


# Transformative Learning: Leveraging the Co-Active<sup>®</sup> Connection

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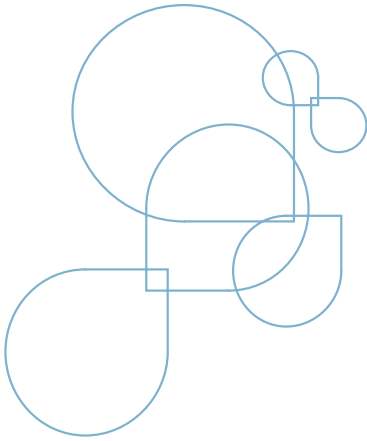
## ABSTRACT

Coaching is a didactic relationship entered into by the coach and the coachee for the purpose of developing the performance of the client (Rao 2014). Coaching is an increasingly popular intervention used in facilitating both personal and professional development. In both spheres, the individual being coached – the coachee – is guided through a journey of discovery and revelation. This paper demonstrates how purposeful non-directive coaching can be used in both spheres to enable personal and organizational results. The paper illustrates how coaching can offer a system through which to challenge narratives that come to dominate organizations and, by default, behaviors within it. The paper draws upon the Coaches Training Institute (CTI)'s Co-Active Model, which elegantly connects the art and practice of coaching together with the science that supports its efficacy. The Co-Active Model balances self-awareness, a keen agility with relationships, and courageous action to create an environment where individuals can be deeply fulfilled, connected to others and successful in what matters most. Utilizing a Transformative Learning approach, the model can be used in both personal and professional development.

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## Transformative Learning: Leveraging the Co-Active® Connection

### Coaching and Connection


Coaching may well be one of the most heart-centric opportunities to make a difference, to authentically connect with purpose, and to contribute to the powerful and meaningful transformation of others. Coaching is fun, rewarding and life-changing! And the coaching process contains some of the greatest life lessons both for the coach and the coachee. “We work on ourselves in order to help others, and also we help others in order to work on ourselves.” (Chodron 2012).

There has been a growing universal shift over the last several decades represented by a search for greater self-awareness and to define our own sense of spirituality. Aburdene (2005) has argued that it constitutes a “megatrend” likely to dominate much business activity in the years ahead. Individuals are no longer attaining fulfillment through outdated organizational patterns and paradigms. Instead, they are seeking ways to uncover and express their authentic selves and limitless potential through raised consciousness.

With this shift in the collective consciousness of humanity, individuals embark on their personal quests for soulful connections – those within their own mind, body and spirit, as well as connections within families, among social networks and within organizations. Coaches seeking the connection between spirituality and self-development are drawn to coaching institutes that guide and promote this path, and individuals seeking greater fulfillment in their lives seek coaches who have these insights to evoke the revolutionary transformation sought by the coachee. Moreover, organizations are responding to the changing demands for heart-based fulfillment of employees not only because it feels good to have satisfied employees, but also because it is paramount to long-term success in business. At the 2014 World HR and Coaching Congress in Mumbai, India, on spirituality in the workplace, Shriram Darbha, head of HR for BSE Limited (Bombay Stock Exchange), equated engagement with spirituality and said a spiritual workforce is the most engaged and productive of all. Indeed, employees working in environments incongruent to who they are will seek other avenues for employment in which they can thrive and excel.

#### KEYWORDS:

Organizational Development, Coaching, Transformative Learning, Executive Coaching, Organizational Narratives, Human Resources (HR), Change.

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### Organizational Inference

When an organization is going through a major change or restructure, there is an instinctive reaction to look outside their organization for a management expert, a change expert or a consultant to guide the transformation. By incorporating purposeful non-directive coaching conversations that celebrate the best of what is and utilize previous experiences, organizations can create their new state using organizational intelligence and knowledge management. While external input is valuable and important, we must understand that this input supplements what already exists in the very core of the organization – experiences and wisdom that can be drawn out through powerful coaching experiences.

If you are an experienced Human Resources (HR) Professional, you probably think coaching is just another name for what you've already done for years and continue to do – that of helping managers increase their capabilities and knowledge of how to deal with people. The skill of coaching today, however, has the infinite potential to revolutionize the HR professional's relationships with organizational managers and executives. Traditionally, the HR role as coach involved everything from administering and translating 360 review tests that highlighted a manager's weakness and strengths, to being the sounding board that every leader appreciates from time to time. In this role, HR coaches used directive coaching approaches vs. non-directive approaches, in that they not only asked questions but also provided advice about actions that would have been more effective for future instances.

