

Fearless Thinkers, Season 2 Episode 2
What we've learned (so far) by using AI in coaching
with Fredrik Schuller

Masami Cookson: Welcome to Fearless Thinkers, the BTS podcast. My name is Masami Cookson and our host is Rick Cheatham, head of marketing at BTS.

On today's show, Rick has a conversation with Fredrik Schuller, who is head of BTS's coaching area of expertise. After 15 years in the San Francisco Bay Area, Fredrik returned home to Norway three years ago to better serve clients across Northern Europe. Fredrik's experience working with leaders at some of Silicon Valley's fastest-growing tech companies and the world's largest energy organizations has kept him on the cutting edge of building client results through people development.

Hey, Rick.

Rick Cheatham: Hey Masami! What's been, gosh, coming across everyone's feeds wherever they look right now is what's going on with AI and what's going on with the different free tools out there that can just radically change what work looks like. I was looking at this crazy one where this guy loaded every Adele song and told it to write, and the thing was amazing. It's just kind of mind-blowing what technology's doing now.

Masami: I'm a huge Adele fan, so if it results in more music from her, I'm here for it.

Rick: Well, the terrible thing is it's maybe not more music from her, it's music from some random computer that's been programmed to sound like her, but still, it's good.

Masami: Woof.

Rick: With Fredrik today, we get deep into the power of coaching. AI can bridge the gap between those coaching sessions. It's a great chat.

Masami: Cool. Let's get into it.

Rick: Hey, Fredrik, welcome to the show.

Fredrik: Hey, thanks.

Rick: How you been, man?

Fredrik: Yeah, life is good. It's been a wonderful winter in Norway, so we have got lots of skiing and fun stuff going on here.

Rick: Oh, I'm jealous.

Fredrik:

I made myself an initiative. I'm mid-40s now, and I got kids that are five and seven, and I decided I want to be the dad that learns really difficult stuff when he's getting older to be a good role model for them. So, I've been trying to take up something called wing foiling to learn to surf the wind on a hydrofoil, and it is so difficult and it's so rewarding. I just wear thick wetsuits and do it. So that's what's been in my blood boiling lately.

Rick:

It sounds very intense. It sounds well above my capabilities. Like you, I do enjoy so much continuing to push myself mentally, physically. I think I've got almost 10 years on you but at the same time, I always kind of live in fear of stopping the new things and what life becomes like when it's just a series of pattern days.

Fredrik:

So actually, Rick, this is something I learned through my own coaching experience: to find these new outlets. When I first got introduced to coaching was when I got promoted to my biggest role in my career and had a kid at the same time. It was in San Francisco and Jessica, who's now our CEO, she told me I would have responsibility for the West Coast, and I was just having Oscar at the same time. And that was really difficult. It went downhill for about a year until I asked for help. And when I did ask for help, I got a coach and it was truly transformative for my life and how my relations with others, how I thought about the world, how I was able to find a balance in life, but also have really high impact and performance on the job. So that's what led me into coaching in the first place. And also what sparked a lot of the ideas for what we'll talk about more today.

Rick:

I remember that moment for you, my friend—transitioning from zero kids to one. As a father of four, I still would argue that that's the toughest transition. And, actually, I didn't know until we were preparing for this that it was actually your coach that really helped you pivot from being stressed out and constantly running from thing to thing to being able to be a better leader. And it sounds like a better father. So that's awesome.

Fredrik:

Yeah, the thing about coaching that's so unique to me is it's not just helping me. It has this Multiplier effect. So, my days were better, I had better interactions with people, five to 10 to 15 people around me every day had a better life experience because of it.

Rick: Wow, that's an awesome way to think about it. We don't often think about the broader net that is cast when somebody is performing better and managing their stress better and able to prioritize their day better. If you wouldn't mind giving us a little bit more perspective on what great coaching looks like.

Fredrik: That's a big question, Rick because we can spend the next hour on this topic itself. But if you think about kind of the history of coaching, it used to be available to only executives at really high prices, 20 to \$30,000. And it would be only the people at the top of the house also very much based on the processes that that coach felt comfortable with. Our point of view is that how can we make this incredible way of learning, an incredible way of developing available to the thousands and the many and not just a few? So, we worked on finding ways to make it vastly more affordable and vastly more scalable. We did research on 150,000 coaching conversations to figure out what is it that's coming up, what are the most common issues that are coming up during coaching journeys?

