Leading, Coaching, and Managing: Which Hat to Wear and When?

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Abstract

Leading, coaching, and managing are similar, yet different. Each is an action that creates different results and will have a different impact, and each requires similar skills, yet each is applied differently. Communication is an example of a skill that is applied differently with each approach. This paper explores each approach using two situations. Individuals and cultures have a natural tendency to favor one type of approach over another. Determining which actions to take is complex and challenging. This paper will explore the pure approaches and the impacts of leading, coaching, and managing. Three factors to consider in selecting an appropriate approach are reviewed. These are: the amount of change, the clarity of the outcome, and the closeness of the outcome. The ability to hold and use what appear to be opposite qualities or conditions is helpful in selecting an approach. Juggling of approaches is required more of middle to senior managers and project managers By being mindful and aware of all three approaches, more possibilities can emerge which result in a wider range of choices being available in the moment or as part of a planned strategy.

Introduction

Leading, coaching, and managing are like walking, running, and skipping – all similar actions, yet different. Each takes you to a destination. Each requires similar skills applied differently. The environment, situation, and your ability determine in a planned or unplanned manner how you use each. Leading, coaching, and managing are actions. Walking, running, or skipping are actions, too, that are done on two feet and move you from one point to another. They require gross motor skills yet, different muscles and movements are used. They can all reach the same destination however the path, the speeds and the level of exertion will vary. Each will naturally attract different followers and fellow travelers. Within the same journey, planned or spontaneous, you can change from a run to a walk to a skip or in any sequence or combination. The change may be based on the weather, road conditions, emotions, or unseen events. Leader, Coach, and Manager are roles and titles, not actions. The role and title imply that each does the associated action. For example, a leader does not always perform leading; at times a leader maybe required to do managing and coaching. This paper will explore the similarities, differences, and impacts of each approach. The goal is to consciously choose leading, coaching, or managing actions, regardless of what a person's title or role may actually be. Considering all three approaches increases the range of possible actions and produces a more holistic solution. Individuals and cultures have a natural tendency to apply and use one approach over another, which limits the outcome. The intent is to apply the most effective approach to any given situation, regardless of whether it occurs in a planned or spontaneous context. Specific suggestions, recommendations, and examples will be used.

Skills: Similar, but Different Approach

We begin to communicate the moment we are born. The level of skill we reach is based on our experiences, culture, and who we are as individuals. It used to be said that leaders are born, not made. It is true that some people are natural leaders, coaches, or managers. Many studies, including the field of Emotional Intelligence, show that leadership can be learned. (Goleman 1995) Coaching and managing are learnable skills, too. In reality, often unconsciously, we adapt and use all three approaches as needed.   Communication is a skill needed and used in all three of the approaches of leading, coaching, and managing.   However the *way* we communicate is what determines if we are leading, coaching, or managing. Most communication is unconscious and we are unaware of the impact we have on others.   Paraphrasing a quote by John F. Kennedy Jr. asserted, "What we are speaks louder than what we say." (Kennedy, 1960). That quote has been proven by many social scientists. One study that is frequently referred to is that of Dr. Albert Mehrabian (Mehrabian, 2012) who determined that when analyzing messages related to feelings and attitudes, only 7% of a message comes through the words themselves, 38% comes from the tone of voice, and a surprising 55% comes from body language – which includes things such as gestures, facial expression, posture, and eye contact. We are largely unaware of our body language and voice tone, yet

awareness and control of these "communicators" are learnable skills. A leader communicates by influencing and motivating followers. Influencing and motivating seem like vague and intangible skills. Yet they are measurable and learnable by making adjustments to body language and voice tone. An example of this can be shown through the skill of an actor. If you watch the YouTube video clip of Don Draper, a character in the television series "Mad Men," you will see him saying the single word "What" more than 30 times. (Mad Men, 2010) Each time he conveys a different meaning through the use of his face, body, and vocal tone. The word itself remains the same. How a person communicates statements and questions using vocal tone, words, body language and listening determines whether leading, coaching, or managing is being employed. Exhibit 1 is an example of a leading, coaching, and managing approach and how they could be used differently, when applied to two specific situations:

