

Using Emotional Intelligence to Develop Executive Leadership and Team and Organizational Development

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This case study explores how emotional intelligence (EI) was used to facilitate team and organizational cohesiveness. An organizational development (OD) consultant and an executive coach, both senior consultants, facilitated this engagement. An EI assessment and a team-building retreat served as the foundation for the process. In addition, the relationship between the executive coach and the OD consultant is examined, and comments from the CEO in this engagement and consultants are included.

Keywords: executive coaching, organization development, team development, leadership

For several decades, consultants have provided consultative services to their client organizations. Coaching and organizational development (OD) are some of these services. Generally, coaching has been viewed as a one-to-one relationship focused on a client's development and OD consulting as a relationship with a system focused on the development of that system. As may be expected, many of the necessary competencies and processes overlap.

Executive coaching (EC; Peterson, 1996) allows the executive to work individually and to address such issues as increasing interpersonal communication skills, improving decision making, skill and task delegation, improving self and or public image, eliminating minor personality defects, and accentuating personality strengths. Coaching also provides for improved self-awareness, improved self-confidence, and the ability to manage the tension brought about by disparate respon-

sibilities within an organization. This enables the executive to perform more effectively as a result of knowing his or her strengths and values and how to best perform (Drucker, 2005).

Coaches may play many roles within an organization to help achieve growth for the future. They assist in areas such as high-performance teams and personal and professional renewal, and they may provide informal leadership (Hudson, 1999). A coach helps to develop strong leaders, committed work teams, and dynamic work systems (Hudson, 1999). Coaches can emphasize both personal empowerment and social consensus, fostering an essential mindset for personal career and organizational leadership. To accomplish this, many coaches are currently applying emotional intelligence (EI) in their work with individuals and organizations.

For years, many OD practitioners have provided interventions focused on organizational diagnosis, process consultation, sociotechnical and structural changes, team building, coaching, and other training tech-

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nologies (Kilburg, 2000). The OD field has had a significant influence on organizations for decades, and much has been written about teams and leadership.

The study of leadership has been as extensive as the study of teams (Katzenbach, 1998). Leadership generally consists of such dimensions as having a vision, power utilization, delegation, discipline, supervision, and external monitoring (Kilburg, 2000). The term *team* implies a strong cohesive, complementary group of people who pull together in support of the leader's vision and aspirations. Virtually every thought leader seeks his or her own "team at the top" (Katzenbach, 1998). However, team members seldom perform as a real team because of the pressures of other priorities, as well as the strong need to preserve individuality. Therefore, most teams certainly are not real teams because the individual leader makes the decisions. It is difficult to achieve a high-performing team without changing the style of the leader, which often does not occur (Kanter, Stein, & Jick, 1992). To achieve a high-performing team, there needs to be a strong personal commitment to the growth of all members, a deeper sense of purpose, more ambitious performance goals, and accountability.

One way to help develop individual and team performance and OD is through competencies related to EI (Goleman, 1995), which is the ability to recognize and understand emotions and the skill to use this awareness to manage self and the relationships with others. According to Goleman, EI is made up of four unique skills that cover how one recognizes and understands emotions, manages his or her behavior, and manages relationships. These skills are self-awareness, self-management, social awareness, and relationship management. These four skills are important because together they capture everything an individual does that is not a function of how smart he or she is (Bradberry & Greaves, 2003).

Case Study

The following case study uses the EI competencies with a CEO and other senior leaders to develop individual and team dynamics and to help foster a better organizational climate. This consulting engagement was undertaken by an experienced executive coach and an OD professional well versed in systems theory. The case study outlines the process of the engagement and how two consultants collaborated together to offer their individual expertise and the effect the collaboration had on the outcome of the engagement.

Background

A request for group development is usually made when any small group that works together for a common purpose believes that there is a benefit to looking at its process to understand what dynamics are contributing to the positive and negative effect of the group on both internal and external clients, as well as product and service delivery.

Our client was the CEO of a 25-year-old international company. The company provided professional consulting services. These services included training, educational materials, and software to support their training. The company, for over 25 years, built and maintained strong relationships. Their primary goal was to help their clients in all aspects of product development and sales processes. There were approximately 150 employees who included software developers, consultants, sales personnel, and staff.

