CHANGE EXPLORER-GUIDELINE
CLOSING MEETING OF THE COACHING
Siegfried Greif, Ilka Seeberg and Karen Santaniello (Osnabrück 2011)

Purpose
In the closing meeting the coachee and the coach reflect the process and results of the coaching in a systematic way. Particularly, they

• Review the process and the sessions
• Evaluate goals and results of the coaching
• Provide differentiated reciprocal feedbacks that stimulate future improvements or better transfer into practice
• Agree on the communication of the results and learnings of the coaching (especially in case of failure…)
• Systematically round off the coaching and allow for a psychological disengagement.

Brief description
In the closing meeting the coachee and coach review and reflect the coaching, the initial goals, changes of the goals and goal attainment satisfaction, as well as the experiences, changes and developments of the coachee. Also, the coachee will be supported how to autonomously transfer her/his not yet realized action intentions into practice and how to communicate her/his coaching experience to other people.

Normally the method is used in the last meeting of the coaching. But it is also possible to apply it after a sequence of sessions before the real ending of the coaching. The advantage is here that the common reflections can be used for improvements of the ongoing coaching process.

Preparation of the closing meeting:
A session before the ending meeting the coach asks her/his coachee for permission to perform an evaluation interview and shortly explains the purpose, the Change Explorer method and the usefulness of a common reflection of the coaching process and its results (e.g. by using descriptions and points mentioned in this guideline or if possible her/his own experiences with the method).

To prepare individually the closing meeting, the coach is asked to reflect on the following questions:

• What went well in the coaching process from my point of view and what would I wish should have been different?
• Which concrete results of the coaching, and changes and developments of the coachee did I observe?
• What impressed me?
• What strengths the coachee showed in the coaching?
• Which subjects or problems are undealt with or open?
• What do I want to give my coachee on the road?

The coach takes short notes to answer these questions.

Self-interview with the Change Explorer Method
After this, she/he performs a self-interview with the Change Explorer Method (cf. slides and role playing in the workshop) and brings her/his notes to the closing meeting. An alternative is an interview by trained interviewers. If you need one, please write us an Email: sgreif@uos.de

Satisfaction with the coaching sessions
In addition, the coach rates her/his satisfaction with the individual coaching sessions and estimates the satisfaction ratings of the coachee. He/she prepares a table of the sessions, as shown in the following model.

**Table 1: Satisfaction with the coaching sessions**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Preliminary talk</th>
<th>Session 1</th>
<th>Session 2</th>
<th>Session 3</th>
<th>Session 4</th>
<th>Session 5</th>
<th>Session 6</th>
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</table>

Below the session number the date and notes about the subjects are added (with space for additions of the coachee). A copy of an empty table is prepared for the coachee (see below).

The coach marks two types of satisfaction ratings (pens with different colours): (1) Her/his own satisfaction ratings of the sessions and (2) expected ratings of the coachee. She/he connects the marks by lines. The table of the coach and an empty table are brought to the closing meeting.

**Start of the closing meeting:**

The coach informs the coachee about the course of the meeting and shortly repeats the purpose, method and expected usefulness for the coachee and coach:

1. Change Explorer-Interview
2. Satisfaction with the coaching sessions
3. Comparison and common reflection of the interview and satisfaction ratings
4. Open questions and problems (especially: future plans and transfer of not realized action intentions, communication of the coaching experiences and results)
5. Formal ending

The following description concentrates on the first three points, the Change Explorer-Interview, the satisfaction ratings and their comparison. For the remaining points only short notes will be given below.

**(1) Change Explorer-Interview:**

The following description is based on a short form of the Change Explorer-Interview. Originally the interview method has been applied widely as a semi-standardized qualitative instrument for the evaluation and improvement of organisational change processes (Greif & Riemenschneider, 2009; Greif, Runde, & Seeberg, 2004; Greif & Seeberg, 2007; Jacobs, Keegan, Christie-Zeyse, Seeberg, & Runde, 2006). Typically in this field the interview is performed with 5 to 30 influential key persons of all levels of the organization. The results of the interviews are commonly reflected in a workshop with all interviewees and are used as a basis for concrete improvements of the change management. The power of the instrument has been demonstrated by substantial improvements of many difficult changes or successful restarts of near failures. Lately we adapted the method for a qualitative evaluation of coaching processes and results (Greif, 2008, 2009; Greif, Runde, & Seeberg, 2005). An English publication is in preparation.
Reflection on the success of the coaching

(It is important to express interest and openness to all ratings, comments and explanations of the coachee, especially if they show negative evaluations of the coaching! Optimal is a reflection from a common meta-level-view but on eye high of two practical experts who evaluate the coaching intervention.)

1) “How do you personally rate the success of the coaching?”

