

An Approach to Coaching on Presence

*Lessons learned from Presence Coaching Program
by Teresa Woodland*

Professionals create results by influencing others. To do this they need presence. Professional service firms struggle to help their people develop presence.

What exactly is presence? Is it a skill? A personality trait? Are people born with it or can it be taught? How does one develop it? Can the process be accelerated? If so, how?

This document codifies lessons I learned helping management consultants in Asia develop presence. It lays out a definition of presence and presents how the elements of presence translate into development levers. The following two disguised case examples illustrate my approach to assessing presence issues and designing development programs:

- ¶ Susan, a junior partner in a leading management consulting firm, was a distinctive problem solver and a strong team leader. She had strong credibility with clients in the context of engagements, but was finding it challenging to create counseling relationships with senior executives. Although she had presence when discussing recommendations with CEOs, she lacked it in clientele development meetings. She also struggled to assert herself when partners participated in CEO meetings. The partners Susan worked with typically did most of the talking, although she generally had a better command of the material and a better understanding of the client organization and issues. Finally, she was hesitant to raise new topics with senior executives.
- ¶ Frank was a strong business analyst who had creditability issues with engagement directors/partners (ED) because of his inability to answer questions without long explanations. EDs felt he was too bogged down in the details and couldn't see the big picture. He repeatedly got feedback to assert himself more in problem-solving sessions and to be more top-down in his communication. In team meetings without EDs, he had no problem discussing his work.

WHAT IS PRESENCE?

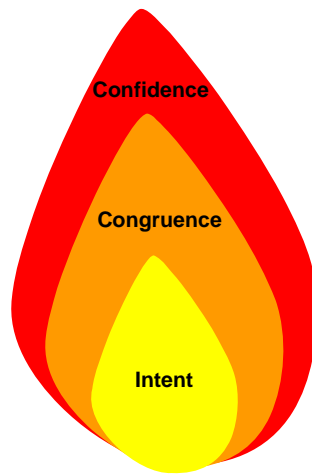
Most definitions of presence focus on the impact generated by those who have it. People who have presences are said to “fill the room,” “command attention,” and “make you sit up and listen.” Often, presence is contrasted with charisma, which connotes the ability to command attention but also suggests a lack of depth.

People working on developing presence need a concrete definition of what *gives* a person presence so they can define their aspirations and assess their competencies. “You know it when you see it,” is not helpful to someone who “doesn’t have it.”

I believe people have presence when their outer behavior and appearance conveys confidence and authenticity and is in sync with their intent. The three-part flame graphic below illustrates this definition.

- ¶ **Intent**, the bright inner core of presence, encompasses both aspirations and personal reality (e.g., self-image and self-confidence). Intent varies by situation, relationship, and role. This explains why someone who had presence as a project manager can struggle with presence as a project leader and why someone who has presence when alone with clients might have less presence in front of superiors.
- ¶ **Confidence** is what people see, i.e., the tangible exterior of presence. It is based on knowledge, capabilities, and behaviors. Because these things can be learned, they are the focus of most work in developing presence.
- ¶ **Congruence** binds the exterior and interior elements of presence. The synchronization is key to projecting authenticity and differentiating presence from charisma.

THREE ELEMENTS OF PRESENCE



Source: Stauduhar, Woodland

- Fill space
- Remain centered amid action
- Act decisively
- Project passion for views, ideas, capabilities, and feelings
- Be genuine and authentic
- Synchronize message, body, language, projected emotions, and energy
- Act in accordance with espoused values
- Desire to be here and to be in the moment
- Desire to dialog with audience – reaching out, listening holistically, and being impressionable
- Understand what you have to offer and what you stand for

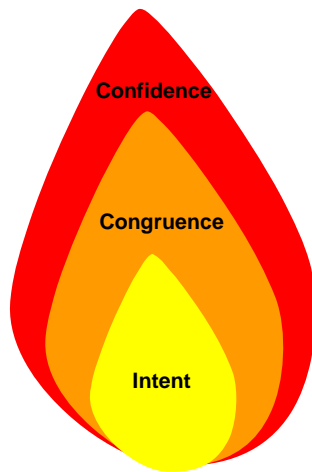
1

TRANSLATING THREE ELEMENTS OF PRESENCE INTO DEVELOPMENT LEVERS

Creating lasting improvements in presence requires working simultaneously on the three elements. In addition, to embed changes and embody improvements, people need relevant work-based exercises that focus on building skills, increasing self-awareness, and modifying mindsets.

