped me to communicate clearly with the company about how to manage the situation ethically.

Since the company was far away in another country while I was in London, the most efficient option for me at that moment was e-mail.

Before coaching begins

I informed the company that before any coaching could begin, they needed to let Rita know they were evaluating her performance. They also needed to inform her that they would be giving her six months before deciding whether or not she stayed in the company, and that they were offering her confidential coaching to support her to improve her performance.

As an external coach, it was important for me to be clear with the company about that first step for three reasons. One, it wasn't my responsibility to let Rita know that the company was evaluating her performance. Two, if I was meant to keep this information confidential, it would have been unfair for me to keep a secret like that from my coachee. The third reason was that it ensured that Rita knew what was at stake. That way she could make the most out of the coaching sessions regardless of whether she stayed with the company or not.

The second thing I asked the company to do, before I began coaching Rita, was to let my coachee know what development they needed to observe that would mean they would keep her on. I also asked the company to send me a copy of what had been communicated to Rita so that as her coach, I was apprised of what they expected from her.

Thirdly, I offered to support the company if they needed help to clarify:

- What they needed to observe or have reported that would constitute evidence of change?
- How much evidence would be needed before they decided to keep her on?
- How soon would they need to see those changes? For example, would they see evidence that she was changing incrementally, or would they need her to have demonstrated a certain level by 6 months? And if she was demonstrating progress but still hadn't reached that level, would they let her go anyway?
- How would the company collect the evidence needed to decide?

I said to the company that once this was clarified, they needed to convey the information to Rita so there was transparency about what was happening. Rita could then make an informed choice about what she needed from the coaching sessions.

I explained to the company that taking all of these steps would ensure I had an honest and confidential relationship with Rita. It would also enable me to uphold my ethics as a coach and provide the best service for both my coachee and the company.

During coaching

I then informed the company about what would happen in the coaching sessions.

I would print out the company's communication to both Rita and me and have it in the room for the first session. I would begin by saying to Rita, "In light of the company's six-month assessment of your performance, what would you like to have happen in our coaching sessions?" or "What do you want to achieve from coaching in light of your company's plans?"

This would immediately address the reality of the situation. It would recognise there were two things going on: Rita's performance and the company's assessment of Rita's performance. The fact is, even if Rita's performance improved, it wouldn't make any difference unless the company's assessment of her performance also changed.

The company's perception was feedback to Rita. Whether she liked that feedback or not, or thought it fair or not, how would she respond? Given the opportunity, would she respond in a way that demonstrated behaviours that would give her company reasons to change their perception of her?

And even if Rita didn't want to keep her job, asking her "What would you like to have happen in our coaching sessions?" would allow her to consider how she wanted to develop so that she didn't find herself in a similar situation in the future.

After the first coaching session

In my e-mail to the company, I also explained that at the end of the first coaching session I would ask Rita to inform the company of her desired outcomes and plans for achieving them.

Having Rita send the company this e-mail would give her an opportunity to demonstrate to them that she was taking their assessment seriously and attending to her development as a professional.

It would also keep the company apprised of Rita's objectives and could be used as part of their measure of whether she had demonstrated enough change for them to change their perception of her.

What was achieved

Several weeks after sending the e-mail from London, I found out that Rita had left the company of her own volition. The company put on hold the coaching of the board of directors until they found Rita's replacement.

Still, the value of what I did demonstrated to the company how to manage a sticky situation ethically and professionally. I was sending an unspoken meta-message to both the company and Rita about how to act fairly when a lot is at stake for both parties.

If the company had done what I suggested in my e-mail, it would have ensured the following:

1. The coachee, Rita, could trust that whatever happened during the coaching sessions would be confidential. The only thing that wouldn't be confidential would be the goals and plans she wanted to let the company know about.
2. The company would have another, more transparent, model for handling a difficult communication with an employee.

3. The company could make their evaluation based on the performance criteria they laid down in advance.
4. Rita could trust that as her coach, I would have been working on her behalf even though I was in service to the company.
5. I wouldn't get caught in the crossfires between the company and an employee who was on notice.
6. My coaching services could not be used, inadvertently or otherwise, as grounds for dismissal.

Doing all of the above would have ensured that I was able to deliver what the company wanted and, at the same time, it would have maintained the integrity and confidentiality of the relationship with my coachee.

Finally, it would have let the company and the coachee know that it isn't a coach's job to take sides, decide who is in the right, or to assess an employee's performance. All of that would have been a win-win-win for the company, the coachee, and me.



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