

Amy Gallie  
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## Appreciative Inquiry Coaching Training Certification Practicum

### I. Personal data

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### II. Permission

My client has granted his permission to tell his story both here in this report and on the Company of Experts.net. I have, however, changed his name, to conserve confidentiality.

### III. Coaching process

#### a. *Name and description of the role of the client (personal and or professional)*

My client's name is Michael Rosas. He is a 35 year-old Mexican man who has grown up in a bi-cultural context. He graduated from a prestigious international high school, and hence speaks English with one hundred percent fluency. He studied a B.S. in Marketing in Toronto, Canada. He returned from living abroad and has lived and worked in his native Mexico City for the past 10 years. In this time his career has shifted several times. He spent 4 years working for an LA-based marketing firm, as an expert in the Latin American market. He earned a high salary, traveled frequently to cities such as: Los Angeles, Miami, Buenos Aires, Sao Paulo, and Bogota, and had a "jet-setter" lifestyle as a young, good-looking, talented marketing executive.

After a few years of this, however, he grew tired. So, he quit the very full-time job and went to work as an independent consultant in the same field of marketing US products to Latin American markets. With a less demanding schedule, and more time for reflection, Michael began to turn his attention to his interior and spiritual side. He began to practice Bikram Yoga, and gradually it become an integral part of his life. He also began working with a psychologist to help him uncover and understand some aspects of his childhood and family life. Also, sadly, during this time, his younger brother died of a drug overdose. His bother's addiction and death affected him in profound ways.

During the timeframe of our coaching engagement (July of 2016 to the present) Michael has moved into another phase of his career and life. He has left the field of marketing altogether, and has turned his attention to his numerous hobbies,

several of which he is trying to develop into professional opportunities. His hobbies are diverse, and include interests such as: yoga, gardening, teaching, teaching yoga, photography and becoming an Air B and B host. On a more formal business level, he is currently involved in a small firm with friends in which they “flip” (buy and re-sell for a profit) houses as a business. He is very passionate about art, architecture and design, so the work he does is very interesting to him. He is also currently trying to “flip” a home he inherited from his father, so is at a bit of cross-roads personally and professionally. He is living in this house, in a neighborhood far away from his friends, and social scene, yoga studio, etc..

Also, as most of his savings are invested in the “flipping” business, he is living with very limited economic means. He lives with (and depends financially upon) his life partner, and their 6 dogs. Michael is using this in-between time as a space to re-examine many things about himself; the way he earns a living, what his true calling is, and also the future of his current romantic relationship. It is in the context of this fertile phase of possibilities that we began our work together.

*b. Brief description of the client’s environment and context (personal or professional)*

Michael’s context - personally and professionally for they are intertwined in his case - at the moment is one of a pause. He is 35 years old and is currently in a “taking stock” phase. The death of his younger brother, and the fact that he is currently living in the house that was his childhood home (although he hopes to “flip” this property in the near future) have greatly affected his mindset. After working in the field of marketing for nearly 8 years, he is currently searching for ways to bring more meaning into his life personally and professionally. With a fair amount of free time, due to the fact that he does not have full-time employment, he is dabbling with a number of interests in order to see which of them, if any, he can put at the forefront of his existence. The pause is poignant, and filled with possibilities for an intelligent, bilingual, talented and reflective person.

*c. Describe the process you used to identify the Topic and name the Topic*

In my initial pre-meeting with Michael, I asked him general motivational questions, mostly along the lines of, “Why did you come to see me today? What can we work on together?” He explained that he, over the past 6 months or so, has been in a “holding pattern” and feels that he is ready to make a move to the “next big phase” of his life, but is feeling paralyzed. He explained that he sees many paths forking before him, but is not sure, which one he should follow. After I explained the method of AI Coaching to him, he agreed that it might be a helpful process in order for him to advance.

Then, for our first “official” AIC session to begin the Discovery phase, I used the approach of asking generic questions to Michael in order to help guide him to identify and name the process of his inquiry. Because Michael is, by nature, an

exceptionally positive and reflective person, who has many interests and ideas, and a high degree of self-awareness, it was not necessary to have him re-frame his experience. His positivity about so many things is, in a certain way, a bit of a handicap for him. He is someone who needs to narrow things down to what is truly essential.