The three elements of presence correspond to three interrelated development levers. *Intent*, the inner core of presence, corresponds to goals, values, and mindsets. *Confidence*, the exterior element of presence, can be built by strengthening body language, eye contact, vocal variety, and other physical skills, as well as by building expertise. *Congruence* is a function of perceptiveness, awareness, and courage.

THREE LEVERS FOR DEVELOPING PRESENCE



Behaviors, capabilities, and knowledge shape your ability to authentically express yourself and engage others

Awareness and sensitivities – what you notice and pay attention to externally and internally (e.g., self-image, conflicts) – shape how you translate intent into actions. Increasing perceptiveness is the key to reducing conflict between external behavior and inner core.

Goals, values, and mindsets define your engagement and set the emotional tone with which you interpret the world and act. Projecting the essence of these elements deepens authenticity. Transforming these elements opens possibilities.

Source: Stauduhar, Woodland

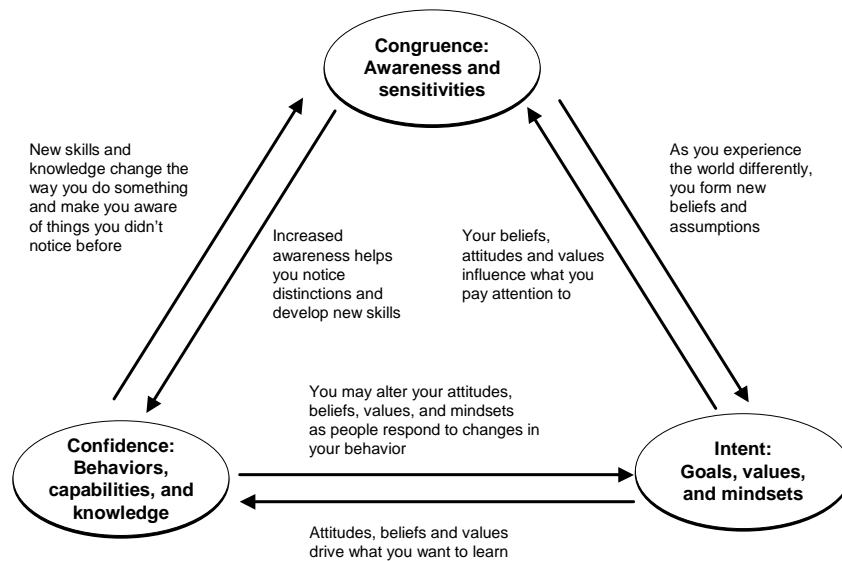
2

Because most presence programs focus on either the external or the internal elements of presence, they have limited long-term impact. Short-term skill improvements acquired in training programs often fail to gain traction and dissipate if they aren't accompanied by heightened self-awareness and continued reinforcement. Programs that focus on intent (e.g., discussion-based workshops) help people clarify goals, values, and mindsets. They raise people's awareness of issues and mindsets, but don't help them develop the competency to change behaviors and skills.

Addressing all three development levers enables people to form a holistic understanding of their issues. Pursuing an integrated approach (e.g., addressing interior and exterior elements plus the congruence between the two) helps people develop the skills and self-awareness necessary to become self-correcting and to move from conscience competence (or incompetence) to unconscious competence. (See Appendix I for a detailed explanation of Maslow's conscience competence model.)

Working simultaneously on all three elements of presence creates a virtuous cycle of interpersonal skills development, which is illustrated in the following chart and through the example below.

INTERPERSONAL SKILLS DEVELOPMENT DYNAMICS



Source: Woodland

3

One coachee aspired to become a better listener (**confidence**) to strengthen his relationships with clients and colleagues (**intent**). He had little self-awareness of his behavior in conversations (**confidence**) – specifically, that he rarely let anyone finish a sentence – and the values that this behavior suggested (i.e., that he wasn't interested in others' opinions). As he became more aware of the impact of his behavior (**congruence**), his behavior naturally changed (**confidence**). As he stopped interrupting people and pushed himself to respond to their contributions instead of restating his points, he began to appreciate their insights (**intent**) and noticed they contributed more (**congruence**), which helped him to listen more and talk less (**confidence**). This improved the quality of the interactions and strengthened the relationship.

