

# Designing Self-Observations A Framework for Integral Coaches Part 1

By Amiel Handelsman

August 2006

## Outline of Part 1

- A. The competence to design
- B. My first self-observations
- C. Self-observations versus practices
- D. Why we observe: the “purpose” of self-observations
- E. What we observe: the “object” of self-observations
  - 1. Observing the existing narrative and/or new narrative
  - 2. Observing four territories of experience
  - 3. Observing four quadrants

## A. The competence to design

“Whatever your age, your upbringing, or your education, what you are made of is mostly unused potential.”  
- George Leonard

Have you ever noticed that not all self-observation exercises lead to actual self-observation by clients? Some do, for certain, and the results are profound. But many don’t, and the upshot is two-fold:

- 1. Coaching that does not fulfill its potential
- 2. Clients whose heads are spinning with confusion and frustration

I think it’s important for all of us Integral Coaches to explore why this is and what we can do about it. In other words, to shed some light on what I think is one of the most misunderstood aspects of Integral Coaching.

It would be easy if we could simply blame all of this on our clients. Then, whenever we learned that they weren’t doing what we asked, we could silently condemn them, offer a few carrots for doing the right thing in the future, and move on to the rest of the program. But most of the time this would result in even less self-observation. No, let me restate that. It would result in more self-observation, all of it by the coach, and all of it focused on our irritation at the dismay state of things.

A more useful approach is to reframe clients’ breakdowns as windows into their worlds. Our response becomes not castigation but curiosity. We thereby appreciate our clients more fully.

This breakdown-as-window approach is one that many of us practice as a regular “part of the job.” Yet this approach has a limitation, one hidden by the benevolent intent of “curiosity about the client.” By focusing on the client, we ignore ourselves, particularly our own competence at design.

I think we can do better, and I think our clients deserve better. Where, then, to turn?

The obvious answer is to become much more skillful at designing self-observations. This has four dimensions:

1. Understand the key distinctions within the discipline of designing self-observations
2. Learn where our breakdowns occur in very specific and tangible terms and identify new distinctions that, if embodied, can resolve them
3. Appreciate the link between these breakdowns and our own way of being. (Go directly to Enneagram. Do not pass Go. Do not collect \$200). This is an optional step, typically most attractive to coaches either deeply engaged in their own development or cleverly avoiding step 4.
4. Practice a way of designing that resolves our common breakdowns by embracing new distinctions

This paper focuses on the first dimension: the key distinctions within the discipline of self-observation. I recommend reading it at least twice: once to get completely overwhelmed by the array of new possibilities; and a second time to discover something that could actually make a difference in your coaching.

My thinking continues to evolve and always depends on the goodness of others, so if you find yourself surprised, confused, or intrigued by anything here—or compelled to add something I’ve left out—please e-mail me while the kettle’s hot.

## **B. My first self-observations**

“When we go to visit a favorite masterpiece in a museum and are able to appreciate it in a new way each time we view it, it means that we are becoming more competent as a viewer of art.”  
- James Flaherty

At the age of nine, I started seeing a therapist to help me cope with recurring nightmares and other effects of my parents’ recent divorce. One day, this therapist told me to start paying attention to the anger I felt toward one parent. This was Self-Observation #1.

A year later, my father decided that I could be a track star. Part of the program he designed for me was to keep a running journal. The journal entries included not just how far I ran, but how I felt while running. The journal was a practice. Paying attention to the feeling of running was Self-Observation #2.

Not long after that, Dad asked me to do something that foreshadowed my adult interest in shifting people from the language of complaint to the language of commitment. Like a lot of kids entering adolescence (and adults!), I was adept at bitching and moaning. So he asked me to track how many times each day I complained. I did this for a month, then complained that it was too much work and stopped. This was Self-Observation #3.

My first “official” self-observation occurred at the start of New Ventures West’s *Professional Coaching Course*. Pam Weiss, our teacher, suggested to me that if I wanted to contribute more

fully to the world, oscillating between grandiosity and feeling inferior to others wasn't an effective strategy. She proposed a middle path of service to others, which begins by connecting as fellow human beings. The self-observation was simple: pay attention each day to when I felt most connected to others and when I felt least connected to others. And to notice what contributed to feeling connected or disconnected. This was Adult Self-Observation #1.

### **C. Self-observation versus practice**

"It's not that I'm afraid to die. I just don't want to be there when it happens."  
- Woody Allen

Sometimes people get confused about the difference between a self-observation exercise and a practice. The distinction is pretty simple. In *Coaching: Evoking Excellence in Others*, James Flaherty describes a practice as "a behavior we do again and again with the intention of improving a quality or competence." Practicing involves consciously doing something repeatedly. In contrast, self-observation involves witnessing ourselves doing whatever it is we are doing—which could include a new practice or something we've been doing for fifty years. In Flaherty's words, "To self-observe means to not become attached to or to identify with any content of our experience, but to watch alertly, openly, passively." To summarize, practice is a conscious and repeated action, whereas self-observation is a conscious and repeated witnessing of action.

