

A brave new world: coaching online

Advances in technology are having a profound impact on the way we communicate with clients and deliver our services. The co-founders of the Online Coach Institute, **Kate Anthony** and **DeeAnna Nagel** explore the practical and ethical issues involved in using technology to deliver or enhance your coaching practice

The use of technology for offering coaching services has a less troubled history than that for psychotherapy and counselling. That said, it is evident that this particular choice for service provision needs careful consideration, particularly in light of what is known as Web 2.0 technologies - the community-based platforms such as Facebook, Twitter and LinkedIn that pose such a threat to privacy and confidentiality. Even with the third edition of the *BACP Guidelines for Online Counselling and Psychotherapy (including Guidelines for Online Supervision)*¹ (fourth edition in preparation), the need for constant updating as technologies develop and the need to reach out to the coaching profession in the same way is very clear. The third edition of the BACP Information Sheet P6 (Introduction to Online Counselling and Psychotherapy, Anthony & Goss, in press²) will be extended to include coaching as part of the wider brief in light of the creation of the coaching division.

As co-founders of the Online Therapy Institute (OTI³), a think tank, education, networking and training organisation, we recognised the need to expand our services and products to encompass the profession of coaching back in 2010. As a sister organisation, we created the Online Coach Institute (OCI⁴) to ensure that our expert knowledge as academic and practising leaders in the field, was able to be translated to the coaching arena. Within this article, we will define what technologies are used in coaching, consider some benefits and pitfalls in its use for professional services, discuss the importance of training and awareness of ethical issues and finally look at the future of coaching in virtual environments online. We will also introduce a brief case vignette for illustration.

What do we mean by the use of technology in coaching?

Although there are many uses of technology in running a coaching business - from the use of email to talk with colleagues to using scheduling or accounting software - we refer to the use of technology to specifically communicate with a client for the purpose of coaching (including setting up coaching sessions). There are six main technologies that are currently being used for this:

- Telephone
- Voice over Internet Protocol software (VoIP, such as Skype)
- Email
- Chat and instant messaging (IM)
- Online forums
- Videoconferencing.

In addition, there is a plethora of self-coaching software online; the use of text messaging and SMS; and the use of virtual reality (VR) environments to offer coaching, such as Second Life or Reaction Grid. We will cover the use of VR and what that looks like later in this article.

Each of these technologies comes with its own particular benefits and pitfalls. Furthermore, there is much debate as to whether a coaching relationship established solely via use of text-based delivery such as email and chat, can constitute a stand-alone coaching session or whether an aural and/or video component in real time must be utilised. Technology-assisted coaching is considered to be a coaching relationship that is enhanced by the use of technologies such as chat and email but is not used as the primary method of delivery for coaching sessions. This summarises the position of the International Coach Federation (ICF)⁵.

Furthermore, the aforementioned Web 2.0 aspect of the internet means further exploration of what implications they have on client-coach communication is not only desirable but ethically required. For example, if you reject a request from a client for friendship on Facebook, is that likely to damage the coaching relationship? If you have many connections on LinkedIn, how long will it be until the rule of six degrees of separation means that your client will be identifiable to your colleagues? If your client follows you on Twitter and regularly tweets or retweets your services, or DMs (Direct Messages) you, is that a blurring of the boundaries of the coaching relationship? While it may be argued that damage caused through ignorance of these issues may be less than those posed by vulnerable therapy clients, the coaching relationship remains just as threatened, and discussing these potential boundary issues as part of the coach-client informed consent process can stave off potential problems.

What are the benefits and pitfalls of using technology in your coaching service?

Firstly, it should be recognised that talking about distance provision of services is no longer thought of as unusual. It is becoming increasingly mainstream, and research shows that coaches use distance communication frequently and have done for a long time⁶. However, the research also shows that coaches have not historically thought much about the use of technology within their practice or with their clients. At a recent BACP Coaching division networking event in Elgin, the presenters identified 15 main considerations in using technology for coaching practice:

“

Exploring the implications of Web 2.0 on client-coach communication is not only desirable but ethically required. If you reject a 'friendship' request from a client on Facebook, will that damage the relationship?

”

- Fears around translation of techniques to the technology
- Learning how body language communicates over the telephone
- Lack of guidelines
- Lack of knowledge about how comfortable the client is with technology
- Translation of orientation/modality to the technology
- Knowledge of the client experience of you at a distance
- How to protect information/privacy
- Cross-cultural awareness
- Transition care (end of session; end of contract)
- Lack of knowledge as to how your voice sounds
- Lack of knowledge as to special contracting needs
- Insurance issues
- Lack of knowledge around legalities
- Lack of inter-jurisdictional knowledge
- Pace, tone and accent issues (for both voice and text-based work).

