Designing Self-Observations
A Framework for Integral Coaches
Part 2

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F. Where we observe: the domain(s) of life being observed

"The society which scorns excellence in plumbing as a humble activity and tolerates shoddiness in philosophy because it is an exalted activity will have neither good plumbing nor good philosophy: neither its pipes nor its theories will hold water."
- John W. Gardner

Imagine that you have two clients, Bob and Jill, who both hang out at Eight on the Enneagram and have a habit of yelling at people when they're angry. You design for both people a self-observation focused on the volume of their voice. But there is one difference: whereas Jill has hired you to coach her in her role as a manager, Bob wants to focus on his role as a husband and father. How do we describe this difference?

Bob and Jill are interested in exploring different *domains* of their lives. Jill's primary domain is work. Bob's is family and intimate relationship. Does this mean that Jill only gets angry at work or Bob only raises his voice at home? Likely not. And does it suggest that other domains of each person's life are not worth observing? Again, no. Other domains would likely be very revealing and could be incorporated into the program. After all, the way human beings are in one domain of life is generally how they are in all domains of life. Still, the primary domains that these clients bring to you are different, and this is important to acknowledge.

So, as Jill and Bob's coach, you have a range of options regarding the domains of observation. At one extreme, you might take the initiative early on in the coaching relationship to encourage each person to observe themselves in other domains. You can ask Jill, "Ever get feedback from your family that you talk really loudly? I think that would be worth checking out. Are you open to doing that?" And you can say to Bob, "I wonder if what we're pointing to with the kids might have value for you at work." At the opposite extreme, you can keep the coaching focused on the primary domain unless the client explicitly requests expanding to other domains. There is also a middle path in which you actively listen for commitments and concerns in other domains. When you hear these, you tell the client what you have heard and invite them to explore the other domains—first with you, and then through self-observation.

The imaginary scenario of Bob and Jill highlights two important points about domains of observation:

1. Clients typically start with an assessment that one or two domains is most important.
2. A good coach recognizes this primary domain, sees other domains that might be worth observing, appreciates how open the client is to including other domains in the coaching program, and makes her own assessment of what constitutes an appropriate response.

What, then, are the common domains of observation? The following list is adapted from the set of domains presented in New Ventures West's *Professional Coaching Course*:

- Work
- Friendships
- Family
- Intimate relationship
- Athletic life
- Spiritual life
- Financial life

This is a big list! As a result, even the most experienced coach is unlikely to be coaching clients in all domains at any given point in time. And some of us may not touch upon one or more domains over the course of our entire careers[1]. This is even true for Integral Coaches committed to coaching the whole person. Indeed, it is precisely with domains that we are most likely to specialize in a niche. Why? Because these categories, more than the others described in this paper, are commonly understood and used in our culture. Most adults know the difference between a financial advisor and a sports coach, as well as the distinction between intimate relationships and work. Thus, as coaches, we construct niches using these categories.

The act of creating a niche around one or more domains may seem contrary to the principles of Integral Coaching because we are "leaving something out." But in reality, niching is more integral than either having no niche or creating a niche around words that have no meaning for others. There are two principle ways in which creating a niche around domains is an integral practice:

1. By having a niche, we are including the part of ourselves that needs to make money, the spiritual value of responding to a distinct calling, and the marketing principle that a niche attracts the people we are meant to serve.

[1] Hopefully the domains we coach in are those in which we have some skill ourselves. Similarly, it is wise to avoid coaching clients in domains in which we are incompetent. For example, I don't coach people on how to have sustained happy marriages because I've been married for less than a year myself. And I wonder if there is anyone who coaches people on how to give public speeches about their personal finances. After all, this subspecialty domain combines the activity Americans fear more than death (public speaking) with the topic that is more taboo than sex (personal finances). If there were someone who specialized in this, do you think they would have any clients?

2. Naming our niche in culturally accessible ways includes the critical lesson of Quadrant 3: through language we construct worlds, and some language can be understood more easily in potential clients' worlds than others.

The practical and spiritual benefits of creating a niche explains why many prosperous coaches develop more competence in some domains than others. Indeed, even the domains listed above are broad categories within which we can construct numerous subspecialties. After all, like the Four Quadrants, the domains are a meta-model. Just as there are many powerful sets of distinctions within each quadrant, there are equally valuable distinctions within each domain.

