

# Executive Guide to In-The-Moment Coaching



Learn how to utilize In-The-Moment (ITM) Coaching to establish a culture of high performance and constant learning on your team. No time to coach? No worries! These conversations can happen in 4 or 40 minutes - it's all in the approach. This action-oriented guide will get you started, now.

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*“Coaching goes with the grain,  
rather than against it!”*



Given the fast-paced, demanding business environment today, it's no surprise many executives end up adopting a hard-driving, critical leadership style which manages to take a toll on self and others. Some end up on the brink of burn-out due to stress; others have hoped for exceptional results from themselves and their team, but have come up short.

Constant market shifts require deft problem solving, new thinking, and novel applications. Good coaching skills can be critical for you in solving the day-to-day situations that come up, and to enable your team's performance and their ability to learn. Your job as a leader is to establish a culture of high performance and constant learning, and the best tool we have found for executives to do that is coaching!

Coaching your team establishes a culture of learning and constant feedback, leading to increased employee engagement and productivity. It is your best talent development tool. You can use it to reinforce positive observed leadership traits or you can course-correct quickly and smoothly. “Teaching others to fish” gives your team more empowerment and boosts accountability. Further, coaching to your vision sustains change. Results stick.

However, if you are like many of the executives with whom we work, you might feel resistant about coaching your team because you believe it requires time – extra time and bandwidth you simply don't have. The solution for that challenge is In-the-Moment (ITM) Coaching.

You see, coaching is not about having enough time; it's all about your mindset and skill. Getting insight and committed action from another person requires him/her to think things through versus being given advice or being told what to do. Coaching opens the door to these new perspectives and new actions. ITM Coaching, in particular, is a simple, powerful problem-solving tool which allows you to have coaching conversations “anytime, anywhere.” Highly practical, this coaching approach leverages learning opportunities present in typical day-to-day interactions, including those that occur in the hallways between meetings. For that reason, ITM Coaching is the ultimate problem-solving tool to get at difficult issues quickly, help others get “unstuck,” make decisions, and drive results. ITM Coaching works well because it is consistent with the way work gets done and information flows in an organization. It goes with the grain, rather than against it!

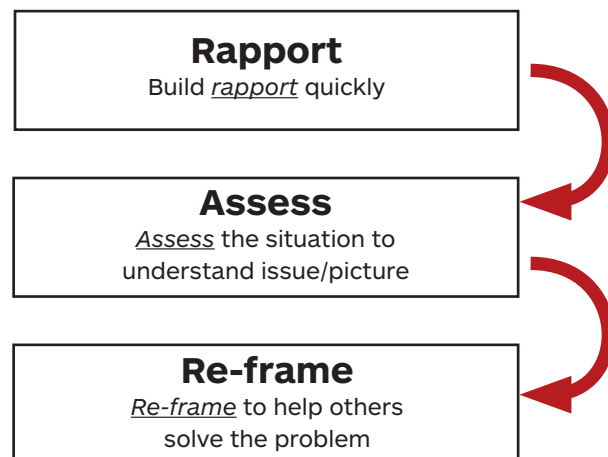
The typical application of ITM Coaching is during weekly or bi-weekly 1:1s, on your way to your next meeting, or a quick catch-up with someone. Whether you're having a 40 minute conversation or a 4 minute one, you can put the ITM Coaching Model™ into use.

## ITM Coaching Overview

The ITM Coaching Model™ is comprised of three sequential steps: **Rapport, Assess, Re-frame (RAR)**.

- Establish rapport with the other person
- Assess the situation to understand the problem
- Help the other person re-frame the situation with a new idea or action

Each step builds on the other and requires a specific mindset, particular skills and a dose of self-awareness. But once applied consistently, your leadership effectiveness and your team's performance will increase exponentially.



## Rapport

As you begin a coaching conversation (any conversation, really), it's important to establish a connection with the other person. Rapport means being in tune with another person, physically and mentally, and it is an essential leadership skill. Rapport is established behaviorally. The idea is to move towards "sameness." This means you will match your body language, voice quality, words and sense of urgency with that of the other person. For example, if the other person is sitting down, best if you do too. If he/she speaks fast, you speed up to speak at his/her pace. Also, try to use some of the same words as the other person (this is usually called active listening) so the other person perceives that you are listening and are "with him/her" in the conversation. Sameness calms the brain and allows it to function more optimally than when under stress.

