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Instructor, Coach, Mentor: Three Ways of Helping for Managers

David Megginson

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WORKSHOP

INSTRUCTOR, COACH, MENTOR: THREE WAYS OF HELPING FOR MANAGERS

DAVID MEGGINSON   Sheffield City Polytechnic

> I always tell my staff exactly what to do.

> We work out together what's getting in the way of our performing better, and then my staff go off, and do something about it, coming back to me if they're in difficulty.

> Being helpful can mean challenging and confusing those you help. The people I work with find it difficult at first to consider what they're working for; what task they are attempting to carry out in their lives. I still find these questions difficult too!

These three quotations suggest three ways that managers can help their staff. I have labelled them 'instructing', 'coaching' and 'mentoring'. In what follows I differentiate a number of features of the three approaches. I then describe questionnaires designed to measure the use of each approach, and report results from one organisation. I conclude by considering some practical issues in using the three approaches.

Before you read on, you may like to explore your own preferred mode of being helped. You can do this exercise best if you've had a number of bosses. If you have not had any bosses, then think about the teachers you've had instead.

Think of all the bosses (teachers) you've had. Use Table 1 to make a note of their names in chronological order. Write down one or two words which describe each of them. Now, surveying the list, who would you describe as the best boss? It may be immediately apparent. If not, sort out the star among the potential candidates in terms of *'who was the best boss for you?'* Who developed you, and enabled you to take the next step in your life, whatever that may have been at the time?

When you have settled upon who wás your best boss (or teacher), then describe that person and your relationship to them in a bit more detail. You may want to focus on what they did; how they did it; how that was different from other bosses; what effect this had on you; why this was right for you; what developmental task you were carrying out at that time. Keep these notes and I will refer you back to them later on. You may like to use Table 1 to note these points.

TABLE 1   My Bosses — Chronological List:

My best boss ....   *My age while she/he was my boss ....*

What my best boss did	How I responded	What I was doing as a person at the time – my developmental task

Table 2 outlines the three different ways of helping that I have identified. I flesh out this summary with examples and illustrations below:

THE INSTRUCTOR
Good instructors plan out in detail what they want of their learners; they convey these instructions carefully, repeating key points, and encouraging note taking if appropriate; they check that the instruction has been accurately received, asking the learner to repeat back what they have been asked to do; they also check to ensure that the lesson has been put to work, and let the learner know the results.

These activities are the ones beautifully presented in the TWI Job Instruction package. Their focus is an immediate performance of a work role. One advantage for a subordinate in having a good instructor as a boss is that one is never left in any doubt about what they want, or where one stands. Good instructors are committed to *building the competence* of those they instruct. They want and expect accurate performance from their staff. If they get this, they have the satisfaction of a job well done, and the knowledge that they are in control of standards. The organisation gets performance that is predictable and meets specification.

EXAMPLES OF BOSSES WHO ARE INSTRUCTORS
■ FREDA is a manager of a unit of a contract catering company which serves the staff of a medium-sized factory and office block. Her staff are

TABLE 2   Three ways of helping for managers

Dimension	Instructor	Coach	Mentor
Focus of helping	Task	Results of job	Individual person developing through life
Timespan	A day or two	A month to a year	A career or a lifetime
Approach to helping	Show and tell Give supervised practice	Explore problem together Set up an opportunity for learner to try out new skills	Act as a friend willing to play the part of an adversary Listen Question to enlarge consciousness and listen some more
Associated activities	Analysing task, clear instruction, supervising practice, immediate feedback on errors, consolidation	Jointly identifying the problem, creating opportunities for development, developmental reviewing	Linking work with other parts of one's life, clarifying broad and long-term pictures, identifying one's life-purpose
Attitude to ambiguity	Eliminate it	Use it as a challenge Encourage learners to puzzle things out	Accept it as being an exciting part of the nature of the world
Intended outcomes for the learner	Accurate performance of specified task at appropriate times Learner knows just where s/he stands	Improved results Increased capacity for independent work and performance Learner knows what s/he can achieve	Questioning of previously held assumptions about work and life Enlarged consciousness Learner knows where s/he is going
Potential outcomes for the helper	Satisfaction Control of standards	Satisfaction Learners who are self-motivated and developing	Questions for self Fulfilment
Benefits for the organisation	Performance that is standardised, accurate and predictable	Performance that is both goal-directed and oriented towards improvements; creative solving of new problems	Conscious, questioning approach to the mission of the organisation