ASSESSING PRESENCE ISSUES

In my initial assessment conversations, I strive to understand three things:

1. **What success would look like?** In what specific situations or relationships does the person want more presence? How would the dynamics and outcomes of those interactions change as a result?
2. **What is their current reality?** I use the presence model to explore where the person currently is, externally and internally; what they are paying attention to, within themselves and in others; and how they think about improving their presence (and what has and hasn't worked).

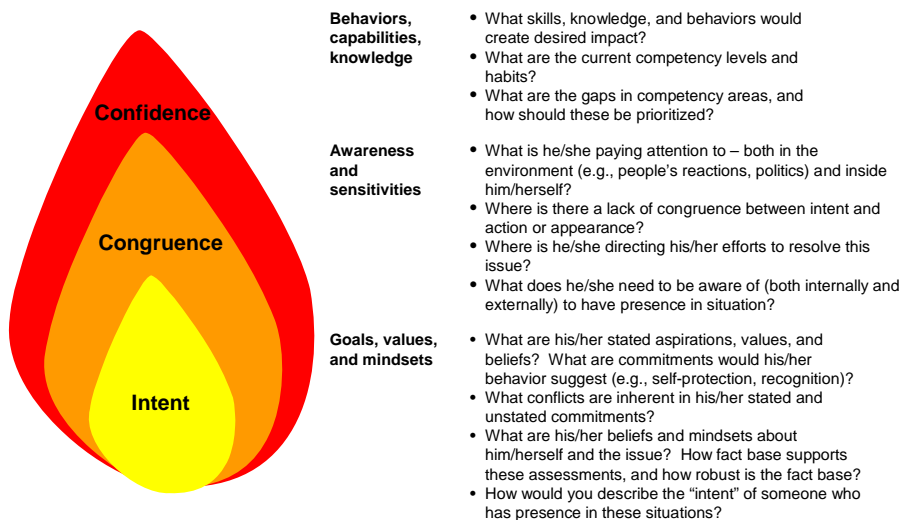
3. **What are the real issues?** The key to lasting improvements is addressing the root causes of issues. With presence, people focus on exterior elements, which are often merely symptoms or manifestations of core (interior) issues that are harder to identify or articulate.

A non-presence example illustrates how symptoms can be differentiated from core issues. Occasionally, clients ask consultants to participate in a “consultant panel” or a competitive bid process. These same clients may also request extensive documentation and oversight in a consultant’s work. While it is essential to respond to these requests, consultants need to recognize that these are symptoms of underlying problems, usually a lack of trust or unclear understanding of what will produce results. Only by addressing the core issues (e.g., strengthening trust, increasing collaboration) can consultants create lasting improvements.

I use the presence framework to structure the output from the assessment. The chart below illustrates the questions I try to answer for each element.

The confidence element is the easiest to assess and address. This explains why most presence work focuses on skills and behaviors. However, for most coaches, the core issues are intent (e.g., conflicting commitments or mindsets) and congruence (e.g., low self awareness, insensitivity of the impact of their behavior on others).

ASSESSING PRESENCE ISSUES – QUESTIONS TO ANSWER



Source: Woodland

5

These conversations tend to be a fluid exploration of all three areas. I use deep-structure-like questioning techniques to uncover core issues. I generally start by

having the consultant articulate specific aspirations and then explore his or her intent, move to behaviors, and try to get a handle on “congruence.”

After I have gained a decent understanding of how the issue is manifested across the three elements, I begin to develop and test hypotheses, explore blind spots, and understand conflicting commitments (e.g., to keep client executive happy and to raise hard issues). At the end of this, I want to have a clear understanding and agreement on priorities for each area.

Susan’s assessment

In my initial conversation with Susan, I explored her aspirations for having counseling relationships with CEOs, where she thought she was, and what she perceived the barriers to be.

Susan was quite comfortable with her ability to engage CEOs around issues within or related to specific engagements. She was confident that she added value in these conversations. She had insight into several other issues that should be on the CEO agenda, based on work she had done with this client, but she hadn’t shared any of this.

Susan had not done much thinking about her aspirations for moving client relationships beyond a short-term focus on individual engagements. Rather than articulate her desires for these relationships, she echoed feedback from her semi-annual review. In addition, her mindset kept her focused on being a consultant with the answers (e.g., “clients want us to focus on the questions they asked”) rather than a trusted thought partner with whom to explore hard issues and new areas.