There was an initial meeting with the CEO in which he was not confident that the consulting was even necessary, although he thought there was a lack of creativity and innovation. Kuczmariski (1996) noted that most CEOs and senior managers are intimidated by innovation. Even so, this initial meeting did lead to a second meeting with the CEO and the senior leaders. After that

meeting, the consultants were hired. They would assess each team member and provide a group profile, in addition to a 12-hr offsite team building retreat. The consultants were called upon to design and facilitate a process to address the leadership that operated with a silo mentality. The presenting issue was that operating in silos prevented the creative thinking and future visioning needed for the ongoing success of the company. At the time of the initial intervention, the organization was caught up in year-to-date tactical thinking. This reality was a major source of tension among the leaders of the organization. The stress level among the leaders was high, and there was a persistent theme of distrust, lack of leadership, and lack of direction. Beneath this tension were deeply embedded feelings that could not be expressed and therefore contributed to a bunker mentality. Loose affiliations or coalitions also formed around the need for resources from time to time. The CEO concluded that there was little creative innovation and thought there needed to be a change.

A Two-Prong Approach

The consulting engagement utilized two senior consultants who designed a two-prong approach. The OD process was intended to have an effect on a group level, and the EC was intended to have an effect on an individual level. This approach was designed to create higher productivity and efficiency in a short period of time.

The roles of the consultants were defined in the early stages of the project development. Simply stated, while one consultant was facilitating, the other would take on the role of process observer and could interrupt the process to make observations to assist the ability of this group to understand the dynamics that were contributing or inhibiting group progress.

The OD consultant sat in throughout the specific feedback sessions that were conducted by the executive coach and ob-

served what transpired during the individual feedback sessions. The OD consultant used the observations in designing the process that would take place during the 12-hr offsite team-building retreat.

Having the executive coach initially provide individual feedback and review profiles allowed the coach to assess individual strengths and limitations. Given a baseline in terms of individual reports and feedback regarding group process, the coach was then better able to observe individual behavior within the group setting.

Both consultants had agreed that, whatever they did, they would not engage in a merely didactic process in working with this group of very intelligent, capable people. They wanted to model behavior (collaborative) throughout the process and to facilitate the eliciting of participant knowledge, wisdom, and insights. They had to get past both personal and group roadblocks.

Design of Project

Our goals in this project are given in the following list.

1. To use an EI inventory to establish a baseline of each individual's behavior and how that behavior was affecting the team as a whole
2. To provide individual feedback
3. To conduct an initial 12-hr offsite retreat to:
 - review history,
 - elicit expectations,
 - provide an EI composite of behavior, and
 - review operational guidelines
4. To have a follow-up, 12-hr offsite retreat

History Review

To begin the process, the OD consultant initially reviewed, with the team, the his-

tory of the organization and the history of the team and facilitated a discussion about why we were involved in this particular meeting. As Drucker (2005) has pointed out, the first secret of effectiveness is to understand the people with whom you work. Key to the history review was establishing the importance of expectations.

Expectations and Overview

The first facilitation that transpired was to examine the group outcome expectations once again. Participants had an opportunity to express and clarify their expectations. This discussion also provided the consultants the opportunity of listening to the information that was shared and observing individual behavior within the group.

One participant began by articulating that he held very little hope for meeting any expectations, given this particular kind of process. He stated the belief that this would probably be a waste of time. From his perspective, this was a soft process versus what he would view as specific tactical left-brain activity that needs to occur to have a successful business.

As with many CEO-initiated consulting engagements, it was possible that the participants would follow in tow and what would be observed would be compliant behavior. Participants wondered whether this was just another "flavor of the month" or something much more substantial in nature. The CEO was strong and very clear about what he wanted to achieve in terms of team development. He constantly worked to develop a sense of trust and a connection with each member of the team while observing their behavior.

The initial reaction of the team was extremely valuable to both consultants from the perspective of seeing and perceiving the initial resistance. The initial EI feedback sessions also provided the consultants with the realization that the resistance was dynamic and deeply embedded within each member. Resistance would clearly be man-

ifested in individual and group behavioral repertoires, and the particular style of the individuals and how they were beginning to communicate also gave the consultants a window to understand their "silo style" and what was contributing to maintaining it.