He came into the session fired up about an invitation that he had received that week to teach a course on entrepreneurship to a group of young people. So, I decided to stick with the topic that was so interesting to him, and we dove in together. I asked him to tell me about a time when he had taught someone something, when it was clear to him that he had clearly helped them to understand a concept, idea or skill. I asked him about how this close connection to another person had made him feel. I asked him about what he liked best about himself while he was teaching. I asked him what he valued most about the experience, and how he would like to perpetuate it in the future.

After talking about these experiences he uncovered what it was about the process of teaching that was so exciting for him; his ability to help others develop opportunities to grow. He talked about it in contexts as diverse as working on business plans with friends and teaching others to perfect their yoga poses. Michael came to the realization that in teaching others to grow, he also has been able to grow. From there he understood that he needed to tune into his own inner self, to come in alignment with himself, before he would be able to advance.

Through some back and forth, and a bit of rephrasing from me, Michael was able to name the positive topic of his inquiry. It is: **“Aligned to myself, I create my path.”** He wrote the topic down on a post it, and put it in his wallet. He said that he was going to try to incorporate it into his daily life.

d. Attach or include the modified interview guide you used to Discover into the positive core. **(See attached Interview Guide)**

e. *Include the core values that emerged from the Discovery interview*

The interview with Michael was, at first, an “easy conversation.” He answered with clarity and focus. He told stories of happy moments, and the difficult times of his brother’s death. The moment when Michael was most deeply connected to the topic, and to me, was when he described the process of reconnecting with his family, particularly his mother and sister, after the death of his brother. Things became quite emotional for him when I read him back some of the phrases that he had used in describing the split from, then reunion with his family.

With regard to the core values, Michael identified 3 that are key to him as he moves forward on his journey. They are:

- **Deep sense of purpose** – He came back again and again to the idea, that he values living deeply and reflectively. For him, a life based on marketing products in order to some firm to make money is not important, to him or to the world. He must live in a way, earn his living, so that everything resonates deeply with his self of self, and mission.
- **Transcendence** – Michael is a deeply spiritual person; as such he understands that his actions have many implications far beyond himself, and his immediate circle of family and friends. The sense of connecting with “what’s out there” is key to him.
- **Kinship with others** – He needs to be surrounded by like-minded others in order to succeed on his own path. He cannot travel alone.

*f. Include the wishes that emerged from the Discovery interview*

- **Wish #1** – Michael wishes that the right people will come into his life to allow him to create projects that are aligned with his life path. He pointed out that some of these people will be investors of some sort, who have the proper resources to help support him in his future projects.
- **Wish #2** – Michael wishes that people who are in need will find and approach him. He understands this it is his path to help others find answers. (They might be students of yoga who are looking for a teacher to help them further their practice. They might be young entrepreneurs hoping to start a socially responsible business with whom Michael can share his experience and business acumen.)
- **Wish #3** – Finally, Michael longs for a romantic partner who will support him emotionally on his journey. He does not need someone who is short sighted, and will push him “to get a job.” Instead he longs for a visionary kindred spirit to accompany him along his path to alignment.

*g. Include the Dream / image / metaphor that your coachee created and something about the process and / or questions you used in order to enable him to do so*

**(See attached photo of the drawing that Michael made)**

After Michael finished talking through his three wishes, he was in a very reflective frame of mind. He talked quite a bit about how he does not only need supportive people to help him along his way, but that he also needs people to challenge him, and to make sure that he, in fact, on the right track. At that point, I invited him to make a metaphorical drawing of his journey, one that would include the support and the push back. He created an image of a path in perspective, with a clear target, or goal at the end. In explaining the drawing to me, he pointed out that the path is “peopled with” many different individuals who have come alternatively cheer him on or pull him back. He represented them with different colors to show that he will need to work with each of them in different ways. I asked him to list off who some of the people were. He mentioned that his mother and sister were the most prominent, followed by his

life partner. He also mentioned friends from other eras of his life who would challenge his decisions, who might want to him to consider an executive lifestyle again.