Communication Approach	Situation #1 - Team member is late with a task	Situations #2 - Professional athlete performs poorly in a game situation
Leading Inspire and motivate person to achieve task OR change the task – is it an important task?	Passionate plea with voice changes, short sentences, emphasis on the importance of this task to the vision. Body language, gesturing and inclusive language. Measured and calming voice pace.	Do what is right for the team in the long run; what is the legacy that you want to leave for yourself and the team?
Coaching Acknowledge, observe, and focus on person solving their own problem.	No telling or advice giving. The focus is on what is best for them, how they solve the problem, what is their approach. Acknowledge the possible stress, ask questions, listen for them to answer and solve their own problems. Body language and voice may mirror team member or be calming and neutral.	Ask the player what he thinks is the right thing to do in this situation. Offer options to the player. What is most important for the player to do? Non-judgmental. What are the player's values: team, legacy, health, competition, and payback?
Managing Solve the problem, get the task done.	Voice and body are neutral. The focus is on information gathering to solve the problem with or without this team member to achieve the task completion. Instructional and operational "how to" is explored.	Solve the problem of getting better and winning this game. Leave the player in or take him out based on what will win this game.

Exhibit 1 – Communication Approach using Leading, Coaching, and Managing in Two Situations

Each of these approaches has a different impact on the person and situation. Each approach will produce different short and long term results. All three approaches can be used over the course of one discussion. The actual approach employed may be unconscious and in reaction to an event or to emotions. A conversation may start with discovering what this person thinks needs to be done, a coaching approach. Then the conversation may switch to motivating and inspiring them to do what is right for the team or project, a leading approach. Finally you may switch to simply telling the team member what to do and how to do it, a managing approach. The dream environment that can create high performing teams are when individuals, along with short-term and long-term outcomes, are clear, aligned, and support one another.

Communication is a fundamental skill that is applied differently for leading, coaching, and managing. Other skills that are important for each approach, yet have different applications, are planning, relationship building, creating trust, making decisions, and resolving conflict. There are skills that are used by all three approaches but more frequently in an approach, for example listening for coaching; influencing for leading; and organizing for managing.

Being a successful communicator is an important skill for leading, coaching, and managing. The real challenge is which communication approach to take that is best for the people and the situation.

Three Keys to Choosing an Approach

In deciding whether to take a leading, coaching, or managing approach, there are three questions to consider:

1. What is the skill level and general tendency of the individual?
2. What is the impact of using each approach?
3. What does the situation need now to reach the desired outcomes?

Most people and cultures favor one approach over another. Using another approach feels alien, unnatural, and uncomfortable. Time and experience are the ways we learn to adapt and use different approaches. "Leadership voids" or "poor management" or having the sense that "with a little coaching, things would be better," are symptoms of the wrong approach being used. The situations and jobs people are in frequently reflect their natural aptitude. A natural leader is attracted to version 1.0 of projects and entrepreneurship. A natural manager is attracted to the organizing and controlling aspect of project management. Leaders attract change; coaches build trust and deep enduring relationships; and managers strive to create order and organization in their lives and careers. The middle manager and project manager jobs, that by their nature of being in the middle, require more frequent switching between approaches. In general, Leading is the domain of senior positions and entrepreneurs. Managing is the domain of first level managers. In my practice I coach middle level managers. Frequently the underlying issue is a mismatch between a person's natural approach and what the job requires. Middle managers grow into the role and may be stuck, or never progress, simply because leading is an activity that is new to them and one that they must learn. When it is clear what a person's natural ability and approach are, then a conscious choice can be made to either grow into the other areas or delegate it to someone else who is strong with that approach.

Pure Leading

A leader is one who leads and pursues the activity of leading. Leading is guiding, directing, or influencing. Leading takes you and others places no one has been before. Leading involves change. A leader delivers on a vision, owned by themselves and followers. Frequently the specifics of how to achieve the vision are unknown, unclear, and have never been done before.