In eliciting expectations, the consultants began to see particular styles and roles as to how members communicated both verbally and nonverbally, and this activity provided opportunities for process observations and information used in the management of behavior in future encounters.

By asking rather than telling, the consultants encouraged the participants both to articulate their beliefs regarding the behaviors that others portrayed and to confront behaviors that had been somewhat disruptive in the organization's success. This behavior emerged very early in the process and opened the door for the two consultants to provide the initial group EI feedback.

EI: Group Composite Discussions and Observations

During the initial group composite feedback, the room grew quiet and there was a great deal of interest exhibited by the participants. Not surprisingly, the team reacted to the reality that the instrument pretty much was projecting what they all were feeling and already believing about how the team was performing. Underlying this process was a belief among the participants that they lacked effective and strategic direction. In fact, the team somewhat acted as though it were leaderless.

The EI group profile allowed them to view themselves as a group and have a sense of their collective effect on the organization as a whole. This provided a potential shift from blaming individuals to one of seeing collective responsibility for organizational outcomes. Their collective insights helped them to address their feeling about the lack of trust that was felt by all the participants.

Trust

The lack of trust was very strong and rooted in history. Through the individual behavior of the participants, the consultants could see internal frames of reference, their attitudes and beliefs, and how they perceived each other. They seemed to be rather fixed in their assumptions and beliefs and were seemingly unbending in terms of any possibility for real change or positive movement.

The consultants provided some interpretations or observations, which then began to allow each of the members to become a little bit more vulnerable and more open to what was occurring. The very different orientation and extensive experience of the consultants allowed for real synergy and modeling for the team. The OD consultant was obviously tuned in to the group process and group interactions on many different levels. The executive coach focused on individual statements and behaviors. This synergy allowed for multilevel interpretations. The benefit of two very diverse orientations expressed in a collaborative fashion allowed the consultants to manage their interventions and delicately ask and encourage the participants to further explore what was going on, not just on a surface level or an intellectual level but on an emotional process level.

Trust and Vulnerability Through Modeling

The relationship between the two consultants, the trust, and the vulnerability, added to a feeling level or tone within the process that contributed to the participants being able to become more open and vulnerable. Not only were they able to respond on a superficial intellectual level, but they also began gingerly to respond from an emotional standpoint, appreciating how emotions and feelings contribute to either function or dysfunction within the group. After a few hours, the consultants began to see some of the shift. In part, the consult-

ants believed it was due to the relationship between them, their consistency, and the inability of the team members to split the two consultants. The consultants were not offended by each other's behavior and moved forward demonstrating helpful conflict resolution and the mediation of situations. The participants engaged in "picking up" on how the two consultants were working together.

EI: The Group Profile

The use of graphs and charts made the presentation of the EI group profile easier for the participants to understand. The real challenge for the consultants was to connect the feedback with individual and group development opportunities. To help with this, the consultants assigned the reading of *Primal Leadership* (Goleman, Boyatzis, & McKee, 2002) before conducting the 12-hr event. Each participant read the book, some reading more in depth, and some actually underlining some items. Their work with *Primal Leadership* created an opportunity for an in-depth group dialogue in which they could connect the EI feedback with the information provided by the text.

The EI competencies represented one way to go from a highly intellectually oriented focus to one that would be more self-aware and more functional. In addition to that, the use of *Primal Leadership* explained each of the competencies, and in providing some case studies, offered a useful orientation for each of the members. It gave them something very concrete, something very intellectual to use so that we could begin the journey, as well as a process for getting participants out of their intellectualizations and into more emotional responses. *Primal Leadership* allowed for an intellectual discussion in which questions were raised and thoughts were provided, both pro and con; once again, this served as the necessary step that both consultants felt needed to occur for the participants to be able to integrate the information on both the individual and group level.