And what we found was that there were a series of mindsets that came up over and over and over again. And one of the problem areas that we also had initially when we were scaling was that a coach in Asia might have done a different approach than a coach in Europe. So, when we were trying to create consistent quality around the globe, we started creating our own coaching methodologies. If we can change someone's mindset and reveal underlying mindsets around different approaches, we can shift behavior much faster.

Rick: You said something quickly: "Hey, these are the mindsets." To me, that's a very important word that often means different things to different people. Are you talking about just limiting beliefs potentially? Are you talking about just perspective on ways of working, both, something altogether different?

Fredrik: Oh, man. You're asking me to define mindset?

Rick: That's what just happened.

Fredrik: That's what just happened. Well, in the simplest sense, our mindsets are the beliefs that we hold around the world that forms the way that we behave. So those can be around work, those can come from our childhood, those can come from recent interactions... Or it can come from experience from all walks of life. And the way that we view the world and the way

that our mindsets drives behavior, sometimes that's productive and sometimes that's limiting.

Rick: Cool, yeah, I've spent most of my career coaching salespeople when it comes to how, and when I've coached, and I've always said, salespeople have to be true believers or they're evil. Meaning that if I can convince you to separate yourself from your money for something that you don't necessarily believe in, that's evil.

But the best sellers are the ones that tend to believe that what they're out there doing is what's best for themselves, their company and of course, their customer. And so I've definitely seen the power of mindsets either really accelerating business outcomes or really holding them back.

Fredrik: You also have other examples of that. Many leaders that take on a leadership role for the first time may have a mindset that they need to have all the answers, and they need to figure it all out instead of having a mindset that that's what the team is for and we're gonna figure this out together.

Rick: Oh, it makes all the sense in the world, for sure. Well, so let's skip to the second half of what you said, which was scalability and how you and your team were beginning to use technology to scale coaching even more or make the coaching interactions for the existing populations even better.

Fredrik: Yeah, it's a really interesting question. And my journey into this started when I took over the role as heading coach within BTS and I decided to do a new coaching journey to experience what the current customer experience would be.

Throughout the six months I was doing it, I kept mapping how I was feeling about the journey, highs, lows, emotions, needs, wants at any stage. I had bad experiences, I had great experiences, I had mediocre experiences throughout the time.

But the first thing I noticed was that it was up and down and it was a very predictive pattern. Every time that I had a meeting with my coach, it was absolutely fantastic. And then it just started dipping. And very often in the coaching conversations, we were talking about a specific interaction or a collaboration I was having with someone but I felt like so alone in between. I wanted more support from my coach. And I realized that a coach that coaches many people can't know about everything that I got going and even though we might have talked about this interaction, she

couldn't be there or send me notes right before every time.

So when I shared this with the team and we started looking at like, what's going on here? We realized that kind of a man-machine relationship might become really, really helpful in this situation. So that's where we came up with kind of an augmentation of AI to help the coaching between the coaching sessions, because there's some things that are really sacred about the human-to-human relationship that you get as a coach, but there's many other practices that you can be helped by an AI in between the sessions.

So let me give you an example. Like one of the things that 80% of our coaching journeys touch upon is being at my best, being resilient and being resourceful, more resourceful in how I operate. And the big mindset shift is for people to go from, "Triggers happen, and I need to get rid of the triggers that upset me and triggers my amygdala," to being, "Well, triggers will happen every day, but I'm in control of my emotions. And we have a process to help you get out of a triggered moment and start using the prefrontal cortex and be at high-quality thinking."

Usually, people would experience that in the coaching session with a coach. That process is called ETC, it's about the emotion, the truth and the choices that you have in that situation. And it's really helpful and you have a big "Aha!" and like, "Oh my God, I had no idea that I could help myself become more resourceful in these situations."

But it's really difficult to do, and it's maybe three or four weeks till the next coaching session. We've figured out how to then give you a bot that can help you through that process every single day or every single time you're triggered so that you can self-monitor and self-help yourself over time, which is the ultimate goal of coaching. You shouldn't become addicted to your coach. The coach should help you to become more self-reliant over time.

Rick:

If I have a boss that's a great coach, being able to self-manage, I would assume, is always the very, very best outcome.

Fredrik:

I agree. And then what's interesting is we've been testing this further too is that initial intention of this AI was to be able to help you in between coaching sessions. But what we start to realize is that it might have different applications too. For

example, we do pods and workshops to also teach people how to become better at managing their state and being resilient and being at their best. And traditionally now, we've either tried to get people to get it through demonstration or for them to practice with someone else who doesn't know how to do it.

So, we've been experimenting with using the bot to give people an experience with having that process for the first time. And what we're seeing too is people are more honest and open up way more with a bot than they would do with a coworker, for example.

