

# choice

the magazine of professional coaching

## Instruments in Coaching

*The landscape of assessments*

Coaching With  
Assessments

The Coach's Toolbox

The Reiss Motivation  
Profile

Inside the EQ-i 2.0





# 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?





# Coaching with Assessments

## Taking the guesswork out of coaching

By Anthony Attan, PhD

**“B**egin with the end in mind,” Stephen Covey famously said. Great advice for anyone looking to improve their life; however, in order to reach any goal, it’s not enough to just define this end point. Even Google maps require you to enter a starting location. Without it, you’ll end up with a nice map of your destination and no idea how to get there. In coaching, that starting point comes in the form of self-awareness.

Research has shown that self-awareness is a powerful agent for lasting behavioral change, and the use of assessments is a great way to build it. My own dissertation explored this topic by researching whether a modest amount of coaching using a personality assessment could increase the effectiveness of virtual teams.<sup>1</sup>

Virtual teams have a tendency to have lower levels of trust, more misunderstandings, less knowledge sharing and weaker decision making than their face-to-face counterparts. I wanted to discover if a session of coaching based on a personality assessment with each team member would increase their self-awareness enough to make the



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team more effective. Coaching was chosen as the intervention based on the robust and agile nature of coaching to handle the complexities of working on a virtual team. I chose personality-based coaching to make the most powerful link to self-awareness. The specific assessment utilized was the Focus Energy

Balance Indicator (FEBI®)<sup>2</sup> based on its level of validity, its design as a coaching tool, and its integrated approach to personality, considering components that impact virtual team effectiveness.

By examining real virtual teams and using a control group, the study was able to find a significant

**“Coaching is a dynamic and agile process and should remain so when assessments are utilized.”**

increase in team effectiveness for those that received only one session of coaching based on a personality report. These results speak to the power of utilizing assessments in coaching. In this study, a personality assessment allowed individuals to see how their own personality influenced their performance on the team. They became aware of how their own thinking modes, emotional reactions and behaviors were impacting team effectiveness.

How can you incorporate the use of assessments into your coaching for even better results? Here are some tips:

### Define the Need

First, make sure you pick the right assessments to use. It is not good enough to use an assessment because it's the only one you've been trained to use. Rather, you want to match the assessment to the need. Here are a few good questions to ask when choosing an assessment:

- What is the goal of the coaching engagement?
- What information would add value to this particular coaching engagement?
- What is the scope of the coaching: client's budget, time, who is involved, etc.?
- What is the purpose of the assessment and how do you plan to use it? Is it for general self-awareness, or for a benchmarking tool to gauge progress?

### Choose Wisely

Based on your responses to the above questions, choose an appropriate assessment that will provide useful informa-

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# Feature

tion to aid in the coaching process. If you don't have an assessment in mind, try starting your search by reaching out to your network of other coaches, such as the *choice* Magazine group page on LinkedIn.

Once you find an assessment that seems to meet your needs, take a deeper look into the background of the assessment and the resulting report. Most assessment firms will provide sample reports and host free webinars to practitioners interested in using their assessment. In addition to the report language, make sure the assessment has

been validated to ensure accurate and consistent results. The assessment firm will typically provide validation information upon request, and often have white papers dedicated to addressing these questions.

## Prepare

Once you've landed on the right assessment to use, you want to make sure you use it the right way. Make sure you've been trained to debrief the assessment, and you're comfortable addressing any questions your client may have. If training isn't an option,

partner with another coach who has been trained to debrief the findings with your client. Best practice is to get the proper training yourself; however, the expense of an assessment training course may not make sense for an assessment you only use once. Before you share results, or even ask your client to complete a questionnaire:

- Know how and when you will use the assessment in coaching.
- Set expectation with client (i.e. why are you asking them to complete an assessment?)
- Integrate assessment learning into coaching, but be careful it doesn't dominate the entire engagement.

Prior to meeting your client, create a plan on how you would like to incorporate the assessment into your

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coaching. It can be useful to pick a date during your engagement to come back to the assessment allowing your client to reflect on progress made. Remember to use the assessment as a useful guide while not relying on it too much.

## Debrief With Forward Momentum

With a little bit of prep, you're ready to hold a coaching session based on the assessment you chose. To ensure that session goes well, here are some tips:

- Begin by validating the report with respect to their own experience. Do they agree with the report? Does this align with other feedback they have received? Any surprises or questions?
- Review any implications of the re-



port. What does this report mean for their ability to obtain their goals? Or for how they approach work and relationships?

- Help your client choose at least one shift they would like to make based on their report. Have them commit to a behavior to practice that shift, a way to cultivate it over time and some token to add to their work/home to keep it top of mind.

Coaching is a dynamic and agile process and should remain so when assessments are utilized. Although coach-

ing isn't as simple or defined as those driving directions you get from your Google maps, with a good assessment you can help your client get a better grasp on that starting point, which will help ensure those first steps of progress are heading in the right direction.

<sup>1</sup> Attan, A. (2012). *Virtual team effectiveness: A quasi-experiment exploring personality-based coaching on team performance, team member satisfaction and trust*. Dissertation submitted for PhD. Capella University, Minnesota.

<sup>2</sup> The FEBI is a validated psychometric assessment created by Ginny Whitelaw and Mark Kiefaber. [www.febiassessment.com](http://www.febiassessment.com)

## I am a Board Certified Coach (BCC)

*"I've always been an idealist. I've always had an interest in optimal living—developing the whole person, if you will—that which helps people to live fully."*

**PATRICK WILLIAMS**, Ed.D., Board Certified Coach (BCC)  
and founder of Coaching the Global Village

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