INSIGHT GUIDE #86

EXECUTIVE EDUCATION

To coach or not to coach – how ready does a team need to be?

‘Did I think the team were ready for focused development and team coaching processes at the beginning? If I am honest, no!’ (Michael, team leader).

This guide draws on a real team coaching case study to illustrate the concept of team readiness, considering how ready a team needs to be before team coaching can commence.

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Concept of team readiness

We use early conversations with a team's development sponsor, often the team leader or a human resources representative, to help understand the team's context, desired outcome, and gauge whether team coaching is a suitable intervention.

If team coaching appears to be suitable, work continues, preparing and scoping the engagement in more detail. This might involve a more in-depth assessment of team readiness, and we might use a checklist such as Clutterbuck's (2020) readiness criteria to support thinking.

Clutterbuck's criteria includes questions about the engagement, such as:

- Does the team see itself as a team; is there interdependence?
- If not, can/will/should it become a team?
- Are team members able to commit to open dialogue?
- Are there existing conflicts to resolve before starting?
- Is there a desire to experiment and change?
- Is the team too large?
- Is the team leader on board, and strong enough to handle challenges?
- Are there adequate resources available to support change and actions taken?
- Does the team expect the coach to do the work for them?
- Does the leader expect the coach to become a surrogate leader?
- Does the team understand the coaching process; if not, will they try it?

If the team are considered not ready, other interventions might be recommended instead, such as one-to-one coaching of the leader and team members, teaching, facilitation or team building.

Before we dive in, here is a brief overview of the case the insights are based on.

The case

This case focuses on a new senior leadership team, formed post re-structure.

For the first 18 months of the engagement I was a transformation manager, reporting to Michael (the team leader). My remit was to support the team to become a team, and to help individual team members become great leaders. Regular team coaching sessions were used as the primary intervention with the collective team. I also had the opportunity to informally coach team members, and Michael, one-to-one on a daily basis.

I worked with the team for a further 18 months as an external consultant, with the scope during this second phase limited to collective team coaching.

The environment the team were working in was complex and challenging throughout this three-year period. In addition to embedding themselves in new roles, team members were recruiting for multiple vacancies across the function and leading critical process and system changes. The wider organisation was subject to funding constraints, changes in operating regulations, building moves, multiple restructures and global crises, fundamentally changing the way the organisation and the team worked.

Given this context, how ready was the team?

Readiness in this case

I was new to the concept of team coaching at the time I began the engagement, and was not aware of Clutterbuck's (2020) readiness criteria.

> The most significant hurdle at the beginning of the engagement was getting team members to willingly attend sessions

If I had been aware, and had discussed the above criteria with Michael, I doubt it would have made any difference to the decision on whether to proceed. As far as Michael was concerned, team development was happening whether the team were ready or not, and team coaching would form a significant component of it.

Michael said:

'We had a clear strategy in place that included focus on people as an enabler, and we had Helen lined up and ready to go. We were doing it!'

If applied, Clutterbuck's (2020) criteria would have highlighted red flags across all areas. Refer to the left side of Figure 1.

Expanding on four of the red flag areas:

See themselves as a team

In early team sessions, I brought up the notion of collective development goals. The response was pushback, including comments like 'We are not a team anyway, so it's not clear why this goal discussion is relevant.' Apart from Michael, team members believed they just happened to report to the same person and had little in common.

Desire to experiment and change

The first step in embracing experimentation and change is to turn up. The most significant hurdle at the beginning of the engagement was getting team members to willingly attend team sessions.

Michael effectively forced attendance.

Team members said 'We did not understand what a team development journey looked like or what it involved, so initially we were sceptical and pushed back', and 'Our engagement score was high already. Why were we investing more time on this?'

Michael commented:

'The team were hesitant about the process... there was trade-off between getting work done now and investing in longer-term development.'

Figure 1: Team readiness criteria applied to case (adapted from Clutterbuck, 2020)

Beginning of year one		End of year one
🚩	Does the team see itself as a team? Is there interdependence?	✓
🚩	If not, can/will/should it become a team?	✓
🚩	Are team members able to commit to open dialogue?	✓
🚩	Are there existing conflicts to resolve before starting?	🚩
🚩	Is there a desire to experiment and change?	✓
–	Is the team too large?	–
🚩	Is the team leader on board, and strong enough to handle challenges?	✓
🚩	Are there resources available to support change and actions taken?	✓
🚩	Does the team expect the coach to do the work for them?	🚩
🚩	Does the leader expect the coach to become a surrogate leader?	🚩
🚩	Does the team understand the coaching process; if not, will they try it?	✓

Leader onboard

At the beginning Michael talked about his vision for the team having 'A modern leadership philosophy based on trust and collaboration, rather than traditional (top-down) managerial effectiveness.' Although Michael was the primary sponsor of the development work, and was clear on what he wanted for the team, his own leadership style was not in line – instead employing a top-down approach.