The newer coaching role that we encourage is one where the HR professional acts as a partner to their managers and focuses on their whole person development. Organizations that already use this practice tend to hire external coaches and consultants to develop these managers. HR professionals are fully capable of being the internal go-to person who can build capacity in their organizations and are encouraged to pursue credentials that set them apart as impeccable coaches if they are to command trust and reliability within their organizations.

### The Coaches Training Institute (CTI)'s Approach

The Coaches Training Institute (CTI) adopts a whole-person-centered approach to coaching, and has over twenty-five years of experience in facilitating and certifying internal coaches through in-house training programs. CTI also offers train-the-trainer courses, should an organization prefer to train their own employees to deliver and monitor coach training courses in their respective organizations. One of the key aspects that sets CTI apart from other coach training institutes is the use of Transformative Learning in its curriculum. Transformative Learning theory says that the process of perspective transformation has three dimensions: psychological (changes in understanding of the self), convictional (revision of belief systems), and behavioral (changes in lifestyle) (Clark 1991). An organizational leader's belief system may be referred to by different names – mental model, paradigm, worldview

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— but no matter what it’s called, that belief system exerts considerable influence on his or her leadership style. Transformative Learning is based on the view that an individual’s beliefs influence his or her actions in powerful ways that may or may not be evident to the person. “Transformative Learning is the expansion of consciousness through the transformation of basic worldview and specific capacities of the self; transformative learning is facilitated through consciously directed processes such as appreciatively accessing and receiving the symbolic contents of the unconscious and critically analyzing underlying premises” (Elias 1997, p.3). “A defining condition of being human is that we have to understand the meaning of our experience. For some, any uncritically assimilated explanation by an authority figure will suffice. But in contemporary societies, we must learn to make our own interpretations rather than act on the purposes, beliefs, judgments and feelings of others” (Mezirow 1997, p.5).

An important part of transformative learning is for individuals to change their frames of reference by critically reflecting on their assumptions and beliefs and consciously making and implementing plans that bring about new ways of defining their worlds. This process is fundamentally rational and analytical. (Mezirow 1997; Grabove 1997, pp.90-91). Indeed, transformative learning develops autonomous thinking. (Mezirow 1997, p.5). This too, fosters so-called “vertical development” whereby individuals are empowered to become the authors of their own professional development. As leaders in both holistic coaching that embraces the transpersonal and the transformative organizational learning movement, CTI bases its curriculum on finding and enacting the connection between the quiet and still discovery of how we are (“Being”) and taking inspired action in what we do (“Doing”). With each coaching experience, the coach and coachee become curious about the meanings of our experience and perceptions, explore energies and intuition and in the process, co-create an explicit, yet constantly refreshed, designed alliance for a revolutionary transformation.

### The Co-Active Model

The Co-Active approach to coaching integrates three foundational principles that together serve to enhance the quality and results experienced in organizational settings through coaching: (1) Fulfillment – deriving deep satisfaction from work that is meaningful, value based, and purpose-driven, (2) Balance – viewing organizational challenges and opportunities from an empowered stance, making powerful choices and taking effective action and (3) Process – operating with full engagement and awareness of what is occurring at any given moment. These principles are at the center of the coaching process – the Co-Active leader always strives for the employee or team’s full realization of these principles. Co-Active coaching addresses the whole person.

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Fundamental to the CTI dynamic between the coach and coachee is the exploratory process of discovering “how we are” and “how we show up.” Both parties examine who they want to be in the moment. It is the essential experience of presence, in which all senses are awake, and there is a simultaneous expression of the authentic person as an individual and an interconnection of the person with others and the world around them. While many characteristics potentially influence interpersonal effectiveness, it is fundamentally who people are being in the midst of interacting with others that makes the biggest difference in achieving a successful outcome (Arbinger Company 1999). To explore our “being” requires the ability to quiet our minds so that in the stillness we can tap into our inner wisdom, creativity and resourcefulness. Some refer to this as meditation, others as reflection. In any case, it requires quieting our egos so that we can become present to the universal field of consciousness, from which our intuition, inspiration and innate inner wisdom can flow.