Susan acknowledged that deepening the relationship would involve expanding into uncharted territory. She was afraid she couldn’t add value without having the answers, a perspective which contradicted the leadership team’s view of her potential. When pushed, she was able to admit her view might be flawed. She acknowledged that in conversations with colleagues about issues facing the client she had valuable insights. This made her curious about other ways that her assessment of her ability to add value might be false and holding her back.

Susan also had not worked on building the perspectives necessary to move her senior executive relationships beyond engagements. She had good industry knowledge and understood the client organization well, but she had not thought deeply about what the CEO’s agenda should be. She also didn’t know the CEO well as a person.

In addition to needing to identify issues to raise with the CEO, Susan needed to strengthen her interpersonal communication skills. Susan measured success based primarily on external feedback, which led her to focus on answering clients’

questions rather than challenging them. Because the client's performance was poor on multiple fronts, Susan knew that she would should be discussing many negative things. She wasn't sure she had the necessary interpersonal skills. She also used cultural issues to build a strong case for avoiding difficult conversations.

Susan's lack of self-awareness was her biggest barrier to having presence. Although she didn't have much experience initiating difficult conversations with clients, she handled things well when there was a conflict. Her challenge was that when she raised new and often difficult issues, clients reacted to the hard messages, which made Susan uncomfortable. Another challenge was that her self-assessments were not fact based. When I asked her how she assessed her performance in situations I observed, she couldn't give an objective evaluation or explain what she did or didn't do that contributed to her impact on others. In other cases, she insisted she didn't do something well (introduce a different point of view), but when pushed for a specific example, she admitted that she had never actually tried it.

Finally, Susan was not perceptive about others and did not have sophisticated organizational listening skills. When we discussed how to gauge how fast or hard to push a person or organization, Susan couldn't list potential indications of saturation. She confirmed my hypothesis that she often erred on the side of not pushing people hard to change, though she had a reputation for pushing teams to produce and perform. She also did not have a good understanding of the political and organizational challenges the CEO was facing.

Frank's assessment

To assess Frank's presence issue, I first needed to understand if this was an inability to synthesize or a communication style issue. I questioned him about his current engagement to explore his ability to synthesize and think on his feet, and found he did both well. When we discussed how he felt about the exercise, he revealed that he was uncomfortable because the answers he gave me were only 80 percent correct. He then launched into a long explanation about the process and extenuating circumstances, the exact behavior his project leaders complained about.

After listening to copious details, I suggested that he was wrestling with a perceived conflict between giving a top-down answer and showing that he was buttoned up. As we discussed this further, we realized that he wasn't sure how to indicate a degree of certainty in an answer (i.e., "Right now we think the answer is 8,000/unit, but if our assumptions about competitors turns out to be off, it could be as high as 14,000."). He also didn't understand how to "talk through a pyramid" to satisfy an audience (i.e., let them decide what was enough).

DESIGNING PROGRAMS FOR DEVELOPING PRESENCE

Designing development programs is both art and science. The best programs use and link all three elements of presence, prioritize and sequence learning, and include cognitive work (which is generally easy for consultants) with exercises to challenge their assumptions and their views of themselves.

As I wrap up an assessment interview, I usually give coachees something to get started on – an article, book, or exercise to expand their “intent” and a simple exercise or tool to help them develop knowledge or capabilities in a specific area. This keeps them engaged while giving me time to let their assessment “incubate.”

Developing presence is hard work because whether people succeed or fail, their image of themselves changes. I’ve been surprised to learn that succeeding is just as hard for most people as failing. Success requires that they ascend to a higher level of presence – that they begin to think of themselves as a peer and a counselor to someone that used to seem beyond them.

Given that the major challenge is getting people to adjust their self-image, I usually start with a self-observation exercise that helps a person gain an objective view of their skill level, begin to challenge assumptions, understand what is happening inside of them, and note what they are paying attention to. In designing and explaining these exercises, I include detailed instructions on how to conduct a rigorous self-assessment (i.e., achieve objectivity) that will create a robust fact base. In addition, I try to couple self-assessments with a skill- or knowledge-building exercise so the coachee feels like he or she is doing “real work.”

