

## **Do you give advice to your clients?** July, 2015

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Your coaching client is exploring options regarding a dilemma. She asks point blank, "So, what do *you* think I should do?" This column examines possible replies from different perspectives: neuroscience, coaching ethics, dual roles and liability. Whereas the authors are involved in the Ethics Community of Practice for ICF, the perspectives reflect their opinions and not necessarily the official ICF position on the topic.

### **Engaging the Whole Brain**

As coaches, we believe that clients have their own answers and the role of the coach is to create a space for the client's wisdom to emerge. Giving advice detracts from the client's autonomy. When a coach gives advice, the client owns less of the solution. Without this ownership there is less accountability. As 2009 research<sup>1</sup> on the relationship between financial advice and decision-making by Jan B. Engelmann, C. Monica Capra, Charles Noussair and Gregory S. Berns illustrates, the brain "offloads" while it is taking in advice. The brain goes into neutral and the actual advice does not embed in the neocortex while the advice is being given. As a consequence, ownership might happen later or not happen at all. As coaches we want our clients' brains to be fully engaged! By giving advice, we appeal mostly to the rational parts of the brain. However, to fully engage the client, the emotive and sensory parts of the brain should also be involved in the decision-making process. Without a fully engaged brain, the likelihood that the client will make an unethical decision increases dramatically.

### **Making Your Comments "General"**

As a professional you might function as a coach, an individual person or an expert. When you have expertise in a particular area, and are asked for your opinion, you can make general comments without giving specific advice to the client. For example, Dalia Nakar, PCC, a Retirement Coach, tells her clients, "This is how I have seen this done before," "I have heard it happen that people can ... and the result was positive," or, "I am aware that sometimes people do it (this way) and others (that way)." Continue to make it a learning experience in which the client can gain awareness and take ownership. For example, you might ask, "What does this reveal to you that you were not aware of before?" or, "How is this information (or perspective) useful to you?"

### **Navigating Dual Roles**

As professional coaches, we should ask ourselves whether giving a client advice comes from a motivation to serve the best interests of the client or to satisfy our own ego. Everyone likes to feel respected for having given a worthwhile opinion, and nothing in the ICF Code of Ethics specifically says you may not give advice to clients. However, the ICF Code of Ethics does ask you to check for relationship conflicts that result from dual roles. It is inappropriate, confusing and may even be unethical to switch roles during a coaching conversation. People in dual roles need to pay more attention to the partnership to ensure clear boundaries.

#### *Example: Frank*

Frank works as an internal coach practitioner and human resources manager. He has just been informed that his company is planning to lay off some people in a few months and some of the layoffs include his clients. Does Frank wear his coach's hat or his HR

hat? Does he have to withdraw as the coach? What is his company's protocol for this conflict? Even though you, as the coach, are clear about your two roles, it may be confusing to the client. The role you are playing should always be clear to the client.

If your client asks for your recommendations, remember to thank him or her for being interested in your opinion. Explain that as a coach you do not give advice. Help the client explore resources by partnering in a brainstorming conversation to generate a list of possible ways to proceed and kinds of people who can offer what is needed. This list might also include you, either as a layperson or as an expert. If you agree to give your opinion as a layperson or expert, have this conversation in a different location and at a different time from that of the coaching meeting. Be very clear that you are responding as an individual person, not in your role as a professional coach.

*Example: Sophia*

Sophia, a public administrator, told her coach that she had a very important meeting that would decide the fate of her program. She knew her coach had been a manager and taught a course in strategic meeting management, so she asked for a few strategic tips. Sophia's coach proposed these three steps:

- 1) First, she would coach her regarding this situation.
- 2) A week later, in a separate meeting, she would serve as a consultant and provide tips. This consulting meeting would be governed by a new contract, separate from the coaching agreement.
- 3) She would ask Sophia to evaluate the difference between the two meetings in terms of value and effectiveness in the short and long term.

Sophia agreed to take these steps, and she reported that the most useful time was when she was coached. She said, "I learned how to think for myself about issues that were important to me. I learned the importance of including others in my dilemmas. In the long term, coaching was definitely more helpful than consulting."

*Example: Marcella*

Marcella, a financial planner and credentialed coach, was coaching Anne, who had been focusing on assuming responsibility for her financial management. The conversation turned to the feasibility of socially responsible investing. Anne asked Marcella which company was a solid one for socially responsible investments. A few weeks later, Marcella and Anne met with the purpose of exchanging financial investment information. After Marcella shared her suggestions, Anne followed her investment advice and lost money. Will Anne remember that Marcella, the coach, gave her the information, or Marcella, the financial planner?

It may not be part of our job to give advice, yet it is part of the misconception and the myth that a coach is also a consultant. If you give advice or your opinion, be sure to explore how it fits with your client's values, assumptions and perspectives. Don't just state your advice. Reflect on whether your motive for giving advice is your need to give it or the client's need to hear it. Ensure that if the client chooses to act, the gut and heart have been included in the considerations, not just the head.

## Liability

Even though you might do your best to be clear when you are not responding as a coach, the client's memories and perceptions can still become distorted. Be aware that when you respond as a professional, you assume liability. Even if a client perceives that you gave advice—regardless of whether you did or not—he might hold you liable for any action he takes. Your job is to help the client increase awareness and responsibility.

So the next time your client says, “What do you think I should do?” pause and reflect before you reply.

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<sup>1</sup>Engelmann J. B., Capra, C. M., Noussair, C., & Berns, G. S. (2009). Expert financial advice neurobiologically “offloads” financial decision-making under risk. *PLoS ONE* 4(3): e4957. doi:10.1371/journal.pone.0004957

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