Both practice and self-observation involve conscious intent. By engaging in them, we take a step beyond routine into something new and unfamiliar. This consciousness distinguishes practices from habits. A habit is an unconscious practice, and a practice is a conscious habit. When clients do practices enough, they become habits. This is often a good thing! Similarly, consciousness distinguishes self-observation from critical self-judgment. According to Flaherty, "Judgment includes a critical element that is absent from self-observation."

Pulling this all together, we might say that one purpose of coaching is to gradually transform a life of ceaseless self-judgment and lazy habit into one of continuous self-observation and vigorous practice.

### **D. Why we observe: the "purpose" of self-observations**

"I live on a one-way street that's also a dead end. I'm not sure how I got there."  
- Steven Wright

Why do we give people self-observations? I think that self-observations serve four instrumental purposes:

1. They test the validity of a new distinction, sometimes known as "checking it out for yourself." This is based on the ontological principle that the best evidence for the kind of human being we are is not our preconceived notions, but life itself.
2. They continuously shine light into an area that was once our client's blind spot. The more we observe, the smaller (or at least more well-lit!) the blind spot.
3. They help us become more skillful at self-observations, such that we can eventually design them for ourselves in this domain and others.
4. They develop our "witness" capacity. Once activated, the witness is present throughout our waking hours. It allows us to observe ourselves effortlessly and without design. This is a significant developmental advance.

This is one way to speak of self-observation. Another is to describe the stands that self-observation makes possible. I see three:

1. We take a stand for the inner life in a culture that devalues and corrodes it.
2. We take a stand for our very existence, tracking what the rest of the world pays little notice.
3. We take a stand for a life of conversation and relationship.

Through this lens, self-observation has intrinsic value because invites us into a richer experience of ourselves and the world.

## **E. What we observe: the “object” of self-observations**

“How come every time I get stabbed in the back, my fingerprints are on the knife?”  
- Jerry Harvey

Designing a self-observation involves making an assessment of *what* we want the client to observe. I refer to this as the *object* of self-observations. What possible *objects* can we suggest?

For any given distinction there is a rich array of possibilities. I have found that some objects are better—more useful and more “on the mark”—than others. Here are several ways to think about this.

### **1. Observing the existing narrative and/or new narrative**

We all know that clients live in narratives that shape how they live and what they consider possible in life. These *existing narratives* can act as *hindering distinctions* that gets clients into trouble. As Integral Coaches, we offer new distinctions that open the way to new narratives. When designing self-observations, we can focus clients’ attention on their existing narrative, a new narrative, or both.

Asking a question about the existing narrative is very different from asking one about the new narrative. These are qualitatively different self-observations. How do we decide which to focus the client’s attention on?

Robert Kegan and Lisa Lahey, authors of *How The Way We Think Can Change the Way We Work*, suggest beginning with a client’s existing narrative. They call this the Big Assumption and propose that people observe it before doing anything else. This creates a dramatic tension between how a client historically has viewed themselves and what they learn from studying their actual experience. This tension, Kegan and Lahey suggest, provides a starting place for people to develop. Only after a client recognizes the power their existing narrative holds over their life do we ask them to observe situations in which it does not hold true. And only then do we invite them to inquire into the source of the narrative and ask, “Are the reasons I originally adopted this still sufficient to hold it today?” It is at this point—notice we are at step four in the process—that we ask the client to consider a new narrative.

The advantage of this sequence is that it provides a sequential path from the existing narrative to a new narrative. The downside is that studying the omnipresence of an existing narrative for too long can sour one’s mood. After the initial bolt of recognition (*wow, look how I’ve been living!*) has passed, a client can get caught in resignation (*things are worse than I thought and aren’t getting any better*). This phenomenon is familiar to many coaches. About a month into the coaching program, our client clears their throat, pauses, and says, “Um, coach, I thought this work was

supposed to make my life better.” If the coaching is skillful, it will, but not without passing through this dark night of the client’s soul. By the way, this is one reason I like to receive full payment up front. When the going gets tough, the client has already committed their pocketbook to the process.

Here are questions that clients can use to explore both their existing narrative and a new narrative:

- Existing narrative
  - When have you observed your existing narrative in action? How do you know it is operational? What is this experience like for you?
  - What evidence can you find that your existing narrative gets you into trouble?
  - What evidence can you find that your existing narrative is not valid or helpful in all situations? I call this “dislodging the boulder.” (Moving the boulder is another matter entirely).
  