<table>
<thead>
<tr>
<th>Failure</th>
<th>neither/ nore</th>
<th>Success</th>
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<tbody>
<tr>
<td>negative results,</td>
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<td>disadvantages,</td>
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<td>+4</td>
</tr>
<tr>
<td>-1</td>
<td>+1</td>
<td>+5</td>
</tr>
</tbody>
</table>

2a) “Now I would like to know, by which results or criteria you substantiate your success rating. At this point, I am not concentrating on how that success was achieved. I would like to know which concrete results or goals attained, criteria or features of the changes in your opinion indicate the success.”

(Protocol catchwords and write agreed labels on green cards. The cards support the visualisation of the protocol and helps to structure the interview and reflections.)

2b) “Did you observe any negative results or disadvantages by the coaching?”

(Protocol catchwords and write agreed labels of negative results on red cards.)

→ (If the coaching is rated 0 or negative, reformulate question 2a to “low” o negative success rating” and the question 2b: “Did you observe any positive results of the coaching?”)

3) „Which causes in your personal opinion have led to the occurrence of the first (etc.) result? What are possible facilitators?”

(Protocol catchwords and write agreed labels on yellow cards.)

Reflection of the goal attainment

4) “Which goals the coachee tried to attain?” (Protocol and number catchwords)

5) “Please rate the attainment of the first goal on a scale from 0 to 100 percent.” (Repeat for all goals.)

| 0% | 25% | 50% | 75% | 100% |

6) “By what percentage do you attribute the goal attainment rate to the coaching?”

7) “If not by 100%, by what else?”
8) “What could you do in comparable cases to attain the remaining x percent? (Or: “What could you do to rise the goal attainment rate in similar cases in the future?”) (Protocol and write labels on blue cards)

(2) Satisfaction with the coaching sessions
The coach brings the empty table 1, prepared for the coachee and explains the structure. The coachee is asked to memorize the sessions and to add subjects in the header, she/he remembers. Then she/he is invited to rate the satisfaction with the session and to mark the cell with the adequate value. The coach draws a line connecting the ratings (cf. Table 1: Satisfaction with the coaching sessions).

Additional questions:
9) „Which session was the most important in your view? And why?“
10) „What did you like in the coaching sessions? What would you have wished to be different?“
11) „What is your personal conclusion after the coaching?“
12) „Is there anything that you would like to change autonomously after the coaching?“
13) „Would you be interested in coaching in the future?“ „Why not/ Why?“
14) “Is there anything you would like to mention in addition? “

(3) Comparison and common reflection of the interview and satisfaction ratings
A clear positive and empathetic acceptance of the comments, labels and ratings of the coachee in the interview is a necessary precondition of the following phase where the coach describes and compares her/his observations and ratings of the coaching with those of the coachee. It is not necessary to go into all details. Normally the coachee is interested only in major similarities and differences.

Psychologically it is recommended to start with the similarities. Very often the coach is able to predict the satisfaction ratings of the coachee very closely. Therefore this is often a very good start of the comparison process.

If there are relevant differences of the satisfaction ratings it is interesting for the client to explain the different perspectives and aspects that have been applied. But at the same time express warm acceptance of the view of the client. By this, the coach behaves as a model of understanding and accepting different or conflicting views and perspectives. It is important not to devalue differences!

The same principles apply to the comparison of the Change Explorer-Interview. Whereas the success ratings often are similar, normally many concrete differences of labels of the green, red and yellow cards can be observed.

‘Big changes’ reported by the coachee in the interview will often also be observed and mentioned (perhaps with different labels) on green cards by the coach. But some positive results perceived by the coach will surprise the coachee. Sensitive observations of changes of the coach will show the coachee how well the coach understands her/him.

The Change Explorer is an instrument, which helps to explicate and compare complex observations of changes that are not measurable. Following Festingers (1954) classical social comparison theory, people have a need for comparison of their evaluations of relevant changes. If it is impossible to apply hard facts and measures, they have to rely on social validation of their evaluation by key persons. We often observed that the coachees are highly motivated to compare and reflect their intuitive impressions, even if they disagree.

More important than the comparison of the perceived coaching results is the comparison of subjective preconditions and causes (the yellow cards) of resulting changes. Normally both, coachee and coach, agree in the relevance of a positive coaching relationship to be a success factor of coach-
ing. Business people often mention ‘a good chemistry between the coach and themselves’ or ‘the same wavelength’. By professionals, it is called the ‘supportive and trusting relationship’, ‘empathy’ or ‘esteem and emotional support’. Without it, successful coaching seems to be impossible.

Coachees often attribute the results of coaching to concrete personal abilities and strengths or circumstances and to the methods applied by the coach. The coach often mentions the potentials or self regulation competences of the coachee and also the intervention methods (Greif, 2008). The coachees explain low success rates or failure by inadequate methods, while the coaches attribute it to lacking abilities or low self-reflection of the coachee. Partly this resembles the classical self-serving bias, which says that people attribute failure to other people or environmental influences and positive results to their individual abilities (Miller & Ross, 1975).