Transition From EI to Leadership and Group Development

Given a better understanding of both individual and group EI, participants were now ready to look at shifting their leadership to a new paradigm. The team's expectations were very clear: We would shift from the EI profile to looking at leadership as a paradigm and the responsibilities of the team working together from an operational perspective. The basic image used was that of a freighter canoe once used by the old voyagers. The image provided a sense of individual roles within the freighter canoe, and the canoe represented the whole entity—their organization. The process stimulated an opportunity for the participants to discuss their roles within the canoe and also an understanding that it's never a gentle passage. They saw that they needed to work together to succeed. Also, it was suggested that, to succeed, the group should consider having a vision, a mission, and a clear set of values as to how it would function as a group outside of their normal activities within the organization.

This discussion of mission, vision, and values offered another entree into the process. Whereas before—without the discussion of working together—the participants may have seen the exercise of identifying the group's mission, vision, and values as an intellectual exercise and something that many companies go through, they now had gone through it and had a vision and mission statement. Considerable time was taken to lay the groundwork for this to occur so that we could get a more accurate picture and depiction of their values, which then could be projected into creating a different kind of mission and vision in which each had some emotional ownership. This created a greater sense of group ownership, which allowed them to feel some passion around the investment in and willingness to carry forward the vision and mission.

The discussion that followed began to center around what they actually needed from each other, how they were communicating, and how much of their information/feedback was transmitted through third parties. This provided the OD consultant an opportunity to ask whether they wanted to contribute to each other's growth and development and whether they were open to receiving feedback.

As we proceeded, we attempted to confront and challenge their remarks and comments and provide input regarding mission, vision, and values. It became clear to the consultants that the individuals were manifesting a behavioral style in which they were used to being rather careful and cautious regarding their remarks. The OD consultant provided a basic communication model to help move beyond this point. That communication model consisted of three basic points. One is connection. First, an individual needs to make a connection with somebody. Second, the individual needs to clarify what it is he/she is discussing and make sure that there is clarity for all parties. The third component is commitment: making sure there is a commitment and agreement as to exactly what all parties are clear about, what they agreed to, and with what they will move forward. The team was able to engage in being more open and honest and started the process of, "I'm really going to put some investment into this from a personal standpoint, not just an intellectual exercise sitting here and getting through the day and fulfilling the wishes of the CEO." As Blanchard and O'Connor (1997) have stated, in a company that truly manages by its values, there is only one boss—the company's values. Here, the consultants clearly emphasized the importance of values.

How Are Matters Decided?

The question of how matters are decided set off a firestorm, because the issue of decision making was a central concern for this team. The most important step in unclog-

ging decision-making bottlenecks is assigning clear roles and responsibilities. Good decision makers recognize which decisions really matter to performance (Rogers & Blenko, 2006). It wasn't clear how decisions were made in this team, but it was clear that individuals did not necessarily feel ownership in the decision. It was also stated that matters discussed for decision either fell through or were different from what was decided when implemented.

As we continued to probe decision making, the group began to openly discuss matters that fell into the aforementioned categories and discussed potential remedies. They also discussed how their decision-making process led more often than not into forming coalitions for and against individuals as well as groups of individuals. This tension frequently seeped into the reporting layer of managers and employees that reported to the participants.

Getting in Touch With Feeling and Listening . . . Can Be Fun!

The OD consultant at this point had the group focus on the feelings around decision making, and this caught them somewhat by surprise because they were in their natural state (logic) now and were talking about decisions, but they were in no way in touch with those feelings. It also became very apparent to the executive coach that the team was not listening. Not only were they not getting in touch with what they were feeling, but they were in such a thinking modality that when someone would stop talking, they would pick up from their own point of view and have no connectivity between what the previous person had said and its implications for going forward. The executive coach started asking individuals what they were feeling and then pointed out that they were not stating a feeling: "You're stating more thought." This created temporary moments of tension but also moments of levity, as it became apparent to the participants that the executive coach

had truly hit upon a truth that no one in the room could deny.

Going After the Cheese

Fortunately for the consultants in the process, the executive coach was able to intervene with the CEO, who spoke mainly from an intellectual and thinking perspective. When consistently challenged by the executive coach to identify a feeling, the enormous difficulty of this particular task became obvious not only to the CEO but also to the team. As the challenge continued, it became somewhat easier for the CEO to identify a feeling. This, then, allowed for the team members to see the connection between the thinking and feeling.