- New narrative
  - When have you observed a new narrative in action? How do you know it is operational? What is this experience like for you?
  - What are you doing differently when in the new narrative?
  - What evidence can you find that a new narrative is helpful in some situations?

## 2. Observing four territories of experience

Let’s say we’ve decided to focus a self-observation on the client’s existing narrative. What exactly do we ask them to observe about that narrative? The questions above are a nice start, but we can design with even greater precision.

Bill Torbert and Dalmar Fisher<sup>1</sup> offer a useful model for constructing questions with precision. They describe four territories of human experience: purpose, strategies, actions, and results. At any given moment, we have an opportunity to visit each territory in our awareness. They are all present at every moment. However, most of us favor one or two over the others. To broaden our awareness, Torbert and Fisher suggest exploring a particular set of questions for each territory of experience:

Territory of Experience	Questions
Purpose or Intentions	<ul style="list-style-type: none"> <li>• What were you intending to have happen?</li> <li>• What outcomes were you hoping for?</li> </ul>
Strategies	<ul style="list-style-type: none"> <li>• What did you think would be a good way of accomplishing this?</li> <li>• What strategy did you have in mind to reach those outcomes?</li> </ul>
Actions	<ul style="list-style-type: none"> <li>• What did you actually do?</li> <li>• What behaviors did you take?</li> </ul>
Results	<ul style="list-style-type: none"> <li>• What were the results of your action?</li> <li>• What happened?</li> <li>• How did others respond?</li> </ul>

---

<sup>1</sup> See their book *Personal and Organizational Transformations: The True Challenge of Continuous Quality Improvement*. Torbert, a professor at Boston College, is one of the only true developmentalists in business education. I have learned a great deal from his numerous books and articles. His web site is [www2.bc.edu/~torbert](http://www2.bc.edu/~torbert)

I like this model. It helps us think systematically about which questions to include in a self-observation. And it reminds us to not only use our “favorite” questions, but to design with all four territories of experience in mind. For example, when I came across this model, I realized that my designs had historically been biased toward Actions and Results. Purpose and Strategies had received short shrift. So I began to consciously include more questions like “What were you intending to have happen?” in my self-observations, as well as in my conversations with clients.

### 3. Observing four quadrants

As living beings, we show up every moment of our lives in four quadrants<sup>2</sup>. Each quadrant provides a different window into who we are, how we relate to others, and how we experience the world. In other words, our *self* is a four-quadrant phenomenon. So when we invite clients to observe this self, we can ask them to do this in any of the quadrants.

Quadrant	The Self We Observe
Quadrant 1 (“Q1”)	<ul style="list-style-type: none"> <li>• The interiors of our individual <i>selves</i></li> <li>• Our thoughts, feelings, emotions, visions, and intentions</li> </ul>
Quadrant 2 (“Q2”)	<ul style="list-style-type: none"> <li>• The exteriors of our individual <i>selves</i></li> <li>• Our body movements, our body posture, and our behaviors</li> </ul>
Quadrant 3 (“Q3”)	<ul style="list-style-type: none"> <li>• The culture and language in which our <i>selves</i> are embedded</li> </ul>
Quadrant 4 (“Q4”)	<ul style="list-style-type: none"> <li>• The physical and natural environments around our <i>selves</i></li> <li>• The ways we interact with these environments, fitting into some and not fitting into others</li> </ul>

There is an important difference between observing one’s thoughts and emotions (Q1) and observing one’s body and behaviors (Q2):

- With Q2, other people can observe the same phenomena our clients are observing because Q2 is by definition accessible to others’ five senses. This means that our clients can check their Q2 observations with others and compare notes. For example, if Sarah’s coach asks her to pay attention to her posture, Sarah can ask a colleague to photograph her while at her desk or speaking in an auditorium.
- In contrast, our clients can keep their Q1 observations private by refusing to talk with others. This is because the interior domain of thoughts and feelings is only accessible to others through language. If Sarah does not tell anyone how she feels while at her desk or speaking in an auditorium, no one else will know (though some may have assessments based upon prior knowledge of Sarah). Conversely, Sarah can develop a richer capacity for observing her inner world by regularly sharing her Q1 observations with a skillful coach. Through inquiry and deep listening, this coach can help Sarah differentiate between the emotion she is likely feeling (e.g. anger) and the emotion she thinks she is

---

<sup>2</sup> The Four Quadrants model referenced here comes from James Flaherty’s adaptation of Ken Wilber’s work. See Wilber’s book, *A Brief History of Everything*.

feeling (e.g. sadness). In addition, the coach can point out different shades of feeling (e.g. irritation versus rage).

