



THE ALIGNMENT MEETING: A GUIDE FOR COACHES

A free resource provided in addition to the book, *Building the Core Competencies of Change: A Guide to Coaching in Organizations*. To purchase the book go to: <https://www.amazon.com/gp/product/1642252530>
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In coaching engagements with an individual, a key to ensure a strategic use of coaching is to create alignment with organizational goals through the alignment session.

The alignment session is a coach-facilitated conversation with the client and their sponsor. The sponsor is either the client's supervisor or another professional who oversees the client's growth and development or organizational outcomes.

Alignment meetings most often occur at the beginning of the coaching sessions. They may also occur at a midpoint and at the end of the coaching engagement. The purpose of an alignment session is often stated as an opportunity to incorporate the supervisor's input to the client coaching goals and to have the client share their goals and progress with the supervisor. However, an alignment session has far more benefits that enhance both the sponsor leadership and the client coaching goals. These benefits include:

Coaching goals alignment and feedback

Enhancing the role of the supervisor as development advocate

Increased client self-advocacy

Coaching Goals Alignment and Feedback

Alignment between the client, sponsor, and coach on what will be tackled by the client in the sessions is beneficial to the success of the coaching. Since coaching is confidential, engaging the supervisor in reviewing the client's goals allows the supervisor to add to or revise the goals. This may reveal unstated agendas by the supervisor. For example, the supervisor may find delivering critical feedback difficult. By engaging in a positive conversation positioned as how to "enhance the client's learning for continued growth," the supervisor may be able to express what they hesitated to express before.

The clearer the supervisor's expectations are of the client, the more likely the client will be successful in fulfilling them. If the supervisor is deploying organization resources to the client's development and growth with coaching, this helps the supervisor feel that the investment is achieving their leadership objectives as well. The coach can pose the question, "What would be success in your (the supervisor's) eyes for the client at the end of this coaching assignment?" This question can unearth any unspoken agendas or expectations that the supervisor may have for the client. It can expose any unrealistic expectations the supervisor may have for the coaching.



For example, the supervisor may say they want the coach and client to work on a strategy document deliverable. This allows the coach to explain to the supervisor the definition of coaching as assisting the client in the ability to execute on that; however, the coaching doesn't involve consulting the client on that matter.

In the coaching program models of Audience-Target Outcomes and Organizational-Target Outcomes¹ Coaching, there are organizational goals for the coaching that are communicated in the alignment meeting. These may be to instill certain leadership competencies or to integrate new learnings or other various outcomes desired by the organization. In this case, the alignment meeting ensures that the coach and client have connected the client goals to the organizational expectations. The meeting with the sponsor or supervisor will be for the client to express their unique goals for the coaching as translated into what barriers or challenges they face in adopting the changes required by the organization strategy. For example, if the organization has asked decision-making to be delegated down to the next level of management, that will be the umbrella goal stated by the client and coach. However, under that umbrella, there will be goals the client feels they need to achieve to accomplish the umbrella goal. The client may say they will need to work on communication skills specific to delegation. They might also say they will need to enhance their strategic visioning and communication to better articulate outcomes and delegate.

Often, clients perceive that the supervisor defines their success as financial goals alone. That said, employees who achieve financial goals may fail to gain promotions because the manager has never effectively shared other deliverables they want from the employee. Thus, the alignment meeting is a process of searching for the unspoken metrics for success, so the client is not blindsided. For example, the supervisor may say they would like the manager to work on their delegation skills. The reason they give may be so that the manager can increase the team output and step up to more leadership skills, such as defining and driving strategy. It may come as a surprise to the employee that defining strategy was an expectation of the supervisor. Even the supervisor may not have thought to articulate this expectation to the client before.

Additionally, the client may ask the coach to pose a question to the supervisor. The coach might inquire, "What are the priority deliverables that you expect from your client over the next six months?" While that should have been a conversation that was held between the supervisor and client before, it may give the supervisor a new perspective on their response as they describe it to a third party.

1. The Audience-Target: With this model, there are specific strategic organizational outcomes for targeted groups of individuals within a company. The organization creates a strategic goal for a select group of leaders, managers, or employees. For example, audience targets can include seniority levels in the company related to leadership development competency development, or it could include audiences facing specific issues that would benefit from coaching. This might be high stress caused by a specific organizational change. It could also involve transition audiences, such as new hires or promotion and succession candidates. This model has a broader impact on multiple individuals and/or teams and accomplishes set strategic objectives.

The Organization-Target: This kind of model is used to carry out overarching, strategic, desired organizational outcomes. Coaching becomes the catalyst to organizational change that helps break down barriers to change and support the complex thinking and learning loop required. Within the model, there may be multiple target populations of individuals and teams that will be involved in creating the desired organizational outcomes. Given this larger view and scope, top leadership is more involved with the coaching program. A CPS or executive who has experience with building a coaching strategy is usually deployed to oversee the model.



I often find that the supervisor doesn't know how to provide feedback on soft skills such as emotional intelligence or communication in a way that feels comfortable. In the alignment meeting, the coach can model how to tease out the vocabulary used in framing improvements in an effective way. For example, the supervisor may say the employee needs to have better "optics" with top leadership. This is an unclear objective: it is ambiguous what the issue is behind that comment and what behaviors the leader would want to see.

Does the leader think the employee doesn't express themselves clearly? Is it that they don't speak enough in meetings? Do they fail to tout their successes adequately? The coach asks questions to help clarify what the leader means. The coach might inquire the following:

"What behaviors would you see if the employee were to ensure better optics with leadership?"

"When you say 'leadership,' who do you mean?"

"What benefits would it bring to you and the employee by having better optics?"

As the supervisor answers these questions, the client is able to better understand what the expectations are. They can then work with the coach to begin the improvement process.