A critical part of establishing rapport is to shift your behavior/actions to meet the other person's sense of urgency. In a coaching conversation, it is imperative that the other person feels like you "get him/her," and the best way to be with the person is to match his/her sense of urgency and then offer to help. To a clearly agitated person who is speaking with a lot of intensity, you could kick up your voice and physical intensity a bit and say, "Wow, that sounds really upsetting/irritating/ aggravating" followed with an offer to help, "I'm happy to help you think this through."

To a clearly deflated person with low energy, you could slow down and quiet your voice and say, "Whoa, this sounds to be very troublesome/worrisome/deflating" followed with, "and I'm happy to help figure something out, or help make this better." This matching will ease the other person's anxiety and at the same time, establish that you care, you're with him/her and that you can truly help him/her figure out the situation.

In your role as coach, your job is to create safety; establishing rapport or "sameness" creates this safety. If you "mismatch" behavior instead of "match" it, you run the risk of creating difference instead of sameness; you may be perceived as threatening instead of safe. And this could very well derail the coaching conversation by triggering a fight, flee or freeze response.

*"Rapport means being in tune with another person, physically and mentally, and it is an essential leadership skill."*

Rapport should be maintained throughout the conversation. The most common way to break rapport is through distractions or multi-tasking. Distractions send a signal to the other person that you aren't listening, can create anger or frustration in the other person, and disrupt creative thinking. Clear distractions by turning off your phone or other devices or moving to a non-distracting location, for example, to help you become more present with someone. Remember, in a coaching conversation, presence is 90% of the job!

## TRY THIS

Pick three sequential days during which you can focus on the skill of *Rapport* and make a concerted effort to **MATCH** and **CLEAR DISTRACTIONS** in any 1-1 conversation.

At the end of the day reflect on how you did, the impact, and if/what you want to try differently.

We suspect the impact will inspire you to keep doing it!

## Assess

Now that rapport has been established – in a 4 minute or 40 minute conversation – it's time to “set the problem.” Assess is purely about discovery: asking questions, staying curious and noticing while you seek to understand. Inquiry will be your primary tool. You will need to let go of any need you might have to solve the problem. In this step, you explore how the other person is viewing a problem, relationship, or situation so that you can understand the current frame and uncover the most important problem that needs solving right now. Remember, you are driving towards helping the other person arrive at his/her own fresh perspective, idea or plan.

The key to success in this step is asking powerful, open-ended questions. You will use open-ended questions because of their effectiveness at uncovering another's perspective. They also open up new ideas and thinking. This is exactly what you want in discovery mode! Closed-ended questions will yield yes/no responses and are not appropriate to use at this step.

To get you started, here are specific questions you can use to assess the situation. Notice they are open-ended and will solicit additional information.

- “Tell me more...”
- “What do you mean by...?”
- “What are some examples?”
- “What's behind your thinking?”
- “What are some of your assumptions?”
- “What have you tried so far?”
- “Have you encountered this before? What did you do?”
- “What's your primary concern?”
- “What do you want to achieve here?”
- “What would be most helpful to focus your attention on now?”
- “Of all the topics you've brought up, which one do you want to solve for now?”

*“The key to success in Assess is asking powerful, open-ended questions.”*

Remember, the intent is to be curious and to understand the person and his/her perspective in addition to the situation. We often focus way too much on the situation. Just being curious and seeking to understand is more important than having the perfect question. Also, try to remain present in the conversation and continue to listen to the other person. Don't stop because you're trying to think of the perfect next question!



Assess is not just about strategic questioning. You want to notice how the situation is being described as well as the other person's reaction to it, and motivations. Listen for specific words being used, any constraints on thinking and his/her view on others. Self-limits such as universals, generalizations, or "us vs. them" provide openings for you to ask new, open-ended questions.

#### Summary of self-limits you might notice:

- Universals – all, never, every, too much/many
- Generalizations
- Hierarchical/status
- Us/them
- Either/or
- Blame

To illustrate, let's look at the statement "I'm frustrated because no one ever listens to my ideas." Here are some potential questions you can ask as a coach:

- "No one listens to you?"
  - (Looking for clarity in the universal of "no one.")
- "What makes you think people aren't listening?"
  - (Getting clarity in order to solve the right issue; as in the other person doesn't literally hear out the ideas or he/she doesn't do anything about the idea.)
- "What frustrates you about it?"
  - (Teasing out more detail about exact cause of frustration.)
- "What are your beliefs about the other's intent?"
  - (Opening up a new opportunity to explore and shift perspective.)