Available resources

A complex and challenging environment meant the team were in survival mode for the first year of the engagement. Although team members attended sessions, under duress, there was little energy or capacity to take on board or embed work done outside of sessions themselves.

Michael commented that 'The team had a new structure to implement, new roles, new challenges, new technology and processes to implement, new teams to recruit and build, and I was asking them to work on their leadership and how we operated as a team at the same time.'

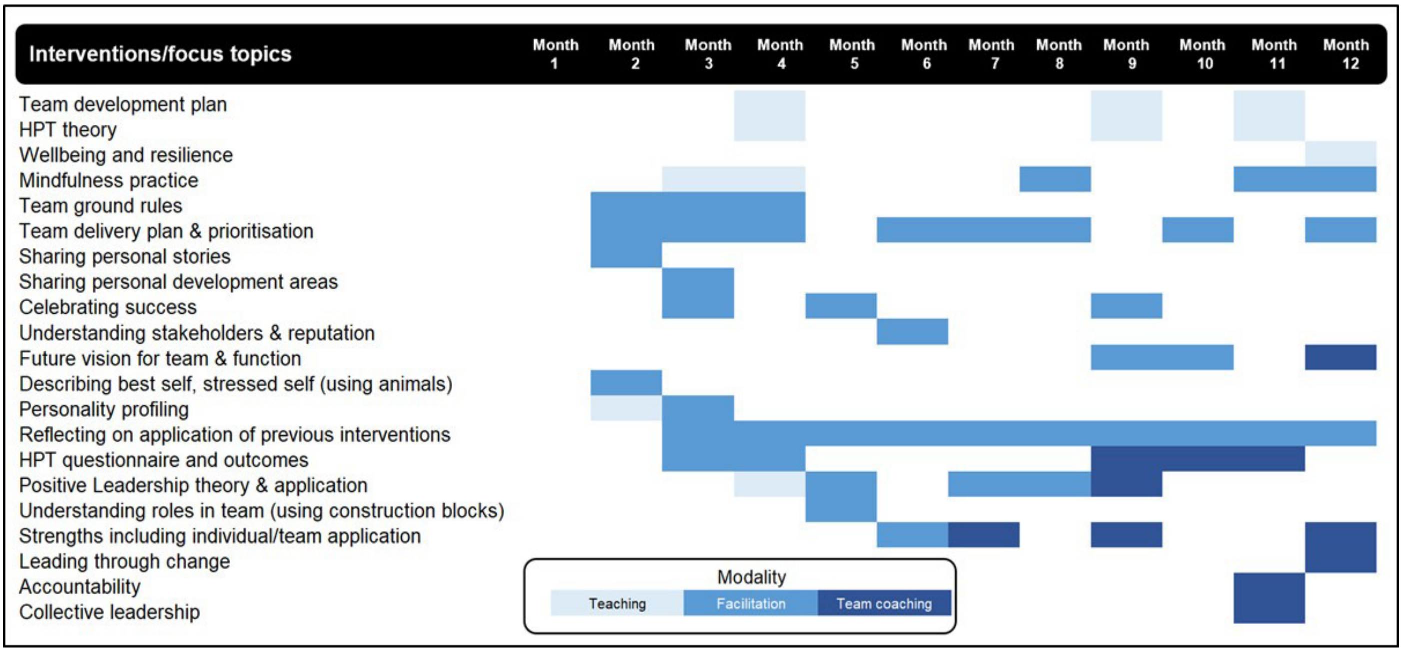
Given that 'We were doing it' (team coaching was happening) and challenges related to the team's ability to take up and adopt the development approach were evident from the start, what implications did this have for how coaching was delivered?

Approach, modalities and interventions

Monthly team sessions took place throughout the three-year period the case covers. These full-day events were broken into two parts, with the morning focusing on team development work, including team coaching, and the afternoon on strategic initiatives – an opportunity to work together on common interests and apply learning.

Figure 2 summarises interventions across year one, along with primary modalities used for each intervention.

Figure 2: Year one modalities (adapted from Zink, 2020)



Shift in readiness

Working together as a team in early sessions, albeit with forced attendance and being heavily facilitated, gave the new team an opportunity to spend quality time together and move their focus from what they worked on day-to-day to how they worked together. Over time sessions became less structured, agendas became a loose guide, and comfort, psychological safety and trust grew. Opportunities for unplanned and natural team coaching conversations increased.

As indicated in Figure 2, the team coaching component of development sessions reached approximately 50% of development time by the end of year one. A similar trend continued into years two and three.

The change in modality was driven by a change in the team's readiness, and that readiness was accessed by working with the team in a consistent and gradual way over time.