Since I began presence coaching after many years of designing training program for these consultants, I was able to rely on existing materials for skill development (e.g., clientele development discussion training, synthesis exercises, role plays) and focus on designing techniques to help people assess the impact of new behaviors. Generally, these assessments involve a series of questions they ask themselves and others who give them targeted feedback, (e.g., “Please give me feedback on how I introduce new topics in this meeting”). See appendix II for examples.

In subsequent coaching conversations, we would review progress and results, tracing interconnections along the development cycle presented above, and then talk about how to make the new part of their normal mode of operating.

The following examples illustrate how I incorporated presence coaching into real work for Susan and Frank.

Susan’s presence development program

I left my meeting with Susan thinking, “Where do I start?” Because she was keen to start working right away, I decided to give her some reading material to help her articulate her intent (i.e., *The Trusted Advisor*, by David H. Maister). That afternoon, I also wrote a list of questions to help her crystallize her thinking on a CEO perspective.

In our next meeting, Susan and I discussed *The Trusted Advisor* and together we crafted the bullets listed under “intent” in the chart below. She also articulated a compelling CEO perspective and we talked about how she might find answer the remaining questions and begin to initiate counseling discussions. In addition to discussing how she might introduce new topics in client update meetings, we talked about tactics for expanding the relationship those meetings.

Having gotten a good start on the *confidence* and *intent* levers, I designed several exercises to help her increase her awareness and sensitivity (see Appendix II). These self-observation exercises were designed around the action plan she had outlined to engage the CEO she was currently serving. They helped her develop a robust fact base about how she did and how she felt as she took risks in expanding the relationship.

At the end of our second conversation, Susan and I referred to the three elements of presence to plot her aspirations and things that she would work on to develop presence.

DEVELOPING PRESENCE EXAMPLE – GOALS FOR AP COUNSELING A CEO



Source: Woodland

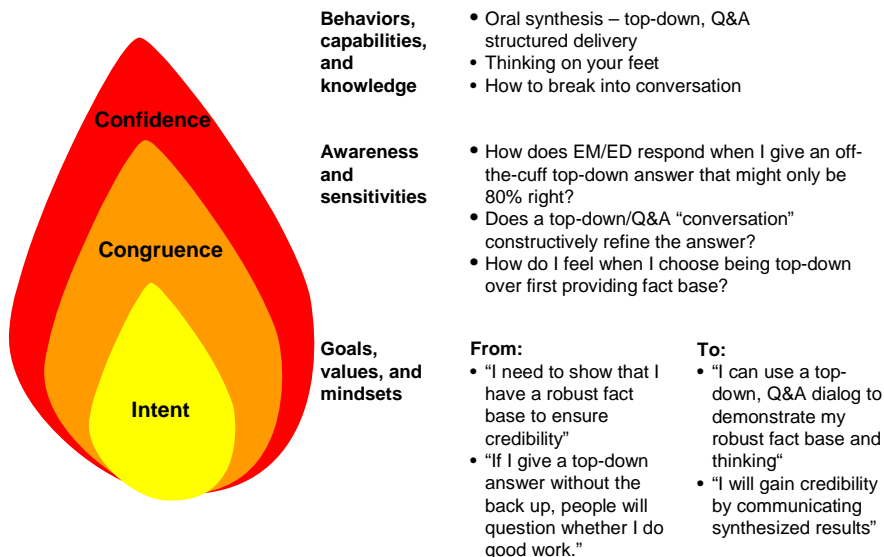
Most of our follow-up sessions involved Susan sharing her attempts to deepen the counseling relationship. We discussed her performance, building a concrete fact base to ground her assessments. “I did this. It felt awful, but he responded really well to it. I was very nervous in the beginning of the discussion, but as we got into the topic, I relaxed and we ended up having a great discussion.” Or, “I didn’t think the conversation went well, but two days later he brought up the topic again and we got into some meaty issues.” This fact base gave Susan the confidence to take further risks.

In addition to reviewing Susan’s growth and progress, we discussed additional skills she wanted to work on and discussed ways in which she was resisting change (e.g., avoiding risks, not doing assessments after meetings, not seeking or responding to feedback). Initially, I felt awkward pushing, but I learned that the key to being a supportive coach was understanding how to adjust the program and approach to each coachee. In Susan’s case, she didn’t want an easier program; she wanted someone to push her when she slacked off.

