



Coaching to Effect Change and Develop Talent



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Over the years I have been asked many questions about how to coach and develop talent within the firm. Below, I took a Q&A approach to share advice on what it takes to become a better coach and improve talent development within your firm.

The old adage goes something like, “Great coaches aren’t made, they’re born.” Do you agree with that?

I don’t believe anything could be further from the truth. When I look at great coaches and leaders in our profession, virtually all of them had little training and developed through the “school of hard knocks.” I’m a big believer that great coaches can be made, but clearly there are some prerequisite skills that one needs to have or develop to excel.

What might some of those skills be?

I believe that great coaches need to be viewed as trustworthy more than anything else. I also believe that great coaches need to be great listeners and communicators. Often, people understand the goal. They simply don’t know the specific action steps required to get there or how to overcome certain obstacles along the way. The coach who asks great questions and also listens can help remove some of the clutter and ambiguity that can stop individuals from reaching their full potential.

Is there a certain communication style that a great coach should have?

Yes and no. I think that one’s communication style is simply a function of the individual one is attempting to coach. Some individuals, such as superstar performers, can often be coached by “being

left alone” and not having the coach in their face all the time. It sends a statement that the coach trusts you and knows you have a track record of always overachieving. One also needs to send a message, however, that the coach is there as a resource if needed. At the other end of the spectrum are individuals who need a lot of coaching (or a lot of “loving” as I call it). With these individuals, coaches need to be extremely careful to ensure there is a cost benefit to the coaching relationship. Certain individuals are high maintenance and continuously come to meetings not having achieved the things they committed to in the prior meeting. At some point, they need to be called on it. The best strategy I know is one that I refer to as “constructive confrontation.” This is a respectful way of talking to someone adult-to-adult, but clearly addressing the issues directly with them (e.g., “You said you would do these things at our last meeting and have chosen not to do any of them. Why has that happened?”)

You also talked about the sincerity of coaches and how they should not just coach or mentor because someone was assigned to them, but instead truly take an interest in the individual. What is an example or two of how one can be more sincere in the approach to coaching someone?

I find it interesting when I hear coaches tell me they have quarterly meetings with their people (also known as “mentees”) and they seem to think this is an effective way to hold people accountable. Although I commend people on meeting quarterly, I would suggest if that is all they are doing it is a flawed approach. A great coach checks in every couple of days and, for sure, no less than each week to make sure that the smaller action steps and goals that the individual committed to at the prior meeting are, in fact, being performed. Additionally, if they are not being performed or the individual has hit some wall, this is a great way to intercept the obstacle rather than potentially waiting 90 days to talk about it. I think great coaches are also great cheerleaders and the individuals being coached know that they have someone in their corner pulling for them to achieve these goals. I know from first-hand experience throughout my life, my mom has always echoed those nine magical words, “You can do it Allan, I know you can.” To me, just knowing there is someone who believes in you probably helps you achieve more of your goals because your confidence level is high and you can’t help but believe in yourself as you approach each new task, goal, or opportunity.

As a coach, how do you push people beyond their comfort level?

That’s an easy one. Let me say it this way—if you’re not pushing one’s comfort level, you’re not coaching! I like to focus people on three components of change. I tell people that they’re either performing high level surgery (performing at your standard billing rate), performing in what I refer to as a grey area (if you’re a partner this is something that a manager should be doing) or, lastly, what I refer to as “robbing from the cradle” (as a partner, this is when you are not only doing something that a manager should be doing, you have actually dipped down another level to that of a senior supervisor and are performing that work, as well).

I like to start coaching sessions by telling people that for all of us, 50 percent of what we do, day in and day out, could be done by a more junior person. I am not saying that is an absolute test, but I think it begins the breakthrough process of getting people to realize if they were gone from the firm tomorrow that, in fact, a lot of what they do could be transferred to someone else and, more interestingly, probably to someone at a more junior level. Reflecting on what we do daily, monthly, and annually is an important exercise to go through because if we are going to take on more goals, by definition it implies that something needs to come off the list.

You talked about goal setting and suggested that if one doesn't embrace goal setting that it renders coaching somewhat ineffective. Could you elaborate on this?

Yes. In my study of goal setting and high performing partners, I have come to realize that those that continuously excel follow GAAP—goals, action plans, accountability, passion. More specifically, they commit goals to writing, have very detailed action plans of how they are going to achieve those goals, build in a level of accountability (e.g., a coach) so that someone is holding them accountable for the results and, finally, perform with an outrageous amount of passion (almost to suggest that their paycheck is riding on the line of whether or not they achieve the goals). On the positive side, I have found that goal setting and the process of breaking big goals down to smaller goals can actually reduce one's stress, save time, improve decision making, and also, I believe, build confidence because the individual feels the success of achieving smaller milestones building up to the larger goal.

If it is so obvious, why do you think that most partners in CPA firms choose not to commit to written goals?

I've asked this question of many partners and typically I'll get responses, such as they had conflicting demands, didn't have available time, or it simply wasn't a priority. Some will even suggest they didn't have the proper resources or just lacked focus. While I think these reasons are all valid, I believe without a doubt that the #1 reason we don't achieve our goals or commit to written goal setting (with accountability and coaching) is our basic "fear of failure." I remember watching a talk show where they interviewed Lou Brock, who at the time had the record for most stolen bases in the history of major league baseball. When the talk show host asked him what his biggest disappointment in major league baseball was, we all thought he would say it was holding the record for most times being thrown out trying to steal a base. In fact, he surprised all of us by saying that his biggest disappointment in baseball was the number of times he was on first base and the third base coach had the steal sign on, but he didn't go! I believe there are a lot of us on first base, seeing the steal sign from the third base coach, but coming up with our own self-imposed obstacles or restrictions of what we can or can't do. Fear of failure is a killer and great coaches know how to flush this fear out and put this "moose on the table" to get people to openly talk about it.

Any other advice for potential coaches in terms of improving their performance?

I will tell coaches to be truly vested in the people they are coaching to the point where it is okay to share in their victories and successes. I do find, however, that as a coach it is not so much how you celebrate the highs, but it is more about how you get your people to bounce back from the lows. For me, the greatest testament of a coach is the individual's ability to get someone to a performance level that the person could not have reached on his or her own. I also believe that striving for high performance by definition means that you are going to have failures and continuing obstacles along the way. Great coaches know how to pull their people out of these ruts and keep them focused on continuing to achieve. No one has ever achieved a meaningful goal without getting knocked down frequently along the way.

What was your biggest deficiency that you had to overcome in terms of becoming an effective coach?

I'm embarrassed to tell you that I was a lousy listener. Early on in my coaching career, I must have felt that I was psychic or something and I could read people's minds so that I didn't need to listen to what they had to say. It was not until an upward evaluation was done on me that it became quite apparent that I had to improve my listening skills. The first thing I created was a mantra that I could rally behind, which was "learn to listen so you can listen to learn." I then developed action steps, such as looking people in the eyes and learning how to read their body language (if you're not sure if this matters, think about what you hear on a phone conversation vs. sitting down face-to-face with a person). I also began taking notes and asking a lot of questions. I ultimately found that when I read my notes back to the person I was coaching, sometimes, in fact, I had not truly heard the right message. I found out that listening is not something you can multitask through. You are either there and present or you are not. You can't be sitting in a coaching session, thinking about other things, and only allocating 25 or 50 percent of your brainwaves to that person. If you are willing to do many of the things I've talked about, I believe you can become a great coach and an invaluable asset to your firm.

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