For example, let's consider the domain of work by revisiting the case of Jill. As Jill's coach, you can ask her to observe the volume of her voice not merely at work in general, but within particular dimensions of work. Each of the following dimensions of work represents a subspecialty—or microniche—within the domain of work. Jill can observe herself according to particular

- Relationships: with her boss, peer, direct report, or customer
- Projects: new product launch team, quality task force, women's leadership council, OnBoarding initiative
- Media of conversation: face-to-face, phone, or e-mail

The purpose of subdividing like this is to get Jill curious about how her behaviors compare and contrast across different dimensions of her work life. Maybe she shouts more with peers than customers or more by phone than face-to-face. Such observations can be valuable to Jill in deciding where to focus her attention at work. It also allows you to finely tune future self-observations as well as practices.

A similar deepening of the domain is possible with Bob. You can ask him to observe his vocal volume and tone by family member (wife, older son, younger son, daughter) or by occasion (during day-to-day life, on vacation, at special events, or during crises.) Again, what these observations make possible is greater insight into the subtleties of Bob's experience.

Often it is helpful for people to observe themselves in domains that they normally would not think of as interesting. This allows them to discover how their way of being is—surprise—remarkably similar in different areas of life. On the other hand, it also help them see how they show up differently in some situations compared to others. Both the universality of their way of being and the particularities of each context reveal powerful insights about what makes them tick.

Some people will naturally begin to observe themselves in multiple domains of life without prompting. In other cases, we as coaches can prompt clients to broaden their self-observations by specifically requesting it. More than one client has told me that because they are going on vacation and won't be in the workplace, they won't be doing any self-observing until they get back. This typically brings a smile to my face as I think to myself, "You're bringing yourself with you on vacation, aren't you?" Sometimes I even say this out loud to them.

Of course, there is a difference between inviting clients to observe themselves in a new domain and insisting they do something that feels truly threatening. For nearly everyone, there are certain domains of our lives that we'd rather not discuss with a coach. Rather than see this as a limitation on the coaching relationship, we can use it as an opportunity to build closer relationships with clients. Even if we decide to "not go there," we have learned something valuable about what makes them tick. And by not going there, we convey to clients that we honor their boundaries.

G. How we observe: the "medium" of self-observations

"I wrote a song, but I can't read music. Every time I hear a new song on the radio I think, 'Hey, maybe I wrote that.'"
- Steven Wright

Data reaches clients through different media. The simplest way to break this down is by quadrant. Everyone observes their body and behavior (Q2) and the physical and natural environment (Q4) through their fives senses and their extensions. This is obvious. Equally true but less obvious is that clients' five senses play no role whatsoever in observing Q1 and Q3. To illustrate this point, consider the very definition of "interior" (which both Q1 and Q3 represent). An "interior" is something that no other person can apprehend through the five senses or their extensions (e.g. telescope, microscope). To "see" Q1 and Q3, other people have to engage in conversation with our clients. Indeed, to paraphrase Ken Wilber, the interior domains are not surfaces that can be seen, but instead depths that must be interpreted. And interpretation requires conversation.

In contrast, when we ask clients to make Q2 and Q4 self-observations, they can draw upon viewing and recording devices, as well as other people's memories and current observations. Clients can videotape or audiotape themselves. They can ask others to take pictures of them or keep a journal of what they do and say. They can even ask others to provide live in-the-moment behavioral feedback. All of these act as valuable media for self-observation. Indeed, if clients want accurate observations of Q2 and Q4, drawing upon recording devices and others' five senses can produce data far more detailed than they could gather by themselves.

It is for this reason that the best leadership workshops and classes provide participants with rich sources of real-time behavioral data. I saw this in my first real job after college working for a consulting and training firm. We ran a week-long leadership program for health care executives. Almost without fail, two of the most eye-opening moments were when participants watched themselves negotiating on videotape and received specific behavioral feedback from peers. My company referred to this as feedback, but now I think of it as Q2 self-observation. True, this self-observation was assisted by other people and technology, but it was still self-observation.

Similarly—and around the same time—I had a powerful experience of my own in a public speaking class. Videotape revealed a stark difference in my degree of comfort depending upon whether or not I was using physical props. In a pure stand-up speech, I looked agitated and uncomfortable. In contrast, when preparing salmon salad (on demonstration day), I appeared relaxed and funny. My teacher suggested that when speaking, I at least have a pen in my hand because it would loosen me up. The suggestion made sense to me, and I began to follow it whenever possible.

