

# The AI-Enhanced Coaching Triad: Co-Creating Conversations between Coach, Coachee, and AI, and Associated Opportunities, Risks, and Ethical Issues.<sup>1</sup>

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8 June 2023

BPS Coaching Psychology Division, Annual Research and Practitioners Conference,  
London, Hilda Clark Suite, Hybrid Session on Zoom

v1.2

**Abstract:** This presentation explores the integration of AI technology into the coaching process, focusing on the co-creation of conversations between the coach, coachee, and an AI coaching companion. Severin Sorensen, an experienced executive coach, shares his journey of incorporating AI tools, such as ChatGPT and Fathom Notes, into his coaching sessions. By leveraging AI, Severin aims to enhance the coaching experience, provide immediate insights, and co-create new materials for consideration. This presentation examines the opportunities, risks, and ethical issues associated with this AI-enhanced coaching approach, emphasizing the value it brings to clients (coachees) and the importance of maintaining a coaching-oriented mindset.

**Biography:** Severin Sorensen, M.Phil., serves as the CEO of ePraxis LLC, a top-tier executive coaching and talent recruitment firm. As the host of AreteCoach.io and Arete Coach Podcast, he bridges the gap between the Art and Science of Executive Coaching. He is the author of three books focusing on the intersection of AI and coaching, including the acclaimed "The AI Whisperer" series and "Next 10: Coach Wisdom for Entrepreneurs, Business Owners, and CEOs Wondering What Moves to Make Next." In 2005, he successfully exited from a company he founded, now part of Interface Security, the 7th largest US security integrator, attributing his success to Vistage's executive coaching and peer groups. As a former Vistage Chair (2010-2018), he coached many executives and facilitated peer groups, receiving both the "Rookie of the Year Chair Award" and "Mentor Chair" honors. Today, Sorensen has provided over 8,000 hours of paid professional executive coaching sessions. He has also invested in learning from 800+ hours of personal coach development training, with certifications including ICF ACSTH Certified Executive Coach, Certified Organizational Development Coach, and Certified Life Coach. He earned his M.Phil. in Economics from King's College, Cambridge University.

## 1 Introduction

Sir John Whitmore, astutely stated, "Coaching is about unlocking a person's potential to maximize their own performance." Embodying this ethos, I will explore the concept of 'The AI-Enhanced Coaching Triad: Co-Creating Conversations between Coach, Coachee, and AI.' My goal is to enrich the growing field of coaching

psychology by championing the judicious and ethical use of AI technologies in the executive coaching setting. This approach aims to augment coaching outcomes and foster dialogue that provides superior value to our clients, the coachees.

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Sorensen, S., (2023) The AI-Enhanced Coaching Triad: Co-Creating Conversations between Coach, Coachee, and AI, and Associated Opportunities, Risks, and Ethical Issues. BPS Coaching Psychology Conference 2023: Integrating research and practice. London. 8 June 2023. © 2023 by Severin Sorensen. All rights reserved.

As an executive coaching practitioner, I am eager to offer insights on integrating artificial intelligence (AI) into coaching practices. My experience is intended to guide both practitioners and researchers toward creative, ethical, and safer methods of utilizing AI in coaching roles.

I am Severin Sorensen, an alumnus of Cambridge University with over three decades of career experience that spans the public and private sectors. After obtaining my graduate degree in economics, my journey led me back to the US, where I spent 20 years as a CEO of a management coaching practice and 13 years in executive coaching. I have melded entrepreneurship, academics, philosophy, and coaching, which has led to over 8,000 hours of executive coaching and group facilitation since 2010.

As an executive coach, my dedication to continued learning has taken me into deep explorations of essential career topics. I am a certified executive coach with six coaching certifications, with a focus on small and medium-sized business owners, entrepreneurs, CEOs, and key executives. In my coaching sessions, I employ the Socratic method, with clients as coachees, and since December 2022, I have included AI as a supportive element in my coaching toolbox.