taught the detail of their jobs, and are given refresher training on health, safety, hygiene and quality at regular intervals. She keeps a watchful eye on how jobs are done and points out deviation from performance in a friendly manner. She checks how customers of her canteen find the service, and feeds back praise to her staff while taking action to remedy complaints.

Most of her staff like her, enjoy the work and the company and have been with her for a long time. One or two younger staff resent 'her interfering ways', and find they 'have little opportunity to get on'.

■ DON is City Secretary and Solicitor of a town in the North of England. He has a lawyer's eye for detail, and he checks and double checks all his staff's work. This keeps him very busy. He works long hours, and expects the same dedication from his staff. He sometimes gets angry when standards are not met, or staff don't seem to care. At times like this he redoubles his efforts to get things done right.

Some of his staff respect him and see him as 'firm, but fair'. He is known to 'run a tight ship', and that is seen as better than 'not giving a damn' which characterises the style of some of his Chief Officer colleagues. Other staff feel that he is obsessed with the minutiae of work, and doesn't give enough attention to what the department is trying to achieve. They point out that, while some of the staff feel pressured and overworked, others don't have enough to do, and spend long periods gossiping or reading the paper, when they can get away with it.

These two examples illustrate how an instructing approach to helping, while having many advantages, also has drawbacks. Instructors can be blind to learners' needs to take responsibility for themselves; to risk, make mistakes and learn from them; they can be bound up in detail and not give enough attention to results or to the career needs of their staff.

THE COACH
In our book on coaching (1979) Tom Boydell and I describe coaching as:

> a process in which a manager, through direct discussion and guided activity, helps a colleague to solve a problem, or to do a task better than would otherwise have been the case (p. 5).

As this definition indicates, the coach's way of 'helping' involves exploring an opportunity or a problem together with the learner, and then enabling the learner to develop new knowledge, skills and competencies in working on it. The stages in the coaching process are:

■ identifying the problem;

■ creating a forum for development;

■ carrying out the developmental activity;

- developmental reviewing, i.e. reviewing to enhance learning, rather than to be critical.

The good coach will encourage the learner to play the maximum part in all these activities and will offer support and assistance when necessary. Often the support will come in the form of a question, or a tentative suggestion ('One thing you could try . . .'), rather than a specific proposal. However, skilful coaches recognise that learners vary in their capacity to cope with ambiguity. They therefore attempt to give learners the right mix of direction and choice, so they are not oppressed by overdirection nor immobilised by open-endedness.

Managers have two foci when they are coaching. One is improved task performance, the other is learning and development. They are concerned about how some immediate aspect of work is performed, and aim to improve this. At the same time, they are also keen that learners are better able to solve the next problem more independently themselves. Many learners thrive on this dual sense of achievement of task and personal development. If instruction is about building competence, coaching is about *building performance.*

These benefits apply also to the coach. Coaches themselves often learn a great deal in the process of coaching. The organisation gains from goal-directed performance, oriented towards improvement, and also from a creative approach to problem solving.

EXAMPLES OF BOSSES WHO ARE COACHES
- DEBJANI is an Area Sales Manager for a microcomputer firm. She has six salespeople working in her area and a number of technical and administrative support staff.