Frank’s presence development program

Uncovering Frank’s conflict between giving a top-down answer and appearing buttoned up was a major breakthrough. At the end of the first session, we worked together to articulate his issues around goals, as illustrated in the chart below.

DEVELOPING PRESENCE EXAMPLE – COMMUNICATING TOP-DOWN



Source: Woodland

Rather than develop a detailed program, I had him practice techniques for expressing his degree of certainty. In addition, we talked through how to break into a conversation.

To make this learning stick, I e-mailed Frank a short self-observation exercise (Appendix II). We discussed this briefly over the phone later in the week, and reviewed his progress when we met in the halls.

* * *

As I said in the introduction, this document seeks to codify lessons I learned helping people develop an amorphous but powerful quality. I would welcome a chance to learn from your efforts. I'd also appreciate your comments, feedback, and questions on this approach. You can contact me at wudelan@global.t-bird.edu

October 31, 2006

TERESA WOODLAND (伍德兰)

Teresa Woodland is the founding principal of WuDeLan Partners, a management consultancy that helps organizations in China strengthen their leadership talent and organizational capabilities. Teresa has been helping individuals and organizations in Asia and the U.S. perform to their best ability for more than 20 years. She has extensive experience in change management, business strategy and execution, organizational communication, teaching, and professional and organizational development.

APPENDIX I: MASLOW'S CONSCIOUS-COMPETENCE FRAMEWORK

Abraham Maslow (1908-1970), a psychologist, developed a four-step framework to explain how people develop new skills. Below, the example of driving a car* is used to illustrate how people move from unconscious incompetence to unconscious competence.

MASLOW'S CONSCIOUS COMPETENCE FRAMEWORK

UNCONSCIOUS INCOMPETENT <ul style="list-style-type: none">• You don't know that you can't do something	CONSCIOUS INCOMPETENT <ul style="list-style-type: none">• You know that you can't do something
UNCONSCIOUS COMPETENT <ul style="list-style-type: none">• You do something without thinking about it	CONSCIOUS COMPETENT <ul style="list-style-type: none">• You can do something when you think about it

Before people learn to a skill, they are *unconsciously incompetent*. They often have no real concept of what is involved. For example, driving looks simple when done by someone who is experienced. When they first begin driving, they realize that it isn't as easy as it looks. They may have some difficulty steering or backing up or braking and they are aware that they are having problems. They are now *consciously incompetent*. The more they practice their driving, the better they become at it. However, they are still very aware of what they are doing. They might even begin by going over in their head what they need to do – turn on the ignition, put the car in reverse, etc. They are *consciously competent*. Usually, at this point, they get their driver's license. Finally, they drive so much that they often go 10 miles without conscious awareness that they have even backed out of their driveway. At this point they are *unconsciously competent*. Driving skillfully is a habit.

* Adapted from PWI faculty manual, pages 64-65.

APPENDIX II: COACHING EXERCISES

Please note: these samples are real exercises, not *ideal* exercises. I have learned a lot since I wrote them and would not reuse them without revising them (in some cases, fairly significantly). I am including them because I believe they might be useful.

The first two were used with Susan, the AP. The third was designed for Frank, the BA who wanted to be more top-down in his communication. The fourth was developed for another consultant who needed to become a better listener.

Coaching exercise: Developing CEO perspective

Objective

To articulate a perspective on a CEO you serve/hope to serve.

Instructions

A. For each of the clients you aspire to serve, answer the following:

Who is he/she?

1. What is this person's background – education, work experience, relationships? How does this affect his/her career?
2. What is this person's time frame? What's his/her short and mid-term business agenda? Where is this person in her/his career? What is his/her goal for this stage of his/her career/legacy? What will it take for the person to move to the next stage?
3. What is this person's style –working, leadership, communicating? Risk tolerance? MBTI type? How does he/she prefer to learn?
4. Who influences this person? Who does this person admire? What does this person value in an advisor?

What are his/her top issues?

1. What are the top business concerns for this company? For this executive? How would the other members of his/her team answer?
2. What threats and opportunities face this company? What are the forces at work in this industry? How will these impact the company? What changes in **other** industries will affect this company? How should the CEO be thinking about these?

3. What lessons learned from other industries, geographies, or companies can be applied to this company (e.g., corp. governance)?

What is his/her environment?