Figure 1 shows the status of Clutterbuck's (2020) readiness criteria at the end of year one on the right – with significantly fewer red flags!

The four red flag areas outlined above are revisited and used to illustrate specific interventions and activities that helped the team become more ready.

See themselves as a team

It was clear to Michael that the team needed to be a team – whether or not they could see it for themselves. They had common goals, common stakeholders, and were heavily reliant on each other to achieve deliverables.

The conversation that followed was very much focused on connection and how they needed each other to deliver collective outcomes

An exercise used to support the team to see connections between their roles involved small plastic building blocks. They were asked to construct small models that represented their roles. Once complete, each team member described their model. I then offered the observation that only one model was connected to another party, and that party was a stakeholder outside the team. I continued with curiosity, wondering if my observation was an accurate reflection of how they worked. A flurry of activity followed, involving the construction of pipes and bridges connecting their models. More characters were added, representing stakeholders, and more pipes and bridges were built to connect them. The conversation that followed was very much focused on connection and how they needed each other to deliver collective outcomes. A picture of the interconnected network of models was added to the team's written agreement, and physical models were taken back to the office as a tactile reminder of the conversation.

Desire to experiment and change

To begin with, Michael effectively forced team members to attend regular team development sessions. However, over time, by experiencing it and seeing improved relationships, communication and deliverables, attendance and buy-in was no longer an issue.

Team members said 'We have learnt the benefits of focusing on development, and we have all invested in this for our direct report teams as well', and 'The growth in our collective development was well worth the investment we made. We have transitioned from being active resistors to avid supporters.'

As time progressed, incongruency and issues with day-to-day leadership impacted the team's ability to deliver, resulting in tension and frustration

Leader onboard

Michael's leadership was out of line with the vision he held for the team. As time progressed, incongruency and issues with day-to-day leadership impacted the team's ability to deliver, resulting in tension and frustration.

With Michael's prior approval, I asked him to leave the room for part of a team session. During his absence I supported the team in brainstorming and creating a storyboard outlining key things they appreciated and needed from Michael. Once comfortable with the content, I invited Michael back into the room and the team shared their story. This led to a much deeper conversation around ways the team could support Michael to be the leader they needed.

A team member said:

'One of our most insightful learnings was the impact we collectively had on Michael's style through open conversation around what we needed. Those conversations were scary, yet useful and rewarding at the same time. It felt good to openly articulate what we needed.'

For more on the important role leaders play in team coaching refer to: *Insight Guide #87: Leaders can make or break team coaching*.

Available resources

Initially there was little motivation, or capacity, to work on actions agreed in team sessions outside of sessions themselves. Over time, regular and consistent investment in team development improved relationships, communication and deliverables, which in turn released capacity to focus more on development – a circular and reinforcing cycle.

A team member said, 'It is interesting looking back and realising that real change comes from us – starting with ourselves.'

Implications

Michael's edict that 'We were doing it' forced team development and coaching to commence whether the team were ready for it or not.

By doing it, they became ready; it was a 'chicken and egg' situation. Work was done to ready the team for intensive development and coaching, and that happened by investing in development and coaching.

More broadly, my sense is that a team will never really be ready for team coaching, and there is never a 'good time' to start. Complexity, uncertainty and fast-paced environments have become the norm rather than the exception for teams. As illustrated by this case, if we had waited until the environment was more settled, or the team had more capacity, we would have found things were never settled, and there was never enough capacity – and we would not have started at all.

While useful to consider, Clutterbuck's (2020) readiness criteria might be better used to inform types of interventions that might help a team become ready for more intense work, rather than as hard and fast stop–go criteria.

It is more important to get going and pay attention to what might benefit a team at any particular time, and to remain flexible. Hawkins (2022) suggests that the style and approach a coach uses with a team, or the mix of modalities and interventions, should align with the team's maturity level. It's about coaching the team where they are at.

Although I did not formally assess the team's maturity or use the readiness criteria outlined in this guide to inform the approach used in this case, I suspect I did so intuitively. Most of the time, my intuition was appropriate – and when it was not, adjustments were made quickly based on active feedback from the team.

A final comment from Michael: 'Looking back now, I made the right decision. As hard as it was for all of us to carve out the time early on, if we had not, the impact of environmental changes in years two and three would have destroyed us. I am convinced there is never a good time or a right time to begin focusing on team development and coaching – just start!'

This guide is extracted from a more extensive case study (Zink, 2023).

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Helen Zink

Helen holds many qualifications, including Senior Practitioner Team and Individual Coach (EMCC). Helen is author of *Team Coaching for Organisational Development: Team, Leader, Organisation, Coach and Supervision Perspectives* (Routledge, 2023).

References

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