With a few exceptions, schools at every level in western society focus on the outer world more than the inner world. The same could be said even more confidently about the organizations in which our clients work. Ken Wilber terms this the Collapse of the Kosmos: our culture squeezes four quadrants into two by acknowledging only those two—the outer worlds of behaviors and social structures—as valid. As a result, the practices our clients engage in as members of these communities (family, work, and school) focus their attention on Q2 and Q4—and reward them for this focus. No wonder they find the task of observing Q1 and Q3 to be so challenging!

There is also a broad difference between observing the two interior domains (Q1 and Q3) and the two exterior domains (Q2 and Q4). This difference stems from the developmental frame (or stage) through which adults make meaning of their experiences. As we've seen, Q1 and Q3 observations involve the witness capacity. The witness isn't something that arises at birth. We develop it through the course of adulthood, and some people develop it more fully than others. Herein lies a Catch 22. The very skill our clients need to do self-observation—the witness capacity—is fostered primarily through self-observation (and other contemplative practices like meditation and yoga).

What is the upshot of this difference? When we ask clients to focus on exteriors like their body and the physical environment, they may feel awkward, but it is at least somewhat familiar territory. In contrast, looking at their interiors is so unfamiliar that it can be disturbing and unsettling. Most people are unprepared for the complexity and dark corners of their inner lives.

With these points in mind, I propose Self-Observation Principle #1 and its corollary.

### **Self-Observation Principle #1**

To build someone's competence in self-observation, start by asking them to observe Q2 and Q4. Once they demonstrate consistent results from this exercise, introduce Q1 and Q3 observations.

### **Corollary to Self-Observation Principle #1**

Immediate Q1 and Q3 self-observations is for people with well-developed witness capacities.

Some coaches may object to this principle. They may say, "Look, if my client isn't paying any attention to quadrant 1, then that is their blind spot. So that is where I will focus the self-observation." This is a legitimate perspective. The location of a client's blind spot should contribute to our decision about where to focus self-observations. Yet it is only one of several criteria. According to this argument, the blind spot's location is more important than the degree to which clients are developmentally capable of accessing it.

I favor the reverse order of priority. Here is why: first, all human beings have more than a single blind spot. Just because they aren't keen to their emotional state (Q1) doesn't mean that they see everything happening in their body and behaviors (Q2). Indeed, once we as coaches become tuned into the body and the way people speak, it is hard to find a client who does *not* have much to learn in the Q2 domain. Second, blind spots exist not only *as* quadrants, but also *within* quadrants. After all, the Four Quadrants is not a model, but a meta-model: a model that contains other models. For example, Q2 contains dozens of models about the body and behavior, like those involving body types, posture, vocal pitch and tonality, sleeping schedule,

and forms of muscle relaxation. A client who is relatively more tuned into Q2 than Q1 may nonetheless still be sleeping only 4 hours a night, slump when they talk with authority figures, or shout in tense meetings. All of these provide useful objects for self-observation.

Therefore, even if a person spends less time attending to Q1 than Q2, it is still easy to find dimensions of Q2 that can be revealing. And if we think (as I do) that it is important to match self-observations to clients' developmental frame, then we will begin with Q2 because that is the best place to start developmentally. It is just like working with the Ten Ways<sup>3</sup>: we coach people where they are, not as deep as we see them.

At this point, some coaches may agree with the value of starting with Q2 (and Q4) yet wonder whether this is an either/or decision. Can't we ask clients to observe both the exterior and interior dimensions of their experience? For example, while observing their body posture or vocal tonality, can't they also pay attention to their thoughts and feelings? What's so bad about doing this, too? In response to this question, I offer Self-Observation Principle #2.

### **Self-Observation Principle #2**

It is OK to ask someone to observe both Q2/Q4 and Q1/Q3 if and only if two conditions are present:

1. The questions are framed such that Q2/Q4 are the major focus and Q1/Q3 appear in "bonus questions." For example: "When during the day were you leaning forward in conversation [Q2]? How did you feel while this was happening [Q1]." This contrasts to the following, which would violate the Principle: "When today did you feel sad [Q1]? What was your body posture while you were feeling this way [Q2]?"
2. The coach keeps in mind that most clients find Q1/Q3 more difficult to observe than Q2/Q4 and has extra compassion for the frustrations they experience with these interior domains.

---

<sup>3</sup> The Ten Ways is another assessment model used in New Ventures West's Integral Coaching methodology. For more on this model, see my article with James Flaherty, *Integrating Rigor, Compassion, and Creative Design: The Promise of Integral Coaching*.