Before moving on to the next step you should feel like you have a good grasp of the situation, the person's perspective, and the specific problem to solve/discuss further. The other person's brain should be firing away yet focused as you've created a safe and autonomous way for the person to explore his/her thinking. (Sometimes the conversation ends here because through your assessment questions the person has already sorted out his/her problem!)

### TRY THIS

Pick five or more sequential days during which you can practice the skill of Assess in appropriate 1-1 conversations. Make a concerted effort to **LET GO OF THE NEED TO SOLVE/ADVISE**. Instead, stay **CURIOUS, ASK, LISTEN**, and **SET THE PROBLEM** (i.e. establish what problem to solve).

At the end of the day reflect on how you did, the impact, and if/what you want to try differently.

This step is usually the hardest for busy, smart, problem-solving leaders. But the more you try to stay in Assess, we are sure the results will inspire you to keep doing it!



## Re-frame







Once you have an understanding of the current frame and most important problem that needs solving, it's time to re-frame the situation or problem. Re-frame isn't about telling the other person what to do or what you think. Here, you are helping the other person move him/herself towards a solution.

Questions will still be used to elicit new thinking, but you might also make suggestions about possible new approaches. Suggestions are typically helpful in the form of brainstorming, so you are contributing ideas together. Here are some sample questions:

- "What other perspectives would help you in this case?"
- "What other ways can you look at the situation?"
- "How can you shift your feelings?"
- "Let's throw out some ideas together, ok? How about \_\_\_\_\_?"
- "Here's a thought \_\_\_\_\_. How does that work for you?"
- "When you are in this situation again, what do you want to try?"
- "What request do you need to make/feedback to give?"
- "How about trying \_\_\_\_\_?"
- "How will you remind yourself to do \_\_\_\_\_?"

If you noticed language or potential self-limits, this is the time to share those observations and re-frame them. For example, if you heard a generalization, "I shouldn't..." you might ask, "What if you did?"

Here is a summary of Re-framing Limits:

Limit		Re-frame
Universals		All, Every, Never? Who Exactly?
Generalizations (Should/Shouldn't)		What would happen if you did...? What causes/prevents you?
Hierarchical, Status		What would you say if there were no levels?
Us/Them, Self/Group		What shared goals do you have?
Either/Or		Where is the AND?
Blame/Venting		How do you go from blame/victim to action?

It is also important and apropos near the end of a coaching conversation to get specific about commitments for any new action and follow up. The brain is still fired up, motivation is high, and the future thinking/planning part of the brain is alert – so lock in the action plan! The likelihood for follow-through will be very high!

In the Re-frame step, it is important to be aware of your own need to push the conversation forward to a re-frame without a clear understanding of the problem, or if you hesitate to move to re-framing at all. The key take-away is that it is normal and OK to move back and forth between the two steps of Assess and Re-frame.

Finally, if Re-frame doesn't move the other person towards a natural solution, leave him/her with a good question to think about and reconvene at a later date. He/she may just need more time to think. This is how great leaders add value in those moments.

*“In Re-frame, it is important to be aware of your own need to push the conversation forward to a re-frame. Do you have a clear understanding of the problem?”*

## TRY THIS

If you have practiced *Rapport* and *Assess* (and we mean **REALLY** practiced *Assess*) you are ready to try new *Re-framing* skills and to put the whole model together.

Pick three upcoming conversations in which you can focus on using the ITM approach. Reflect and prepare:

- How will I get into *Rapport*? What might get in my way? (Distractions, etc.)
- How will I stay in *Assess*? What are a few go-to questions I might use? How will I prevent myself from jumping to solutions too quickly? How will I know when I've “set” the problem?
- How will I *Re-frame* deftly to not just drive to MY answers or solutions? How will I determine any next steps or agreements?

At the end of each conversation, reflect on how you did, the impact, and if/what you want to try differently.

Getting good at coaching takes practice. Over time it will become easy to shift your mindset into “coach mode” and to use the three steps, even in a brief conversation.