1. What is the structure in which this person operates? How much freedom does he/she have? How much power? Who is he/she accountable to? What constraints does this person operate under? Who makes decisions about this person's career?
 2. What are the core values and operating principles of this company?
 3. What are the barriers and challenges this person faces trying to create impact within his/her environment? Where are the strengths and weaknesses in the organization?
 4. What do we know about his/her organization that we should share? What are our recommendations for how to address these things?
- B. What questions couldn't you answer? How will you get the answers you need?
- C. What are the implications of these answers for how we serve this client – both what issues we serve them on and how we build a trust-based counseling relationship?
- D. Which of the questions are most important for you to focus on to strengthen your relationship with clients?

Self-observation exercise:

Asserting yourself in senior management meetings

Objective

To become more aware of how you assert or don't assert yourself in senior management meeting.

Instructions

Think of yourself as two persons, one who act/reacts and the other who observes and is passive.

In each senior management meeting, use the following questions to observe yourself passively. Observe your internal states (i.e., thoughts, feelings) as well as what you show the world.

At the end of each observation period, scan through the interaction and note what happened and how you reacted. Write a few notes so you can begin to notice patterns.

1. What points of view, comments, and/or recommendations did you put forward in the conversation? What questions did you ask? What risks did you take?
2. How did they influence the flow of the conversation? Did they achieve what you had intended? If they weren't effective, how could you have changed them so they would be?
3. What other points of view, comments, recommendations, or questions didn't you raise? Why not? How would they have influenced the flow of the conversation, in terms of content and relationship?
4. Think back to major shifts in the conversation. What precipitated the shifts? What were you thinking at that time? How did you respond? In what ways would you have liked to respond and didn't?
5. Overall, how would you categorize your responses and contributions to the conversation (e.g., putting forward a point of view, building upon another's ideas, probing for clarification or detail, rebutting a point)?
6. How did you feel about your performance in this meeting? What were the highlights? What would you like to have done differently?

Self-observation exercise:

Presenting findings using a top-down approach

Objective

To develop a fact base regarding how well you present a buttoned-down answer using a spontaneous top-down approach. To become more aware of how you feel as you present a top-down approach and provide backup only as necessary.

Instructions

Think of yourself as two persons, one who act/reacts and the other who observes and is passive.

When you are asked to present an opinion, stop for a moment and force yourself to use a top-down approach. Focus on giving the answer as briefly as possible and providing supporting detail as requested.

While you are participating in the meeting or conversation, observe yourself passively. Observe your internal states (i.e., thoughts, feelings) as well as what you show the world.

At the end of each observation period, scan through the interaction and write a few notes so you can begin to notice patterns.

1. At what points did you deliver a top-down message?
2. How did others respond? How did you know if they accepted your response? Did they move on to another point in the conversation? Did they ask for backup?
3. Did you feel that they understood your point of view? Did they have the level of detail you think they need?
4. How did people indicate that they wanted more information? How would you characterize requests for more information – exploring information in depth? checking accuracy? testing the strength of your case? understanding implications?
5. How correct did you feel your spontaneous answer was? How did you modify your quick answer through the conversation?

Self-observation exercise: Becoming a better listener

Objective

To become more aware of your listening habits.

Instructions

Think of yourself as two people, one who act/reacts and the other who observes and is passive.

Each day, select three or four interactions to observe yourself in. These should be a combination of formal meetings (internal and external), casual internal meetings, and casual conversations.

Using the following questions, begin to observe yourself passively. Observe your unspoken thoughts and feelings as well as what you show the world.

At the end of each observation period, scan through the interaction and note what happened and how you reacted. Write a few notes so you can begin to notice patterns.

1. What did you learn from the person? What was different than what you expected? What parts of the conversation do you remember most clearly? What parts of the conversation do you think the other person remembers most clearly?
2. What was the person saying nonverbally? Was there congruence between what the person said and his/her gestures and body language?

3. How did this interaction impact the relationship, your understanding, or their action?
4. When did you enter the conversation (i.e., start talking)? At what points did you interrupt and respond too quickly? For example, what type of statement was the person making, and how long had the person been talking? Why did you jump in? Were you impatient, thought you knew what they were going to say, disagreed with a point, wanted to share an example, or had a solution to the issue?
5. How would you categorize your responses and contributions to the conversation? Examples include putting forward a point of view, building upon another's ideas, probing for clarification or detail, or rebutting a point.