  When she first got the job she accompanied each of her sales staff on a number of visits, on the understanding that she did nothing during the visit beyond the formalities, but after each visit the salesperson spend half an hour talking through what they were trying to do and why they thought this the right strategy. She took notes, but gave no feedback at this stage.

  When she had spent some time with all six she announced the first of what became a series of quarterly 'play away days' in a local hotel. She spent an hour presenting her view of the goals for the Area, and then, through discussion, came up with an agreed Area strategy. The rest of the day was focused on each sales person saying what they could contribute to this strategy, and what needs they had. At this stage Debjani offered her feedback and also invited comment from colleagues.

  Each salesperson does at least one accompanied visit per month. All of them have a development project underway, which is reviewed monthly.

  This worked fine for five of the salespeople, one of whom broke all

company records and was promoted to manage another Area. The sixth was a successful, easy-going salesman with a lot of contacts who had a golf handicap of 4. He left shortly after she joined . . . to run a pub.

■ KENNETH is a Head of Department in an Institute of Higher Education. He is ambitious and driving in his own life and is dissatisfied with the rut into which many of the lecturers in his Department seem to be stuck.

He has attempted to introduce an appraisal scheme, with twice yearly interviews for all his staff. This has been welcomed by a minority but many were indifferent, and a few resisted fiercely. This hostile group brought in the Union, which led to the scheme being withdrawn. Kenneth then attempted to clarify the duties and responsibilities of each staff member and, in particular, to encourage senior and higher-paid staff to take on responsibilities commensurate with their status. The Union and those previously hostile to him strongly supported this. Some staff challenged by this move were evasive and resistant. This included not only the more notorious deadlegs in the Department, but also one or two more creative individuals.

Once again, the examples are intended to show that coaching, like instructing, has problems as well as advantages. Kenneth tended to start from structures (appraisal and job design). He was also operating in what Henry Mintzberg (1983) describes as a professional bureaucracy: this person-centred type of organisation is one where a task-oriented (or, even worse, a power-oriented) coach will have a hard time. Even Debjani didn't win them all, and indeed talented individuals are often hard to help through coaching.

THE MENTOR
Mentors are much in vogue in the management and the training literature. Rather often, I find, there is a certain vagueness about their role and contribution. In particular, what they are supposed to do often sounds very like what I have here called coaching (see for example Sangster, 1985).

I think that there is a valid distinction between coaching and mentoring. While coaching builds performance, mentoring is concerned with *building a life's work*. The focus is on the learner's development. While instruction is broken down into *small steps*, and coaching focuses on a *discrete task or project*, mentoring is more diffuse and concerns helping the learner through life crises or into new *stages of development*. One lovely book which describes clearly the mentoring role of adult educators is Daloz's *Effective Teaching and Mentoring* (1986), which persuasively combines examples from literature, e.g. Virgil's guidance of Dante through the Inferno, with verbatim reports of contemporary mentoring dialogues.

The process by which this is done seems to differ widely between mentors. Not all them are patient Rogerian saints. Often they can place exacting demands on their learners and throw them into challenging situations.

Mentors however are not martinets. They are shrewd enough to listen closely and to relate what their learner says to some wider awareness of how the learner might be. Mentors often seem to have a well developed philosophy of life, and to operate on a spiritual dimension, as well as intellectually and emotionally. They ask a lot of questions and I suspect, though I have only tested in one or two cases, that, whereas coaches focus on 'How?', mentors also ask 'Why?' They are good at linking different bits of their learners' lives – home and work, success and failure, concrete and abstract, thought and feeling, hard and soft. They are happy to consider the long term.

The outcome of this process for the learner can be perturbing; it can also lead to breakthroughs, peak experiences, which are remembered with feeling decades later.

As with coaches, the process is not all one way and mentors learn, acquire insight and challenge alongside their learners. Often the questions the mentors face will be very different from those of the learner, but the developmental process is contagious and the mentor is not immune.