## A Scenario

Here is a situation that we have heard many times over the past 18 years coaching executives:

A technology VP has a high performing team made up of mostly A or B+ players. He/she will have inherited or hired a C+/B player whose team's performance has become a source of frustration. This type of direct report's expertise is highly valued and needed on the team and he/she is a good teammate, but his/her team doesn't get things done as fast or with as much high quality as other teams. Most executives have one or two people who fall into this category and the frustration stems mostly from the VP having to "manage" the direct report's team's performance, check in on the C+/B direct report too much. This causes the VP to get annoyed and exasperated. And as you might suspect, the direct report is also frustrated because he/she feels "micromanaged." Or, in a similar vein, the direct report gets frustrated because the boss just says, "handle this" without solutions.

### How does the VP shift to "coaching" this direct report instead of "micromanaging" or ignoring him/her?

There are primarily two aspects that an executive would address in his/her role as a coach: motivation/perspective and behavior. In this situation below, the VP needs to address both: motivation and interest, not just behavior. Often in these situations, the VP is perceived as "micromanaging" because the direct report feels like he is receiving negative feedback on performance. ITM Coaching can help balance the need for accountability and the need for long term development.

VP:	Hey Bob, how are you doing today?
Bob:	Pretty good, except for a couple of typical challenges. You?
VP:	I'm good. Let's see if we can tackle those challenges. What's on your list of agenda topics for today?
Bob:	Lots, there are several big updates/issues on the Road Map, your input on the MLI proposal, my recommendations for promos in this next cycle, and quick alignment about the QBR content.
VP:	Sounds like lots going on. What's the most pressing for you right now?
Bob:	On the Road Map, the Genesis project is losing traction. We are going to slip the deadline again.
VP:	We can't slip the deadline again, Bob. Our (internal) customer is going to be pissed.
Bob:	I know, I know – thus my challenge and frustration
VP:	I bet it's frustrating! Ok, so let's step back and look at this together? Tell me more about the folks on your team.
Bob:	Most everyone is doing great, but I am ready to throw my hands up regarding Ned. We need his expertise, very few are like him. But I just don't get him. He says he's going to do stuff and eventually gets it done, but at the very last minute or often past the deadline.
VP:	Tough one, and not uncommon. When we talked last time, we talked in generalities, and I think I may have told you to just "go fix this." What did you try? What happened?
Bob:	I tried being more specific and direct about requirements and dates, but it's weird, it looks like he hears me and agrees with what I tell him, but he is just not on it like I want him to be.
VP:	You say he's not "on it." What is he not doing?
Bob:	You mean besides just not delivering the project on time?
VP:	Yeah.



Bob:	Well, I have asked him to provide milestones, to give me a heads-up if he runs into brick walls, etc. He doesn't do any of that either.
VP:	Sounds like you've tried hard to manage his behavior. Frustrating to not have it working! You think he's capable of the work?
Bob:	Oh yeah, for sure—that is what is driving me nuts!
VP:	Hmmm, what do you think might work besides getting on him so closely?
Bob:	I don't know. There is some sort of motivational thing on this one project because he does get other things done on time, and with the creativity we need.
VP:	Well that's a big insight! So how can you get at some of this motivational stuff?
Bob:	It's possible that he just isn't that interested in this particular project. But we are just too small of an organization to merely let everyone do only what they want to do.
VP:	Yep...
Bob:	I am just going to tell him he has to do it, get it done, give me the milestones and that's that. If he doesn't, I will demote him.
VP:	Wait a second, I thought you just said you need this guy and he performs well on other projects?
Bob:	I do, but I am kind of fed up with him.
VP:	Don't assume that you can't lead through this motivational issue. You're creative and this guy is valuable. Let's look at some options.
Bob:	Ok.
VP:	I am wondering if you can utilize different people's strengths. What are Ned's strengths in the situation? And who can you or he leverage to do the things that Ned's not great at?
Bob:	He's the visionary, the technical expert. But he is also the manager of that team and he has to be able to get on people. I think on this particular project, the team he assembled is just letting him down.
VP:	So getting on people is not his strength, not his personality. Really not yours either.
Bob:	Ok, I get it. He doesn't want to make waves, he's more of the visionary guy, and his motivation is low to fix this team.
VP:	Who is the diamond in the rough? Who on that team can drive it home?
Bob:	There's a guy, Tim, who might be a good one for this. I will talk with Ned about it.
VP:	Ok, what questions are you going to ask?
Bob:	Well, I need to understand more about his team, their strengths and see if I can help him find a better way to organize them. And I also want to ask Ned about his interest level in this project and see if I can get him fired up about it versus hounding him.
VP:	Great. When can you let me know how the conversation went?
Bob:	I won't wait for our next scheduled 1:1. I'll drop by your office by next Monday, ok?
VP:	Ok! Next topic...