The work of leading is about change – recognizing, articulating, and motivating others towards a new direction. **"Leadership is a reciprocal relationship between those who choose to lead and those who decide to follow."** (Kouzes & Posner, 2002), *From* the work of John Kotter (Kotter, 2001), the categories below are activities of the Leader:

- **Motivating and Inspiring**: energizing people to overcome major political, bureaucratic and resource barriers
- **Aligning People:** communicating the direction by words and deeds to all in order to create a team that understands the vision and strategies and accepts them
- **Establishing Direction:** developing a vision of the future and strategies for producing the changes needed to achieve it
- **Promoting Change**: developing the potential to produce useful changes

An ongoing study over many decades and cultures from *The Leadership Challenge* by Kouzes and Posner, indicates that consistently worldwide these four attributes are always over 50% of what people want their leaders to be:

- Honest
- Forward Looking
- Competent
- Inspiring

Leaders and Leadership are revered, hated, and worshipped worldwide. The path to becoming a leader and strategies for how to lead vary. There are multiple and conflicting profit and non-profit organizations and societies worldwide that teach leadership. Leading involves change and frequently deals with the unknown.

Pure Coaching

A coach is a person who engages in the act of coaching. The International Coach Federation, ICF, defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. (ICF, 2012, Coaching FAQ, Paragraph 2) goes on to state that, "Coaches are trained to listen, to observe and to customize their approach to individual client needs. They seek to elicit solutions and strategies from the client; they believe the client is naturally creative and resourceful. The coach's job is to enhance the skills, resources and creativity that the client already has." (ICF, 2012, Coaching FAQ, Paragraph 3) The coaching profession worldwide is in its infancy and growing. The industry has reached the 2 billion USD number. (ICF, 2012 Global Coaching Study, Paragraph #1) Coaching as a practice is not regulated. Standards are set and there is certification of coaches by the International Coach Federation. There are many forms of coaching – life, business, executive, health, and career, as well as hundreds of schools that teach coaching. Recently a handful of universities now offer a masters degree in coaching. Coaching has been equated with personal training. Coaching can be a powerful approach in helping identify and achieve a client's goals, objectives, values and vision.

Pure Managing

A manager is a person who manages by handling, providing direction, or control. The actions of a manager are to control and solve problems, organize and staff, plan and budget, promote order and stability. A project manager delivers the project objective. A manager delivers on a known objective. Taking again from the work of John Kotter (Kotter, 2001) Managers perform these activities:

- **Planning and Budget**: establishing detailed steps and timetables for achieving results and then allocating the resources necessary to make it happen
- **Organizing and Staffing**: establishing a structure to accomplish plan requirements, staffing that structure with people, delegating authority for carrying out the plan, providing policies and procedures to guide people, and creating methods or systems to monitor implementation
- **Promoting Stability and Order**: developing the potential for consistently producing key results
- **Controlling and Problem Solving:** monitoring results in detail, identifying deviation from the plan, and organizing to solve these problems

Managing as a skill is taught and learned in many forms. General supervision and management is taught by the American Management Association. Industry specific management is taught by various organizations. Project Management Institute is a non-profit worldwide organization for learning the tasks and skills of managing projects. Managing deals with controlling and solving problems for known goals and objectives.

Key 1: Putting it together – Ability and Strengths

Leading, coaching, and managing are different. Each has a different focus, approach to change, range of relevant activities, and relates to others differently. The first step in selecting which approach to use is awareness of your natural skills. A person's natural ability and strength are usually fairly apparent by reviewing the pure application of leading, coaching, and managing. It is easier and often an unconscious choice to apply and use your natural abilities which, if not expanded, limit the possibilities for effective solutions. This is how people get stuck in a role or job or at certain level, by applying the same approach over and over to situations that are new and might benefit from a different approach.

If not skilled in a particular approach, there are two choices for how to proceed. The first is to learn and practice and become skilled in the other area. The second is to ask the help of someone who may have that needed skill. An example of this was with a project manager who because of her amazing project organizing skills was selected to run a company-critical project. Significant politics and resistance surrounded the project. Her strength was not in

influencing and motivating and time was short. She did want to learn how to expand her skills, but needed immediate motivation for her team which was collapsing due to the external resistance and pressure. She asked her sponsor, who was a known motivational leader, to attend her weekly team meetings. Her flexibility to bring in someone who already possessed the needed skill allowed the project to be delivered successfully. Exhibit 2 describes the differences in the pure approaches.