For the organisation, the effects of mentoring are a little unpredictable. Sudden major improvements in performance can happen, but learners can also leave the organisation if they decide that it no longer serves their purposes. If they stay, they may also have a more questioning approach to the mission of the organisation.

EXAMPLES OF BOSSES WHO ARE MENTORS

■ STEPHEN is Director of a Quango providing advice and training to Commonwealth countries on health matters. He is in his late 50s, and over the last ten years has recruited into the organisation a series of talented young staff, often against the advice of colleagues. Sometimes he is accused of favouritism. However, he seemed to get extraordinary results from these favourites, putting them into challenging overseas assignments, where they often find themselves managing people older and more experienced than themselves. One woman he appointed said, 'He made me realise I could do anything if I put my mind to it. He'd give me difficult work and, because I never wanted to let him down, I did it. In return he used to talk about his work and its problems. Apart from my family, he is the most important person in my life'.

■ LYNNETTE manages a voluntary organisation working with the homeless. Many of the people working in the organisation start as volunteers and she tests their mettle before giving them paid employment. She does this by an apparently relentless process of probing and questioning. Her office is sometimes called 'the wringer'.

She is clear about what the organisation is for, and is intolerant of people who use it as a political platform or to indulge themselves in good works.

People in the organisation seem either to love her or hate her. Those who

hate her don't last long. Sometimes those who leave say later that she was too big for them.

These examples illustrate the disadvantages as well as the advantages of mentoring. Such a demanding social process is bound to be divisive, and, while providing powerful opportunities, also presents difficulties too great for some.

DIAGNOSING WAYS OF HELPING

As one strand in my exploration of on-job helping by managers I have designed a questionnaire which explores the extent to which a manager uses each of the three approaches. There are two versions, one for managers to complete concerning themselves, one for subordinates to complete concerning their managers. The questions used in the subordinates' version are given in the Appendix.

In one organisation a group of middle managers invited to attend a workshop about on-job development completed the questionnaire about themselves and gave it to some subordinates who returned it to me so I was able to aggregate scores before feeding them back to the bosses.

It was interesting to note that while approximately 30% of the bosses saw themselves as more mentors than coaches or instructors, only 15% of their staff saw them in this light. Approximate figures are given in Table 3.

TABLE 3   Percentage of managers scoring highest in each way of helping: self-report and subordinates' view

Way of helping	Manager's self-report $(n = 17)$	Subordinates' view $(n = 35)$
Instructing	40%	60%
Coaching	30%	25%
Mentoring	30%	15%
Total	100%	100%

The questionnaire is not intended to indicate a right or wrong answer, of course. It is as yet a far from perfect instrument and even when it is developed further it will still be limited by the drawbacks of all such opinionaires. It does, however, provide a check for managers on their own helping style, posing such questions as:

■ Do I agree with the pattern of helping the self-report questionnaire suggests I use?

■ If not, what pattern do I think I use?

- Does my perception of my pattern of helping fit with my staff's perception?

- If not, what can the discrepancy tell me about how my staff see me?

- What do I want to do about this?

The data feedback also opens up questions about *whether all staff need the same approach to development*, and about *whether managers can change their way of helping*. The data also raises for me the question of *whether different organisations encourage a particular way of helping*. These three issues are dealt with below:

DO ALL STAFF NEED THE SAME KIND OF HELP?
Table 4 presents a model of stages of development, which I have borrowed from Malcolm Leary, Tom Boydell and others' work for MSC on qualities of managing. (Leary *et al.*, 1986). Like all such models it is schematic and indicates what might happen, rather than precisely what does happen for any one individual, or even indeed an average pattern of development that actually takes place. Rather it presents a framework for how development can occur, based on a notion of our purpose in life, which embraces development of our intellect, feelings, self-concept and spirit.