This dialogue is meant to demonstrate how effective and quick a coaching approach can be. Instead of feeling frustrated and at a loss for how to solve a problem, Bob is generating his own next-steps and approaching the problem with a new, more productive, perspective. Good thing for both Bob and Ned!

## Conclusion

ITM Coaching leverages the conversations that are already in place and occurring daily with your team. It demystifies the coaching process and breaks it down to 3-steps you can remember as you move through your day. The next time you are in a conversation, notice if learning opportunities are present. How will you turn these opportunities into coaching moments? By using *Rapport*, *Assess*, *Re-frame*, naturally!

## ITM Coaching Key Takeaways

### ITM Coaching Tips

#### **Rapport:**

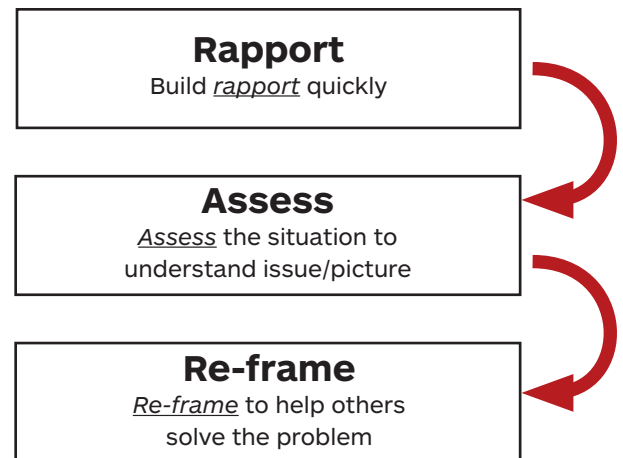
- Match body language, pace, words, urgency
- Clear distractions

#### **Assess:**

- Use open-ended questions
- Notice the current frame and any self-limits
- Uncover the most important problem

#### **Re-frame:**

- Offer observations
- Move toward new solutions/ideas with questions that shift thinking
- Get specific with any commitments



**Hint: RAR**

## Resources

### WORKSHOPS

- Mariposa Leadership: *Leading Through ITM (In-The-Moment) Coaching*. Deepen your ability to practice ITM Coaching with your internal team or at our public workshops with other technology executives!  
To learn more: <https://mariposaleadership.com/executive-coaching/leadership-coaching-for-groups/offsites-strategy-meetings/>
- New Ventures West: *Professional Coaching Program*  
To learn more: <http://newventureswest.com/>

### BOOKS & ARTICLES

#### On Coaching:

- *Leadership Chronicles of a Corporate Sage* by Susan J. Bethanis, Ed.D.  
To learn more: <https://mariposaleadership.com/for-clients/>
- *Coaching: Evoking Excellence in Others* by James Flaherty
- *Becoming an Exceptional Executive Coach* by Michael Frisch, Robert Lee, Karen Metzger, Judy Rosemarin, and Jeremy Robinson

#### On Rapport:

- *To Sell is Human: The Surprising Truth About Moving Others* by Daniel H. Pink
- *Smart Work: The Syntax Guide to Influence* by Lisa J. Marshall and Lucy D. Freedman

#### On Brain Science:

- “The Brain Friendly Organization: What Leadership Needs to Know for Intelligence to Flourish,” by Janet L. Crawford  
To learn more: <http://www.cascadance.com/resources/>
- *Mindsight: The New Science of Personal Transformation* by Daniel J. Siegel

### BLOG POSTS & BLOGGERS

- Mariposa Leadership blog | <http://mariposaleadership.com/blog/>  
Read: [Ask Mariposa: 6 Keys to Effective Delegation](#) by Barbara Bail
- The Energy Project blog | <http://theenergyproject.com/blog>  
Read: [What it Takes to Fully Engage Your Employees](#) by Tony Schwartz
- Harvard Business Review blog | <http://hbr.org>  
Read: [For Real Influence, Listen Past Your Blind Spots](#) by Mark Goulston and John Ullmen
- Inc. Magazine: Lead | <http://www.inc.com/lead>  
Read: [10 Traits of Great Leaders \(and Their Followers\)](#) by Kevin Daum