These fears are all very valid, but none are insurmountable. As an organisation, the Online Coach Institute exists specifically to address, educate and train coaches to overcome these fears in order to take advantage of the many benefits of working with technology, such as:

- Time shifting benefits with asynchronous communication
- The disinhibition effect⁷ meaning that the work often develops faster and at a deeper level
- Reduction in overheads for travel and office space

- Reduction in 'extraneous noise' experienced in face-to-face communication
- Accessibility in light of the breaking down of geographical barriers
- Additional techniques and resources available online
- Reduction of stigma of being seen to receive coaching services
- The concept of a level playing field ('on the internet, nobody knows you're a dog')
- Accessibility in light of disability preventing other contact
- Using Web 2.0 facilities to ethically market and promote your practice.

Case vignette

James is a busy manager of a large private hospital administration department. His key role includes the admission of patients with serious mental health problems, for whom he often feels responsible. Although his contact with the patients is minimal, he struggles with what he perceives as a power role over people he knows nothing about, which has led to increased stress recently with the appointment of an under-manager. James is considering long-term sick leave. The new employee's gung-ho attitude to his work is causing problems for James, and his own line manager arranges for funding for some coaching to help James feel more in control as a manager and less affected by the perceived responsibility of his job. The first step within the coaching process is to identify, via an online intake form for the coaching company the hospital employs, the key area James feels he needs to work on.

James identifies his goal as 'I recognise I take on too much emotional responsibility, but also recognise where a lessening of that could make my life less stressful and a better manager in helping other employees function as professional administrators. I strive to be an excellent Admissions Manager but need to be objective within the role.'

James receives an encrypted email from the coach he has been referred to, Sarah. James was offered three methods of delivery: in-person; telephonic; or asynchronous (email) exchanges. He accessed coaching services benefits through his EAP/wellness programme at work. He was offered six sessions. In-person and telephonic sessions occur in real-time and are one hour in length. For asynchronous sessions, one back and forth exchange (client email and coach response) is the equivalent of one session. With less overheads, technology-delivered services can

be more cost-effective. The coach also explains to James that he can discuss with her the option of a combination, and so they devise a coaching contract that includes two telephone conversations at the start and end, with a maximum of four email exchanges in between.

Sarah and James have a one-hour telephone conversation to ensure what James has identified as his core goal is correct, and they discuss what could stand in his way to achieving this, identifying the best outcome and what he needs to work on to overcome obstacles. Over the next month, they exchange encrypted emails once a week, examining progress; what is working for James in identifying different strategies to cope with stress, such as increased exercise after work; and deciding on the next steps to achieve before their next email session, such as asking for more support from his line manager in discussing with the new employee how his new position needs more of an element of care for the end-user of the admissions process.

For the sixth week, James and Sarah try to book a telephone session to end the contract. However, this coincides with James being away at a conference abroad, and so they look at further options that would not incur international telephone charges. They use a secure encrypted VoIP software service which means that James can log in from anywhere in the world with a good internet connection (such as his hotel), and they are able to also use video to see each other to close the contract and say their goodbyes. James feels his coaching relationship with Sarah has been fully enhanced by the technology, allowing him distance when he needed to examine and share his often personal feelings, and yet know her via her voice, her written communication skills to move the work forward, and finally a visual so that the professional relationship could end as scheduled and with a strong sense of closure.

The importance of training and ethical education

The ethos behind both our Institutes is that practitioners - however well intentioned - don't know what they don't know until it is often too late to rectify the situation they find themselves in. Anecdotally, it has been acknowledged that complaints involving some use of technology (for example, inappropriate texting; use of unencrypted forums to discuss client material) are among the highest received by professional organisations. To address this, our focus has been and remains the provision of two main routes to working ethically and efficiently online.

- 1 'The Ethical Framework for the Use of Technology in Coaching'⁸. This framework is founded on our original research in providing a framework for the use of technology in mental health, based on suggested principles, guidelines and advice from five major international professional organisations, including BACP. Other ethical frameworks regarding the use of technology are also available: for EAPs; disaster mental health; career and school guidance; and the use of social media. We offer ethical verification of online services to ensure practitioners are working to the appropriate ethical framework.
- 2 We offer self-paced, self-directed online training modules of five hours. While the majority of these currently focus on the therapist, counsellor and supervisor, three are designed to help the coach: An Introduction to Cyberspace; Relationships in Cyberspace; and Introduction to Online Coaching: Methods, Ethics and Responsible Social Networking. In development are Motivation: A self-Coaching Programme (three hours); Cognitive Behavioural Coaching (10 hours); and a full 40-hour Certificate in being an Online Coach. All our current trainings at the time of writing (October 2011) are endorsed by BACP, including the coaching modules, and are also eligible for CE credits in the USA. BACP endorsement shows that Online Coach Institute activities are relevant to the professional development of coaching professionals, at a level appropriate for the target group, and are designed and organised in a manner consistent with achieving the stated aims and objectives.