The question around decision making, as open-ended as it was, also opened the door for participants to identify areas of conflict. The participants agreed that most of the conflict that arose within the group was moved into subgroup conversations and discussions, and that they did not have a process for managing the conflict, which contributed to much of the distrust that individuals were feeling.

The whole idea of managing a conflict versus resolving a conflict was discussed. The participants discussed what they believed needed to be done. The question of what individuals in the group actually felt about conflict and how each of the individuals dealt with it was examined. By and large, most team members were basically uncomfortable with conflict and had physiological and emotional reactions to avoid conflict. They also discussed what conflict within this group meant to them, and this led to some understanding of why the team wasn't dealing with it.

Transition From Thinking to Feeling ... A Natural Stimulus-Response Reaction

This was a critical point in the development of the whole retreat process. The OD

consultant developed enough trust with each of the participants to make strategic and pointed interventions without an extreme amount of resistance or vulnerability. The CEO's struggle with having to identify feelings may have provided the vehicle for each of them to appreciate the other's struggles and allowed some collaboration and connection that they may have not felt previously. Again, at this point, the communication energy was strong and engaging.

Unclogging the Channels of Communication Through Commitment

As the level of communication was increasing through listening and feeling, the consultants raised the question, "How do you communicate?" It quickly became evident that the participant's communication patterns were ineffective and frequently led to a low level of commitment. The consultants took this opportunity to introduce a communication cycle that could potentially increase their level of commitment. At least it gave them a frame of reference that they didn't have before the retreat. An interesting sidebar was that they actually took that model (connect, clarify, commit) and had it duplicated and placed prominently in some of their offices.

Breakdown in Project Management and Its Effect on Task Harmony Between Groups

Neither consultant was surprised that, when we talked about task completion and getting the job done, that was not an issue across the group overall. No one questioned whether people could actually complete the task. What was missing was task harmony between work and efficient, effective project management.

The issue of task completion between groups led to questioning of the competencies and skills of individuals in the group.

Task completion issues contributed feelings of distrust among the participants.

As we progressed in the retreat process, the consultants attempted to collate the various segments of the retreat. Having a greater awareness about their individual and team dynamics allowed them to be more self-aware. Discussing decision making and communication styles further developed their trust and ability to be more open. This led them to realize the need to work more collaboratively to produce the desired business objectives and strategies. Therefore, task completion could be more productive, less negative, and more collaborative. This transition from the beginning to the end of the retreat, both intellectually and emotionally, created a shift in their thinking and helped create new behaviors within the team. At the end of the retreat, it was agreed upon to have a follow-up retreat in 90 days to assess their progress.

Follow-up Retreat

The 90-day follow-up retreat process was similar in design to the first 12-hr retreat. We reviewed the emotional competencies discussed and where they thought they had improved as a team. We reviewed operational guidelines and the effect those guidelines had over the 90 days. We also included a discussion about teams and how they function at the senior level.

One noticeable difference was how the CEO spoke to his own development with the coaching. He restated the importance of the coaching and team development process. The discussion among the team was more open, demonstrating some improvement in trust. They, as a team, were more relaxed. For the most part, they started to relate and cooperate more with each other. The silo mentality was beginning to shift in a more positive direction. Their discussions about strategy and growing the business definitely had more positive energy and focus.

They started to become more cross-functional and displayed more willingness to listen to each other. The negative assumptions were fewer. Their decision making as a team showed improvement. Although they were more aligned than they had ever been, it was clear to them that they wanted ongoing individual and group development opportunities for themselves and their direct reports.

At this point in the process, the consultants continued with the senior leaders and began to focus their consultations with the middle management core. What began to shift was the working relationship at both senior and middle management levels. It was observed that more collaboration and cooperation was developing, and the silo mentality in the organization was considerably less.

After several months of working at both levels in the organization, the consultants began to decrease their consultations and let each level continue on their own. That was also agreed upon with the CEO, who now had much more engagement in the overall organizational development process. It appeared to be a good time for the consultants to start disengaging. In the end, all of the coaching and team building did produce a significant shift in the organization. The CEO developed more productive and positive leadership skills, and the organization was more focused on strategy and working collectively toward achieving the goals that had been established. The consultants departed with a lot of positive feedback from the organization, and the CEO was genuinely grateful for our assistance.