Rick:

Wow, I actually never, never thought of that, but I think we as humans in general can't help but try to manage our persona. So that is a surprising bit of information, but actually when I think about it, quite intuitive.

Fredrik:

When you think about learning coaching therapy, like any sort of help that you have, it's usually at a pre-scheduled time, but when you're having your issues, they happen anytime during the day. They can happen at 8 AM, they can happen at lunch, they can happen at night.

Rick:

Yeah, of course it does. Of course it does. What else is on the horizon when it comes to AI and coaching?

Fredrik:

A different way of doing, getting multi-rater, a 360 feedback? I mean, we've all experienced getting a traditional 360 model, where you get rated across 50 behaviors from the people around you. And I would call it moderately helpful but when I've debriefed them in the past with a coach, it's been frustrating because you see, "Hey, I'm lower on this one dimension" – let's say strategic thinking.

Then it starts becoming like a guessing game. What's the situations? When did this happen? You don't really know because there's very little written or deeper feedback around it other than you're scoring lower on this one single item.

So I want to kind of get around that. When I had my coaching experience I shared earlier, I got a verbal 360, which was amazing. My coach interviewed about 10 to 15 people around me. And it was incredible. I laughed, I cried, I was ashamed, I was proud, all the emotions when I saw it. And it became very clear the things I could do to have a better impact on the people around me. And that cost \$10,000.

So it's not scalable, but what we've figured out with our NLP and AI is how to actually do that with

a bot instead. So we're, again, trying to take something that was available at a really high end and making it available to the many and try to help the person providing the feedback to give more useful feedback throughout the process.

Rick:

We recently had Peter Mulford [on the podcast] talking about AI in general, but to hear very, very specifically how it can make a difference in everyday life, how it can take something that most people would say is good and important but also make it possibly more accurate based on that thing we were talking about before where people aren't as guarded when speaking to a bot as they would be speaking to another human and more available. I mean, I think the more people that get the right coaching to perform better, the better.

Fredrik:

Yeah, and there's a couple of things here that we're doing that I think also can make a big difference in longer term. The first thing is, anytime that I've received an assessment, I'm not in a good place before I'm about to open that file. My stomach is clenching. I'm nervous about what people are gonna say about me. It does not come with a lot of great emotions.

So one of the other things we're experimenting with is actually to create a cheerleading squad for you practically before you open it. So all the raters are actually encouraged to do an encouraging video to say, "Hey, Rick, love working with you and I've given you some feedback that can make us even better together, and I'll be here all the way helping you." So you get to see all these videos of encouragement of the people that have rated you prior to opening the report. So you're getting to an emotional state where you're feeling supported rather than judged because I think the whole feeling of being judged is not like a great part of assessments.

Rick:

I would probably take some of those videos and convert them to ring tones just for the hard days.

Fredrik:

And then the other thing that I think when you're looking at someone's behavior, it's rarely an isolated issue. It's usually a collision between multiple people. Yet when we do multi-rater assessments and start coaching journeys, for example, you put the assessor clearly in the judge seat. We're working now on finding a way to switch it throughout the assessment to ask the question if they're willing to reflect on their role in this behavior and go deeper and say, "Hey, might I

actually have some part in Rick behaving this way or you behaving in this way?"

And why that's interesting to do is that if you can get two people to work on an improvement together versus one that you're much more likely to make an improvement on that. And the way that we came to this insight was there was someone on my team that I was very frustrated with not stepping into the forward-looking strategic role of the product management that he was doing. And I gave the person feedback and he got quite upset with the feedback. And it was hard. We went through this a reflection process together on like how can we help change this. And at some point in time, he said, "You know, Fredrik, there's no space for me to do what you're asking me to do because when you see me not doing it, you jump in and you do it every single time and there's no space and you do it so fast. There's no vacuum for me to step into."

So how can we bring that into the way that we get feedback from those people around us and into the rating so that we can switch the rater from being a judge but also be a reflector on their own role on enabling or making it difficult to do the new behaviors that you want from others around you.

Rick: I can see how that would potentially shift completely the conversation, how we address the things that are gaps and potentially accelerate the positive outcomes.

Fredrik: Absolutely. So I'm really excited to be testing these things over the next six months. Every time we try something, we just learned so much new what's working and what's not working, and how we need to pivot and what needs to change.

Rick: Love it. Well, hey, my friend, thank you for giving us so much time today. I could talk about this stuff forever.

Fredrik: Yeah, thanks for having me.

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