This model helps me to make sense of the data coming from my research into the ways of helping used by 'best bosses'. A lot depends on the stage of development of the learner at the time they were helped. I am tentatively surmising that each transition from one stage to the next has a need for a particular style of helping. These styles are indicated in the third column of Table 4. At this point, you may like to return to the thoughts you had about your best boss. If you can determine which way of helping your best boss used, and which stage of development you were at when you were helped, then you can check for yourself the validity of this aspect of my conclusions.

One point that seems to cut across these conclusions, and is emerging from work on self-development (Pedler and Boydell, 1985) is that the kind of help I have called mentoring may be particularly appropriate for helping people over *any* transition *between* stages, whereas coaching and instruction contribute more to development *within* stages. It seems to me that the transition between Stages 3 and 4 – introducing the ego – and the transition between Stages 5 and 6 – widening the focus of concern beyond the ego – are particularly difficult without a mentor.

CAN MANAGERS CHANGE THEIR STYLE OF HELPING?
This question was highlighted for me by the following incident. One of our full-time students, a man in his early twenties, commented to me how helpful one of my colleagues had been in helping him work out a direction for his life. When I mentioned this cheerful bit of news to my colleague, he complained, 'Yes, it's a complete pain to me being a mentor to these young Turks. Here I am at the age of 42, at what should be the most productive period of my life, sitting around helping others. I've got too much that I want

TABLE 4   Model of stages of development

*A. Stage	*B. Nature of next developmental step	C. Style of help needed to move on	D. Styles that people at this stage can use
1. Adhering to rules and procedures	Start querying, modifying standard procedures, seeking explanations	Instructing	Instructing
2. Responding by adapting, modifying and controlling rules, procedures, people	Seek explanations. Build understanding that goes beyond skilful manipulation or authoritarian use of power. Be open to feedback.	Coaching	Instructing
3. Relating to norms and conventions	Question & challenge accepted ways and reasons. Are reasons given valid. Can you find a better way. Seek wider experiences to explore own ideas	Mentoring	Instructing Coaching
4. Experiencing things and learning from experience	Deepen interests. Seek views of others, to explore how these relate to yours	Coaching Instructing	Instructing Coaching
5. Experimenting and deliberately trying to find out more	Broaden out again. See the whole picture. Build cross-connections with views of others	Mentoring	Instructing Coaching
6. Connecting, linking separate parts, ideas, people together	Seek your special purpose. Ask 'why on earth am I here? What am I doing with life?'	Mentoring	Instructing Coaching Mentoring
7. Integrating yourself with the world and dedicating yourself to life task	I guess this may be enough for most of us	?	Instructing Coaching Mentoring

* Columns A and B adapted from Leary, M. *et al.* (1986), *The Qualities of Managing*, Manpower Services Commission.

to achieve in my own work to be ready to give a lot of energy to this sort of time-consuming dialogue'.

This comment started me thinking about the ages and stages of helping and Column D in Table 4 represents an initial attempt at specifying the ways of helping that managers are able to use at the various stages of their own development.

Clearly, as we develop we are able to embrace a wider range of helping approaches, but it must be remembered that not everyone of increasing chronological age develops through to later stages in the model. In fact, it is precisely the difficulties in the way of doing so that generate the need for a helping hand from managers and other people.

WAYS OF HELPING AND ORGANISATIONS

In pursuing the link between helping and organisations, I will use Roger Harrison's oft-quoted typology of organisation cultures (See for example, Handy, 1985):

Power
Role
Task
Person.

How do my three ways of helping fit into Harrison's cultures? At this stage I have no empirical data to test my proposed response to this question. It seems to me there may be a connection between each culture and the kind of help typically offered. This is not to say that this help is *appropriate*. Simply that it is the most likely type to be available. One implication of this is that if you recognise an organisation in which you are working as having one type of culture, you may also recognise the types of help which will not be readily available, and those which may have to be fostered.

I suggest that:

- *power* cultures *discourage helping* in general;

- *role* cultures value the precision and predictability of *instructing*;

- *task* cultures emphasise results and therefore key into *coaching*;

- *person* cultures naturally connect with the whole life approach which characterises *mentoring*.