At the beginning of our professional relationship, we made a mutual commitment to not only write this article but also continually give each other feedback regarding our collective and individual performance. We had created a learning environment that was mutually beneficial. Our sharing of skills and experiences was invaluable for

each of us. We were also determined to have our client provide us with his perspective of the consulting experience. We therefore developed the following questions that we believed would be most beneficial in our postengagement interview with the client CEO.

Client Perspective: A Postengagement Interview

What Is Your Definition of EC and OD?

From an OD standpoint, I see it as process driven. It is not training or lecturing on how to be creative. It establishes a process that the participants can use to get at a meaningful outcome. EC comes into play during the course of the OD process, in which you uncover a host of problems that cannot be fixed through process or forums. It becomes evident that there are people issues that have to be managed, as well as an awareness that you have a need for a better understanding of how to overcome your own limitations and build on your strengths. The EC plays a key role in the journey of self-affirmation and improvement.

What May Prompt an Executive to Engage in an EC/OD Relationship?

The biggest prompt would be when you become aware that your organization is at a place where it needs to get to a higher level. For example, I became aware that we had smart people and at the same time were becoming less creative and solution driven. Another prompt is recognizing that the organization is dysfunctional in some way. I knew that one of our problems was not working well together. The challenge is always the same: to either let it go or fix it. I chose to address it. I had to trust the process and be open the coaches' observations and input.

What Are Two or Three Essential Ingredients That Underlie an Effective EC/OD Engagement?

One, you need a leader who buys into the process and believes in it. Two, the leader also has to be patient and believe that we will eventually get there. Three, you have to be aware of what you want to accomplish. Four, you have to be willing to learn and look at yourself through a different lens. Five, do not give up just because you experience resistance or lack of buy-in, because you are often having a positive effect on more people than you think. Six, be willing to accept feedback.

For You, What Has Been the Most Useful (Valuable) From the EC/OD Engagement?

Stepping back and recognizing how I interacted with people. Looking in a mirror and seeing characteristics you do not want to see. Realizing that it is not what you want to be about. For example, I did not want to be the person reflected in the EI assessments. I was challenged to get my inner working in line with others' perceptions of me. I will be forever grateful for the learning.

What Are Two or Three Pitfalls That Executives Should Keep in Mind When Considering Whether to Participate in an EC/OD Engagement?

You have to be willing to see the process through while facing the challenge of not really knowing who is buying into the process. You have to realize that there are peaks and valleys that you go through that can contribute to self-doubt because of the criticism and skepticism of others which leads to the temptation to return to the status quo.

How Important (or Useful) Is It for All Members of an Executive Team to Be Simultaneously Engaged in EC?

It is really important, especially if you can pull it off; in fact, it can be phenomenal. Keep in mind that, if you are not able to pull it off, that does not diminish the phenomenal benefits. We did not get 100%, but we did get enough buy-in to make the overall experience worthwhile.

Consultants' Perspective: Postengagement Comments

The consultants concluded at the end of the engagement that their experience of working together was a value-added benefit. Neither consultant prior to this engagement had had the opportunity to work in a combined EC/OD professional collaboration.

We mutually agree that the process of forming a working relationship while providing a seamless engagement in the presence of the client was challenging. We knew that the formation of our own group process was not dissimilar to what our clients experience.

We knew from the start that our styles differed, and we were determined not to let our styles become a source of conflict for the client. We decided, through our own mutual supervision, to provide each other feedback and, when appropriate, provide our client with insight into our own development and use that information as teachable moments.

The development of our working relationship allowed us to stay focused on our individual areas of expertise. For example, the executive coach could focus on the individual behaviors of the participants and the potential effect of those behaviors on group harmony and on both group and individual performance. Similarly, the OD consultant could focus on organizational and group dynamics and the effect of those dynamics on the health of the organization.

We believe that our comfort in working together and agreeing to provide each other with feedback helped us to model a working relationship built on a foundation of trust and respect. Although knowledge and experience are key ingredients in an engagement of this kind, in the end the most important ingredient was our mutual trust and respect.

We certainly would do it again!

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