I also asked him if the drawing had a spiritual context to it, mentioning that it had a sort of “stairway to heaven” feel. He said that it did, that by walking along the path of his own creation, that he would encounter a sense of transcendence, one of his core values. He summed up the drawing with the following phrase, “Alignment is getting to and being where you’re meant to be.”

*h. Include the Provocative Proposition that emerged from the Design phase and something about the process that enabled its design*

The process that led Michael to create a Provocative Proposition began with, at the beginning of our last meeting, his talking with excitement about a new business proposal which had come his way since our previous session. As he spoke about what it would involve, who his future partners might be, and what role he might play, I moved the discussion towards the exceptionally positive parts of the conversation. From this discussion a few key ideas emerged, areas where his face and gestures became open and alive. These ideas centered on: **friendship, bliss, creativity, and balance.**

He wrote the four ideas on a whiteboard, and I encouraged him imagine that the events of the next year or so of his life were a movie. I explained that he would be producer, director, and protagonist of the film. And the first step would be to come up with a working title for it. The title he created was: **“Creating Bliss in Joyful Balance.”** He spoke freely about the “movie” for a few minutes, and then I explained to him what a provocative proposition is, how it is a first step in designing one’s ideal future. He came up with a Provocative Proposition. Although it is a professional project, it also in alignment with his personal beliefs, which was a core part of his inquiry coaching process.

Michael’s Provocative Proposition: ***“I am an expert at creating initiatives that improve the living conditions of communities in need.”***

Together we engaged in a process of ensuring that the statement is, in fact, provocative, grounded in experience, bold, affirmative, and something that he does want to create more of. During this vetting process, his excitement began to rise, and he began to fill provide more details of how he could carry out a project of this nature.

I then asked if he had already taken concrete steps towards the initiative of the PP. He told me a story of how about a year and half ago he had visited an indigenous community in the Mexican state of Oaxaca. He talked about his feelings, explaining how he had been saddened and enraged by the injustice the community members faced on a daily basis. It was in the context of this group that

he had originally begun to explore the option of social entrepreneurship as an alternative to the market research that he had been engaged in at the time. He is carrying forward this excitement in helping others into the Destiny phase of the process.

*i. Include any areas for ongoing exploration in the Destiny phase.*

In the Destiny phase, he spoke about exploring his own vantage point. He pointed out that within the indigenous community, the members were largely blind to the injustices they faced. He, with the vantage point of an outsider – a Mexico City resident with an international focus, could help in designing a solution. As he moves into the future, he will be further exploring how his dual role (as insider and outsider in his home country) can be an asset to himself and his nation. The phrase he used that was very exciting to him, and to me as his coach was that of **“outsider catalyst.”** Michael’s involvement will allow him to help effect change in a community in need, and through a business plan that looks to develop local craftsmanship, he will provide a profitable business opportunity for himself. And, this project will allow him to be aligned to his own values and beliefs.

As he moves towards the future, he will inquire further into his values of justice, understanding, and kinship with others. In the long run, he will explore the possibility of starting up a foundation to help indigenous groups.

*j. Impact or results: What shift in attitude or process has the client made as he tapped into the Positive Core and created the Provocative Proposition? Where was the most energy for your client during the coaching process? What stories of success can you share?*

At the beginning of the coaching process, Michael was very task or project-oriented. He spoke about the need to “find a new way to make a living,” or develop a profession of “life after marketing.” He approached the change process from a position of “NOT THIS,” that is, what was not working for him in his former career and related lifestyle. Through the process of inquiry, and carefully examining his beliefs, dreaming up images of the future, his outlook changed. He went more from a frenzied state of asking himself, “What should I do next?” to “What’s important to me, and why?” This was a major shift in attitude.

I saw a shift in attitude with himself. In the beginning he was frustrated with himself, by his indecision, and “stuckness” between phases of his life. But, through inquiry, dreaming, creating metaphors, and finally the provocative proposition, he learned to observe himself, understand the need to slow down, and reflect about what’s really important to him before making a major move.

The highest point of energy for my client was in the writing of his “movie title,” or the naming process of the next phase of his life. He enjoyed brainstorming a list of core beliefs and writing them into his future life. He was very empowered by

the analogy of being “producer, director, and protagonist” of a creation that is totally his own. The leap to the Provocative Proposition, or action, was not difficult for him. He literally rolled up his sleeves and began to draft his PP.