If there is any substance in this linkage, then what are their implications for managers and management development?

I think that for managers, if they want to use the way of helping reinforced and encouraged in their organisation's culture, then they will, by definition, be rewarded at least in terms of being seen to fit in. But what if their helping is counter-cultural? Clearly they will tend to experience hostility, but will this always be so? I think not.

One of the things about development in organisations is that there are all kinds of backwaters and havens where the dominant culture does not prevail. So if you as a manager see a need for a particular kind of development which runs counter to the organisation's culture, my message is, 'Don't despair'. I have found cases, for example, of managers in role organisations, creating a strongly task-centred culture, and coaching their people out of role-oriented behaviour. It just seems like a lot harder work when you're going against the organisational grain.

CONCLUSION

I am suggesting that the different methods of helping staff by off-job training have long been established (case studies, experiential exercises, lectures, etc.) A similar focusing of different methods of on-job development seems to be needed, given the importance of on-job learning and the lack of clarity in much of what has been written about it. To this end I have distinguished three ways of on-job helping and called them instructing, coaching and mentoring.

I have presented some initial findings from one organisation as to how managers see themselves in their helping and contrasted this with how the people they are helping see them. I have illustrated some questions that highlighting these perceptions can raise.

I have finally considered what kinds of help are beneficial to learners at various stages of development, how managers' repertoires of ways of helping expand with their own development, and the kinds of organisational culture that encourage each approach to helping.

I have left to another article a detailed consideration of the skills required for each way of helping and an outline of how these skills might be developed.

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ADDRESS FOR REPRINTS
David Megginson, Department of Management Studies, Sheffield City Polytechnic, Totley Hall Lane, Sheffield S17 4AB

APPENDIX

HELPING QUESTIONNAIRE: SUBORDINATES VERSION

Every boss has their own way of helping the people who work for them. This form is designed to give an idea of the kinds of help you get from your boss and the kinds you don't.

For each question please circle the number that best represents how your boss deals with you. Others may see your boss differently. The main aim of this form is to highlight which activities bosses use more or less than others. We're not trying to prove whether your boss is good or bad.

Thank you

David Megginson
Department of Management Studies
Sheffield City Polytechnic
Totley Hall Lane
Sheffield S17 4AB

My name: ....   My job: ....

Boss's name: ....   Boss's job: ....

1. Before telling me about a job s/he wants me to do, my boss works out stage by stage what's involved in it:

   Often   1   2   3   4   5   6   7 never

2. My boss actively seeks out opportunities for me to develop, through doing new things at work:

   Often   1   2   3   4   5   6   7 never

3. My boss listens to my ideas, and helps me fit them into my broad plans for work and life:

   Often   1   2   3   4   5   6   7 never

4. When my boss has something s/he wants me to do s/he give me very clear instructions:

   Often   1   2   3   4   5   6   7 never

5. My boss helps me to plan how I can meet challenges at work:

   Often   1   2   3   4   5   6   7 never

6. My boss asks me questions which help me to think through why I want to do things:

   Often   1   2   3   4   5   6   7 never

7. My boss checks that I have got any instructions accurately, before s/he lets me get on with the job:

   Often   1   2   3   4   5   6   7 never

8. My boss encourages me to try out new skills even if there's a risk I may not do

the job well:

Often 1 2 3 4 5 6 7 never

9. My boss is interested in what I do outside work, and how this fits or conflicts with work activities:

Often 1 2 3 4 5 6 7 never

10. My boss checks up on things s/he's asked me to do, and lets me know how I did:

Often 1 2 3 4 5 6 7 never

11. My boss encourages me to review how I perform, and to plan how to improve:

Often 1 2 3 4 5 6 7 never

12. My boss sits down with me and helps me to think about where I am going in my career:

Often 1 2 3 4 5 6 7 never