The “being” and the “doing” component of the Co-Active model is grounded upon four cornerstones that together support the notion of focusing on the whole person, rather than on a particular circumstance, challenge or opportunity. This holistic view sees coachees as individuals who are naturally creative, resourceful and whole, possessing their own innate inner wisdom that sets the stage for the coach and coachee to dance in the moment – be fully present in the here and now – with the agility to effectively respond to anything that comes their way and to co-create a plan toward revolutionary transformation. Co-Active coaches are trained to work with heart, mind, body and spirit in its entirety, with a commitment to focus on the whole person, the entire being.

The Co-Active approach begins with outlining a set of agreements between the coach and the coachee, also known as the Designed Alliance, which defines how the duo will interact and is open to revision as the coaching journey ebbs and flows along the path towards the coachee’s Fulfillment, Balance and Synergy. Both strive to integrate “presence” into their daily practices. Being present allows an individual to quiet the mind and simply observe thoughts and an entire range of emotions without judgment – simply welcoming each of them as they arise, knowing they are temporary and will pass. It is in this state of presence that we can then truly listen. Coaches are trained to listen using intuition to the words spoken by the coachee and also to the unspoken essence within the space – also known as reading between the lines. As both the coach and coachee quiet their minds, they can then, again without judgment or opinions, become profoundly curious about the coachees’ perceptions of self and circumstances and what is important to them. From this space comes action (“Doing”) based on increased awareness, self-knowledge, capacity and resilience. “While clarity of intention is the inner preparedness a person has for a task, Co-creativity is the responsiveness to a task, both in oneself and in relevant others” (Jankelson 2010, p.16).

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## Conclusion

Numerous studies provide evidence that coaching in the workplace is an effective strategy for boosting productivity, morale, job satisfaction and profitability (Bolch 2001; Thach 2002; Luthans and Peterson 2004; Wales 2003; Wilson 2004). In an organizational context, coaching is designed to improve human capacity in executing superior organizational results. Coaching in organizations is no longer the territory of just HR Professionals, trainers or externally hired coaches; it is an essential leadership attribute and a core leadership competency. Empirical evidence supports the use of both internal and external coaches. There are moments when an organization will opt to use an external coach, such as when individuals are concerned about confidentiality or conflicts of interest, or an internal coach, when knowing the organization's politics, history and culture is critical. A study by Marshall Goldsmith (Goldsmith et al., 2004) of 86,000 people across 15 global organizations found that internal coaches are capable of producing the same positive results as external coaches. Since then, there has been increased interest in developing internal coaches that function within their organizations. Regardless of what option the organization chooses to pursue, a review of qualitative and quantitative data reveals that executives alongside HR professionals and those who receive coaching are inarguably pleased with the results.

The recent trend in businesses to reclaim and recognize the spiritual nature of people and the importance of incorporating the “whole person” at work will continue to change the face of how business is done for the foreseeable future. Organizations are changing the way they manage change and are relying on the art of coaching to facilitate the change by using an enterprise-wide approach to move their entire workforce toward peak performance, by creating coaching cultures. Incorporating a Co-Active coaching culture into an organization that celebrates wholeness, including the transpersonal or spiritual if that's important to the individual, is key to creating a workplace culture that supports people in growing and contributing to society in a meaningful way through care and compassion, integrity and service to others.

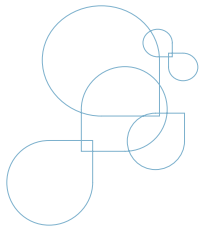
When you connect to your true self, you find powerful guidance to manifest full potential in your life. The more we examine our personal values, the more we find our universal and collective expression, allowing us to align our sense of purpose with the greater good. Co-Active coaching provides a structure of accountability and support to help you discover and generate personal and professional goals. Discovering one's inspiration, direction, meaning and purpose is key to leading a successful life, be it at home or in your respective organization.

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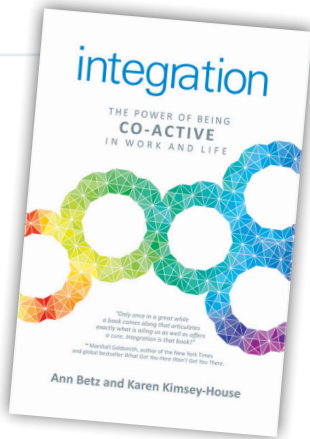
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**Integration:  
The Power of  
Being Co-Active  
in Work and Life**

by Ann Betz & Karen Kimsey-House




*"Only once in a while a book comes along that articulates exactly what is ailing us as well as offers a cure. Integration is that book!"*

-- MARSHALL GOLDSMITH, author of the *New York Times* and global best-seller, *What Got You Here Won't Get You There*

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