I think this last image of Michael, sleeves rolled up on his perfectly white dress shirt, actively and excitedly designing his future, is the “success story” of the Inquiry. He transformation from someone who was angry at himself of not being able to make a decision, or take a leap, to the man at the whiteboard with the marker in his hand, designing, planning, talking, taking notes, was very inspiring. And the most gratifying part for me as his coach, was the authenticity of it. All of it came directly from him, and from his positive core.

#### **IV. Reflection on my own learning during the two coaching engagements**

##### *a. What did I wish for in the coaching?*

My own wish throughout this process was to internalize the AI Coaching methodology. That is, I wanted to master the technique to the degree that I could set my binder aside, and really listen to the person in front of me. As a starting point, I wanted to work with someone who was not familiar at all with the process, and use it from beginning through Destiny, to see how things would flow. Also, I have known Michael for many years, and have seen him grow frustrated with himself over the past few months, so I wished to help him move along his own life path. An appreciatively focused coaching engagement gave me the tools to do just that.

##### *b. When did I feel most alive and inspired in the coaching?*

I felt most inspired by the coaching process when I heard Michael speak about his relationship to his family members, mother and sister. The coaching process was largely initiated because Michael was struggling so much due to the death of his younger brother. Michael told me that he has always been a very dutiful son, and after the death of his father long ago, he has also had to play the role of the father on a number of occasions. Listening to him talk about the role of his family in his future plans was moving. He explained to me that loves them, and wants them in his life, but that he needs their support (instead of he playing the usual role of “rock” of the family). It was moving to hear his candid conversation about moving on, letting go, and creating his own life path. These are difficult subjects, and I was very honored by his trust, and tried to respond with empathy and professionalism.

##### *c. What emerged from working with two different clients – one from the program and another one from outside?*

Working with a client from within the program was very comfortable for me. She, Lynora, and I both spoke the same language, and it was very easy to jump into the spirit of the coaching. She was, from the outset, in a positive mindset and understood how the positive attracts more positive in her life. In working with the external Michael, it was not so easy to begin the coaching. I found myself going back and forth between wanting to explain every detail of the process of the AI Coaching and just

simply coaching. In the end, I did a bit of both. And, because he was not as familiar with the AI methodology, the impact of writing a Positive Proposition was almost magical to him. He was truly astounded how his own words and past actions hold so many of the indicators of where he should move in the future. What emerged for me was a renewed sense of how powerful an appreciative approach to problem solving is. I had seen, and facilitated, the good it could do in groups, but in working with these two people, I learned about the benefits it can have on the individual level.

*d. What did I learn about my coaching in the process?*

In the process I learned quite a lot about my coaching. I learned that listening is for sure the hardest part of the coaching process. The side of me that wants to guide the process, and ask the right questions, and move onto the next phase was a bit hard to shut up, frankly. I did find myself, reciting a little mantra to myself several times through both processes. It was, “**shut up and listen.**” So, as I move forward as a coach, what I will take away is that listening self, that does not want to interrupt or control the client, or make meaning.

*e. What did I learn about myself in the process?*

I learned quite a bit about myself in the process of coaching Michael. As I stated above, I learned that I need to make a concerted effort to shut up and listen to others. I also learned that I need to trust the AI process; that its design will guide the client and that I don't need to “push things” quite so much as I naturally wanted to. It's interesting that this is exactly the same experience I had with AI Facilitation. The first time I facilitated an Inquiry, I was very nervous about what the outcome would be, but in sticking with the process I watched as meaning was made authentically by the participants. So, in both types of AI I learned that I must resist the urge to meddle.

*f. What would I like more of in my Appreciate Coaching process?*

In my Appreciative Coaching practice, I would like to work with more clients, and with a variety of clients. Michael's process was largely about a personal crossroads. I would like to coach someone else in terms of a work situation, or perhaps a stage-of-life transition. I would like to explore how an appreciative approach might be helpful to someone working through a decision to get married, start a family, adopt a child, get divorced, etc.. In short, I would like to do more coaching, with a broad range of clients.