The future of coaching in light of technological development

A few years ago, we asked the following questions at the first annual conference for Counsellor Educators in Second Life (CESL):

- How can we teach counsellors counselling skills in a virtual world setting?
- How can we teach counsellors how to counsel within a virtual world setting?
- Are the skills that are learned in a virtual world classroom transferable to face-to-face therapy sessions?⁹

Now we are asking these same questions as they apply to the field of coaching. We are currently exploring the best ways of training coaching practitioners to use virtual environments, to ensure ethical and competent practice when those environments become

mainstream, as the use of text, audio and video are already in many areas of both the therapy and coaching professions.

The following is an exploration of three different and unique coaching techniques as applied to virtual world technology:

Vision boards

Many coaches use exercises to engage their client, such as the use of a vision board. A vision board is typically a poster board that the client utilises to create a collage of images cut or torn from magazines or newspapers. The idea is that when the person is surrounded with images of who they want to become, what they want to have, where they want to live, or where they want to go on holiday, their life changes to match those images and those desires.¹⁰ Now vision board software such as Vision Board Studio¹¹ exists so that clients can create vision boards on their computers or mobile devices. Futuristic coaching will allow vision board creation within virtual worlds similar to Second Life. The vision board becomes a three-dimensional collage that can be easily modified.

Career and executive role-play

Practical skills like job interviewing and appropriate dress can be role-played in a virtual world. In fact, in Second Life one can shop for clothes, accessories and make-up. Inworld Solutions is a web-based virtual world platform that can be used by therapists, coaches and educators. The website offers video demonstrations of the use of the platform including a video that captures training of managerial staff.¹²

Narrative coaching

Drake¹³ states, 'A narrative approach to coaching focuses on helping clients become more aware of the contours of their available narratives and either reframe this available stock of knowledge or their relationship to it. The goal is to discover and develop new art of thinking narratively options - often hidden as gems in the client's own stories.' In a virtual world, coaches can enlist clients in creating stories complete with visual 3-D effects. With artificial intelligence the possibility exists for scripted responses from another avatar to become part of the narrative - coaches and therapists can assist clients in creating new endings to their personal stories.

Conclusion

The future of coaching in light of technological development will no doubt include more blended

uses of technologies in which multiple forms of communication delivered via technology will be used simultaneously, as we saw happen with James and Sarah. Multimedia web-based platforms similar to Facebook will be developed and virtual worlds will be branded strictly for the helping professions. These new platforms will be user-friendly, confidential and cost-effective. The questions about whether or not an email exchange or a chat session using an instant message program can stand on its own as a viable coaching session, will likely be moot points as we wade through many viable methods of technological delivery ranging from a phone call to virtual worlds. ■

Resources

www.onlinecoachinstitute.com

www.therapistsandcoachesopentotechnology.com

www.onlinecoachsocialnetwork.com

TILT - www.onlinetherapymagazine.com,

Twitter: [@onlinecoachtech](https://twitter.com/onlinecoachtech), [@kateanthony](https://twitter.com/kateanthony), [@therapyonline](https://twitter.com/therapyonline), [@TILTmag](https://twitter.com/TILTmag)

Kate Anthony, DPsych, FBACP, OMAC and **DeeAnna Nagel**, LPC, DCC, OMAC, are leading experts on the use of technology in mental health and coaching, and have trained practitioners and organisations worldwide in working with technology for over 10 years, endorsed by BACP. They are co-editors and co-authors of textbooks on the subject, as well as numerous articles, chapters and journals. Kate is co-author of the BACP Guidelines for working online, and Executive Specialist for Online Coaching for the division. Both authors are co-founders of the Online Therapy Institute and the Online Coach Institute, and Managing Editors of TILT Magazine (Therapeutic Innovations in Light of Technology) and are former Presidents of the International Society for Mental Health Online (ISMHO).

References

- 1 Anthony K. Goss S. BACP Information Sheet P6 - Online counselling, psychotherapy and coaching. Third edition. Lutterworth: BACP; in press.
- 2 Anthony K, Goss S. BACP information sheet P6 - Online counselling, psychotherapy and coaching. 3rd Edition. Lutterworth: BACP. In press.
- 3 www.onlinetherapyinstitute.com
- 4 www.onlinecoachinstitute.com
- 5 Labardee L. Technology enhanced coaching. Therapeutic Innovations in Light of Technology. 2010; 1(4)40-41.
- 6 Goss S. Online coaching research - the future is bright! Therapeutic Innovations in Light of Technology. 2011; 1(4)14-17.
- 7 Suler J. The disinhibition effect. 2004. <http://users.rider.edu/~suler/psycyber/disinhbit.html>
- 8 Labardee L, Nagel DM, Anthony K. An ethical framework for the use of technology in coaching. Therapeutic Innovations in Light of Technology. 2011; 1(4): 20-28.
- 9 <http://coachingcommons.org/featured/coaching-in-a-virtual-world/>
- 10 <http://christinekane.com/blog/how-to-make-a-vision-board/>
- 11 <http://www.visualizeyourgoals.com/>
- 12 <http://www.inworldsolutions.net/learn-more/video-demonstrations>
- 13 Drake DB. The art of thinking narratively: implications for coaching psychology and practice. Australian Psychologist. 2007; 42(4):283-294.