It is a very disadvantageous informal customer recommendation, if the coachees attribute positive results of coaching simply to their personal competences and negative results to inadequate coaching methods (not to mention low competences of the coach). We recommend informing the coaches about general success factors in the coaching process that empirically correlate with outcome criteria. The purpose is to enlarge the knowledge of the coachee evaluating the complex coaching service adequately. Such a strategy is standard in building customer relationships in other complex services (e.g. software systems). Elementary coaching success factors are (Greif, Schmidt, & Thamm, 2010):

(1) Esteem and emotional support
(2) Result-oriented problem-reflection
(3) Result-oriented self-reflection
(4) Affect reflection and calibration
(5) Clarification of goals
(6) Activation of client resources
(7) Support of transfer into practice

Especially it is important to help the coachee to understand factor 6, resource activation. It is possible to distinguish between the internal resources of the coachee (motivational and personality traits, abilities, competencies, and potentials) and the external resources of the coachee (e.g., external expert knowledge, consultants, emotional support, concrete help by family and friends, or support from those in the occupational environment). In summary, we call these personal resources. If the coachee understands this factor, she/he is able to value the interactive influences of both, coach and client on the observed changes.

Red cards that differ strongly, sometimes challenge the coach. Acceptance of negative feedback, Perspective Taking Capacity (Cavanagh, 2010) and psychological competencies of the coach are necessary. Of course the coach should never present discriminating labels or perceptions that cannot convey constructively to the coachee. Low success ratings and red cards of the coachee have to be regarded as negative feedbacks that have to be accepted as a critical perspective. A summary of the negative evaluations and differences of perspective or views (that is accepted to be correct by the coachee) is an adequate professional behaviour, even if the coachee presents a seemingly inadequate or unfair critique. But the coach is allowed to describe his different evaluation assertively and to start a short common meta-level reflection on differences of the perspectives (for more information see below in the next section). The Change Explorer-Methods therefore allows reacting actively and in a constructive way to such situations.

(4) Open questions and problems

After the closing meeting a new phase starts where the coachee reflects and acts without direct support of the coach. Therefore is the right moment to look ahead to future plans and reflect on important open problems or goals and action intentions that have not been realized.

Also it is necessary to reach an agreement, how to communicate the coaching experience and its results to other people, especially to the superior of the coachee or a principal, who payed for the coaching. Commonly accepted ‘green cards’ can be used as an orientation. If the coaching is not regarded as a success, a comparison of the red cards and their subjective causes is a good starting point. It is important that the coach accepts the negative feedback implied in the red cards, but
in the reflection partnership she/he should be able to compare her/his evaluation and explanation with those of the coachee from a common meta-level. If it is impossible to reach an agreed and communicable evaluation it is always possible to “agree to disagree”.

(5) Formal ending

A formal ending closes the coaching. It comprises last clarifications, and ‘celebration’ of the leave-taking with good wishes for the future of the coachee.

(6) Reflections after the ending

Take time after the ending having a look through of the protocols and cards of the interviews and reflecting on them. Reflect on the purpose, perspective and process:

- What did I learn about my purpose as a coach?
- What perspective did I bring to that case? How can I enlarge them?
- What did I learn about the process?

Make notes to yourself: What did I learn and what do I intend to change in the future?

Results

The coachee and coach commonly review and reflect the phases of the coaching and the development of the coaching process. Together they analyse and reflect individually observed positive and negative results and their possible causes or barriers of transfer of action intentions into practice. The coach gets a substantial feedback, not only by the results observed by the coachee, but deeper insights by comparing the coachees and her/his subjectively attributed causes of concrete positive and negative outcomes. If she/he and the coachee are able to facilitate an open and cooperative communication with the coachee in the interview and common reflection, they develop an intensive learning partnership that goes beyond the standard feedback for coaching. The coachee and the coach in comparing their different views and perspective of the observed changes enlarge their ‘Perspective Taking-Capacity’ (Cavanagh, 2010).

Similar to scientists, through the Change Explorer-Method, the coachee and coach develop each their “subjective theory” of the coaching process, its preconditions, hypothetical causes and observed positive and negative changes and exchange their theoretical assumptions and observations. The reflection of the observed changes following Argyris (1998) can by classified as double loop learning. In comparison to standard single loop learning (learning to perform changes without reflection and changes of the process and its results), it can be classified as a higher form of reflective meta-cognitive learning. It is expected to be more effective and powerful, but difficult to obtain.

The method is a practical tool for this objective.

The common reflection on eye height is a self-rewarding round off the coaching. It leads to a clear psychological disengagement, but can open doors for future cooperation.

References:


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