Is it any wonder that great performers in sports and the arts often watch themselves over and over again on videotape? Have you ever wondered why it is that we do this in sports and arts but rarely in organizations? Again, the great teaching of the Four Quadrants isn't that we should focus self-observations on the interior domains because they have been neglected in the Collapse of the Kosmos. Instead, it is that there is great benefit from increasing the quantity and quality of self-observations in all quadrants.

And the point of distinguishing the media of self-observations is this: just because we ask clients to observe themselves doesn't mean that they have to do this alone. As Pam Weiss, a wonderful teacher of coaches, often says, "We need each other." In my mind, this is as true in doing self-observations as in every other activity in life.

H. When we observe: the "timing" of self-observations

"Comedy is hard in that it's timing, and you have to get the timing down, which requires a lot of revision."
- Richard Russo

There are two questions worth asking about timing self-observations:

- When do we give clients a self-observation?
- When in the course of their day do we ask them to observe themselves?

1. When to give self-observations

The flow of coaching may involve a series of steps, but the timing of these steps varies widely between clients. In determining what to do next with a client, I've found it helpful to continually ask myself, "What will be of greatest service to this person right now?" This question has led me to give self-observations at a variety of times in the coaching relationship. This includes:

- Giving the self-observation immediately after enrolling client in a new distinction
- Waiting a period of time (e.g. a week) after enrolling the client in the new distinction before giving them a self-observation
- Enrolling the client in the new distinction and self-observation in one session and asking them to wait a week before beginning to observe themselves
- Giving a series of self-observations at one time and suggesting a particular order for undertaking them. An analogy is serving a five-course meal at one time and recommending which dish to eat first, second, etc.
- Designing a series of self-observations but only giving them one at a time. Here the analogy is bringing out one dish at a time.

2. When clients will observe themselves

I have found three ways to think about when clients will observe themselves:

- **Triggers.** What triggers a self-observation within any given period of time? Is it a particular activity (e.g. a weekly staff meeting)? Is it the time of day (e.g. 5 p.m.)? Is it a particular type of experience that isn't named as such on the calendar (e.g. a difficult conversation)? Is it the appearance of a particular emotion (e.g. anger)? I think it is easier for most people to observe something that appears on their calendar because this provides a clear starting point for self-observation. The time-of-day trigger works best with clients who are generally conscious of the time of day or use an alarm to remind themselves. It is less effective for clients whose work does not call for close attention to the clock because the trigger never, well, triggers. Even more challenging for many clients is remembering to observe something like a difficult conversation unless they have identified it as such beforehand. Otherwise, the trigger is slowed by the fact that it requires making an assessment in-the-moment (*Is this a difficult conversation?*) Perhaps the most difficult trigger is an interior phenomenon like the emotion of anger because most clients are not tuned into this and lack the witness capacity to start observing when they are aware of it. Sure, they might recall the experience afterwards, but this is more a retrospective practice of journaling than an in-the-moment act of self-observation.

- **Frequency.** How often we ask someone to observe. Once a day? Twice a day? Once a week? How do we decide this?

- **Sequence.** When we give people more than one self-observation (either all at once or one-dish-at-a-time), what is the prescribed sequence? And what criteria do we use to determine this sequence? As mentioned previously, Robert Kegan and Lisa Lahey suggest that people first observe the presence in their lives of an existing narrative ("Big Assumption") before observing when it is ungrounded, much less observing the value of a new narrative. This is just one approach. I am sure there are others, yet I have not heard of them. I therefore consider the sequencing of self-observations to be a research and development area richly deserving further investment.

I. Patience helps…sort of

"In the master's secret mirror, there is an image of the newest student in class, eager for knowledge, willing to play the fool."
- George Leonard

In this paper, I provide numerous examples of how challenging self-observation can be. And I make the case that all of us coaches have an opportunity to support clients through these challenges by designing more skillfully. Nonetheless, I think it is still helpful to remember that all clients experience self-observation as an activity in which they are in over their heads. It is hard work. It is unusual work. And it can evoke as much headache as excellence.

When it comes to self-observation, there truly is no substitute for patience and understanding. Indeed, I think that by struggling to learn to observe themselves, our clients give us the perfect practice of relaxing, trusting, and accepting each moment as it is without praise or blame. Either that or I'm pulling your leg, and self-observation is simply a way to make people's lives more complex while claiming that we're not actually asking them to *do* anything.