Enhancing the Role of the Supervisor as Development Advocate

The alignment meeting provides an opportunity for a supervisor to shift away from transactional communication of the day-to-day needs of the operation to a focus on developing the client. These client- development-focused conversations often are not planned, and when there is not a precedent for them, leaders often don't know how to jump-start them. The alignment meeting can set a precedent for continuing feedback to the client based on their professional development. Through the alignment meeting, the supervisor is learning how to articulate professional development objectives and build out behaviors attributed to those objectives. The coach may hear the supervisor use work goals as coaching goals such as, "I expect him to merge the two teams by Q3." The coach may ask, "What strengths and challenges do you think the client will bring to doing this?" The question frames the work objective on the professional development opportunities.

For supervisors who are well versed in professional development work, the challenge of providing regular feedback to their people is that they don't assign the time to do it. The alignment sessions are an opportunity for the supervisor or client to recognize that feedback is indeed important, and that a meeting about it can be positive and productive. The coach can ensure that the supervisor and client have a next step in place to make these types of meetings regular events. This is often done through questions. The coach might ask, "How will you make this type of conversation a regular part of the work over the next year?"

If a final alignment session is conducted at the end of the coaching assignment, the coach can pose the question of how the client can receive professional development support going forward. This question evokes thinking in the supervisor about what their role might be going forward. The client and supervisor can be encouraged to articulate their next steps after the coaching terminates.



Increased Client Self-Advocacy

The alignment meeting can enhance the client's ability to self-advocate. Often, an employee is hesitant to ask their supervisor for support. They may have secret ambitions to move up through the organization but not share these with their supervisor. They may struggle with developing certain skills and competencies and not think to ask for assistance. In my coaching, I hear reasoning such as "My leader is so busy; I don't want to burden them," or "I don't want to appear unskilled in front of my boss." In each alignment meeting, I ask my clients what support they would like to receive from their supervisor. The approach seems to give the client a feeling of safety in asking for support from the leader. Once they see a positive reaction on the part of the leader, they find they can continue to advocate for themselves in the future. Additionally, this method helps the client shift away from driving through their day without picking up their head to thinking about other questions they might ask for themselves.

For the Coach: How to Conduct Alignment Meetings

Alignment meetings are held by the coach and client and include the supervisor or sponsor. The coach's role is to prepare the client, facilitate the meeting, and ensure meeting synthesis. It is important that the client is the one to discuss their goals during the meeting so that they are perceived as the owner of the goals and so that the coach isn't speaking for the client.

The alignment sessions are not the first meeting between the coach and client. The client and coach must first develop a rapport and understand how they will work together. First meetings between coach and client are the verbal "contracting" phase where the client can understand how coaching works, who the coach is, and what tools and methods they use. Trust is essential in a coaching relationship and the development of trust between coach and client starts in the first meeting.

The coach will want to assist the client in articulating their personal goals for the coaching. Often coaching consists of goals outside of organizational goals because these other goals will most likely impact the organizational goals. For example, a client may say they have a goal of life balance and stress reduction. The ability to meet any organizational goal will be impacted by the energy the client can bring to work every day. While this goal may not be literally shared with the sponsor, it is an important goal for the coaching engagement.

Preparation

In an alignment meeting preparatory coaching session, the coach assists the client in articulating their goals for their coaching. A leadership development plan that lists the goals and defines what success might look like once the goals are achieved can be created. This ensures that the client is thinking about what they want to achieve from the coaching to either support or enhance organizational goals. The coach advises the client to speak to their own goals rather than taking the role of "reporter" of the goals to the supervisor.



Leadership Development Plan

Reflecting Organizational Goals and Implications

First Meeting

In the first three-way alignment session, the coach's primary goal is to elicit a clear articulation from the supervisor or sponsor regarding what goals (if any) they have for the coaching or for the client. It is important for the coach to be clear that the client owns the outcomes of the coaching; in essence, these are client expectations. If the supervisor is under the impression it is the coach's job to achieve the outcomes, then it is an opportunity to clarify.

Facilitation

The coach is to facilitate the conversation rather than lead it. The coach will also solicit questions that the client might like them to ask the supervisor in the meeting. There are questions that a junior person might not ask their supervisor such as, "What do you see the biggest barriers for the client in achieving these goals" or "What strengths do you see the client bringing to these goals?"

Synthesis

After each alignment meeting, the coach and client should have a debrief session. The purpose is to record what each of them heard from the supervisor and the significance of these takeaways to the client and their coaching plan. Very often, I find the client focuses on the supervisor's immediate responses and will be looking for criticism, recognition, or defaulting to a lens that influences some of the feedback. Since the coach is not as vested in the supervisor's feedback, they can provide some clarity to what was said.

The coach helps the client articulate the takeaways and synthesize the information. This synthesis takes the client from what was said to new objectives or ways of looking at their objectives in the coaching. The coach will have asked the supervisor to define any next steps or metrics of success for the client and will ensure the client has recorded these as well.

Successive Meetings

When there is an alignment session at the middle of the coaching engagement, the coach helps the client prepare by having the client reflect on what they have accomplished. The coach encourages the client to consider any successes or barriers they would like to share with the supervisor. The client will report these to the supervisor and ask for any input.

For the final alignment session at the end of the engagement, it is important to pose the question of how the client will have ongoing support for the development goals they would like to achieve next. The coach and client will prepare for this by reviewing the engagement and discussing the client's next desired development goals. During this process, the coach and client can brainstorm where the support for the client will come from if the coaching terminates.



The number of alignment meetings should be designed at the beginning of the coaching engagement. Determine if there will be one meeting to launch the coaching or if there will be additional meetings in the middle and end. This will set the expectations of the supervisor or sponsor and help the client and coach feel prepared to articulate client successes.