Leading Approach	Coaching Approach	Managing Approach
Target and Focus: Vision, longer term outcomes which may be unknown and with details not yet clear	**Target and Focus**: Other person and his or her known or unknown desired outcome, achievement, goal, or vision	**Target and Focus**: Known outcome, goal, objective, or project
Activities: Motivates, inspires, aligns, establishes direction	**Activities**: Facilitates learning, builds strong, open, non-judgmental relationship with other; observes and gives feedback	**Activities**: Controls, problem solves, organizes staff, plans and budgets, monitors and reports
Change: Creates it; can be a chaotic environment	**Change**: Challenges and supports others to change status quo; can be a chaotic environment	**Change**: Brings order and stability to status quo
Others: Followers Influences, inspires and motivates them	**Others**: Partners Facilitates the process for others to find their own answers	**Others**: Subordinates, staff, team members Directs, instructs, tells them

Exhibit 2 - Pure Leading, Coaching, Managing Approaches

Key 2: Impacts of Leading, Coaching, Managing

Each approach has a different impact and different results. In reality a person will adapt and use multiple approaches. Rarely is one approach exclusively used. A classic time management story tells about the person who spends their life climbing the corporate ladder by doing what was expected. When they reached the top of the ladder and looked around and saw where they had arrived, it was not where they wanted to be. Because the person had never looked at a long-term vision or done the work of leading, they had spent their whole career managing the next short-term goal; hence, they had climbed the wrong ladder. For some, it is hard and takes courage to stop and reflect, ask, and answer the questions, What ladder do I want to move forward on? Where is the ladder I am on now taking me? All three approaches need to be considered and used at different times. New coaches are taught pure coaching at first. The first four coaching courses I taught were pure coaching. Pure coaching instructs student coaches to remove themselves from the equation, to hold in abeyance all their assumptions, judgments, and opinions and to not give any advice. It sounds easy, but is hard to do. Master Coaches doing pure coaching make it look like magic and can create amazing breakthroughs and results. Exhibit 3 describes the kind of impact using each approach in its purest form can have.

Impacts of Leading	Impacts of Coaching	Impacts of Managing
Movement; achievement of a vision or direction	Clarity and achievement for others in values, goals, vision, direction	Achievement of a task, milestone, goal, project, objective
Stressful due to changes and unknowns	Stress is on other to change and achieve	Less stress due to control and organization
Higher risk, higher reward	Personal risk	Risk is calculated and planned
Paves the way, for things to become organized	Structure and organization is based on desired outcomes of	More organized and efficient

	the other	
Aligned and focused on longer term unknowns	Alignment and focus expanded by coach of other's known or unknown goals or vision	Aligned and focused on the shorter term and the known
Processes are high level and pave the way to creating known strategies, goals, and objectives	Processes are adapted and used or discarded based on the other's desired outcome	Processes streamlined to achievement of known task, milestone, goal, project, objective
Learning is at a system organizational, model level; principles, values	Coach learns about what works or not for other; other learns about self	Learning is about application and process to achieve task, goal, project, objectives
Results appear intangible, though can bring long term and lasting changes	It is an investment and takes time; results should be sustainable	Results are immediate and may or may not be sustainable

Exhibit 3 – Impact Effects of Leading, Coaching, and Managing

Key 3: Desired Outcome from Three Variables: Change, Clarity, Closeness

The clearer the desired outcome the easier it is to pick an approach based on the situation. The more change required to achieve the outcome is also a factor in determining the approach. The relative "distance" of the long term outcome typically means fewer specifics are critical now, and this is the third factor in determining the approach. When the amount of change, the clarity, and the closeness of the outcome are all known, then it is easier to select an approach. Consider the two situations from earlier, those of a team member's task being late and a top athletic performer not performing. For each situation consider:

- How clear is the outcome?
- Which level of outcome is most important – short term, medium term, long term?
- How much change is required?

In general, the closer to vision the outcome is and the more change required, the more leading is needed. If the desired outcome is unknown, coaching is required. If the desired outcome is clear and close, a managing approach may be best. The best case is when all the levels of outcome are known and aligned and the actions support each other. The challenge is in balancing the tradeoffs and the impacts and potential outcomes of each, as can be seen in Exhibit 4.

Outcome Level	Situation #1 - Team member is late with a task	Situations #2 – Professional athlete performing poorly in a game situation
Task	Must complete the task	Must win that play
Milestone, or Inning or Period, Quarter	Must complete the milestone	Must win that Inning or Period or Quarter
Project or Game	Must complete the project	Must win the game
Program or Season	Must deliver the program	Must win the season
Vision	A company that gives back to the world, creating high quality products in an ethical way, while treating people fairly.	A team with a legacy of honesty and integrity that always makes the right moral and ethical decisions

Exhibit 4 - Sample Outcome Levels

Win the War, and Lose the Battle

If the most important outcome is being certain than an organization is creating an ethical legacy, a decision to not play a sports superstar who was just convicted of a serious crime would be justifiably made. The team may end up having a losing season, but the legacy they leave behind will remain intact. In that moment of a game when the player's skill is needed, a leadership approach is required to inspire and motivate and remind people of the larger vision that the legacy is most important. The game may be lost but the legacy remains intact. The reverse might be true for an important task on a project. If that task is the most important outcome, then solving the problem is done no matter what the cost. Frequently in start-up organizations, this kind of focus is justified with statements similar to this, "Do whatever it takes to get it done, so we can live to fight another day."

Change is the territory for leading, status quo for managing, and the unknown for coaching. The more change required to achieve the desired outcome means more leading. A way to measure the amount of change is to categorize the current situation by what is new and different in these four areas: people, technology/tools, processes, and content expertise. It is also significant to rate the amount of newness from the immediate person's perspective, as well as the project's, the company's, and the industry's. In general, the further away one is from an outcome, and the more change is required in achieving it, the more leading is required. The less change required to deliver the outcome, the more a managing approach works. And if the outcome is unknown, coaching may be required.

Juggling Effectively: The Use of Mindfulness

Leading, coaching, and managing are very different actions. Juggling all three requires skill. The ability to recognize and make these tradeoffs is complex and challenging. Mindfulness and accepting what appear to be opposites are two methods for making better choices. Successfully being able to juggle all three will create a system-level solution.

Mindfulness, defined by attentive awareness of the reality in the present moment is a skill that can be learned. It improves the ability to make better and more holistic choices. Middle managers and project managers frequently, both in planned and spontaneous circumstances, are required to have this juggling skill. They interact with many diverse functions and work at producing different levels of outcomes. Being mindful allows observation to be done non-judgmentally and without assigning any immediate subjective assessment. In the moment the situation is not defined as good, bad, hard, or easy: it just is what it is. Mindfulness allows the objective observation of one's own emotions and senses. It allows the flexibility to enter a problem-solving mode and choose from among the best actions rather than being stuck in reflexive mental habits or emotions. This is not to say that cultivating mindfulness suggests that the emotions and feeling be denied, repressed, or ignored. Rather, at that moment of decision, to observe them and allow action from less constrained, more expanded choices to proceed first. It is similar to being in an emergency situation and being able to choose to do life-saving actions now and deal later with the emotional impact of the event. Mindfulness in that moment of choice expands the possibilities of action. There are many ways to learn to be more mindful and individuals can benefit greatly by finding out what works for them.

By initially accepting what can appear to be opposites allows for a more comprehensive solution. Being willing to lose the game to win the season is an application of this strategy. By losing a game, it may place a team in a different playoff spot that allows them to subsequently win the season. Inspiring, telling, and listening to a team member who is late with a task may be the best approach. Instinctively, many managers use all three approaches, leading, coaching, and managing. Including and embracing what appear to be opposites can create a solution that includes multiple approaches. Being able to hold, examine, and include opposites requires "AND" thinking. The following are examples of where conditions of contradictions exist and inclusive thinking is needed to reach a holistic approach.

- Manage the *big picture* AND the *details*
- *Innovate* and be *creative* AND maintain *stability*
- Be *hands on* AND *hands off*
- Encourage *individuals* AND emphasize the *team*

- Be *flexible* AND *firm*
- Be *loyal to the team* AND *loyal to the organization*
- *Leading* AND *coaching* AND *managing*

Summary

Leading, coaching, and managing are similar, yet different. Each is an action that creates different results and will have a different impact. Each requires similar skills, such as the ability to communicate effectively, yet these skills are applied differently in each approach. Individuals and cultures have a natural tendency to favor one type of approach over another. Determining which actions to take is complex and challenging. The amount of change, the clarity of the outcome, and the closeness of the outcome should be considered in deciding. By being mindful, more possibilities emerge which allow for a better range of choices in both planned and spontaneous circumstances.

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