The worldwide release of OpenAI's ChatGPT on November 30, 2022, presented a paradigm shift. Whatever we thought about AI and its capabilities prior to this date has been eclipsed by the sheer capability of ChatGPT and its iterative improvements since that date. Important work on coaching and AI from Clutterbuck (2023, 2022), and Grabmann and Schermuly (2020) must be revisited and assumptions reassessed as the capabilities of AI have measurably increased with GPT 4.0, and the emergence of GPT 5.0 visible on the

horizon. Prior to the ChatGPT 4.0 worldwide release, Terblanch, N., Molyn, J, de Hann, E, and Viktor O. Nilsson (2022) had already shown that AI coach bots yielded similar efficacy to human coaches in a controlled 10-month efficacy study. One can only wonder (and explore) how much more powerful AI is at helping coachees find greater value in the coaching setting today.

I first engaged with conversational AI technology in the form of ChatGPT on December 9, 2022. I recorded my first impressions in a podcast shortly thereafter (Sorensen, S. 2022a). I recognized early its potential for rapidly becoming significant and impactful in our business and everyday lives. Prompt by prompt, I have honed my utilization of conversational AI, improving both my business practice and the quality of my coaching conversations. I have also advocated AI use and evangelized business leaders and employees who need to learn how to use and prepare for AI integration into our businesses and everyday lives (Sorensen, S., 2023a).

Despite the prevalence of AI knowledge among the public, many are yet to engage deeply with its capabilities. Recognizing this technology's potential disruption and power, I am committed to assisting coaches and small-to-medium-sized business owners to leverage AI in ways yet to be widely explored. This commitment led to the publication of three books on AI and executive coaching:

"Next 10: Coach Wisdom for Entrepreneurs, Business Owners, and CEOs Wondering What Moves to Make Next" (2022b); <https://amzn.to/43Iiidj>.

"The AI Whisperer: Handbook for Leveraging Conversational Artificial

Intelligence & ChatGPT for Business" (2023b); <https://amzn.to/3WQ0bQp>.

"The AI Whisperer Draws: AI Art Made Easy for the Non-Technical User Through MidJourney" (2023c); <https://amzn.to/3oVjECG>.

These works, aiming to demystify AI use in business and coaching, have topped bestseller lists, demonstrating the hunger for such knowledge.

I have witnessed an explosion of creativity in co-created conversations by integrating tools like ChatGPT, Google Bard, Microsoft Bing Chat, and Fusion AI. This increased ideation and curiosity assists clients in generating thoughtful questions and solutions. However, as the adage goes, 'With great power, comes great responsibility.' Thus, my objective is to guide coaches and business users toward ethical and responsible AI use.

### **My leap from human-only to AI-enhanced coaching**

In its purest form, 'life coaching' can be performed by coaches bringing no prior knowledge to the coaching session other than curiosity, great questions, active listening, and a desire to serve and co-create a conversation with their client. These skills, while essential, are insufficient for the executive coaching domain when dealing with business issues; it is often the case that having some prior context, knowledge, or understanding of business is essential to facilitating a helpful coaching conversation for clients.

Executive coaching extends beyond life coaching, often demanding prior business-related knowledge (and, at times, with permission, mentoring) to facilitate

meaningful conversations. I strongly advocate 'solution-focused' coaching, as described so eloquently by Bill O'Connell and Stephen Palmer (2019), wherein 'the coach facilitates but does not interfere with, nor take over, the coachee's unique solution-building processes.' As an executive coach, my goal is to serve my clients' highest hopes, preparing seed questions based on their specific 'how do I' queries to foster engagement and mindful ideation leading to goal setting. I am also mindful of the importance of fostering a positive and proactive coaching relationship and that it involves active participation by the coach and coachee (de Hann E, and Gannon, J. 2017). Part of my engagement and commitment to coaching is what Gan and Chong (2015) regard as "commitment" to fulfill responsibilities in the coaching relationship that include prior preparation for the coaching session (by Coachee and Coach) and identifying and engaging in goals during the session.

Additionally, drawing on the work of the late Professor Anthony Grant (2014), an 'overall goal-focused (and task-focused) approach' was indicated to be beneficial to the executive coaching relationship achieving greater coaching success. Furthermore, 'goals as internal representations of desired states or outcomes are central to coaching' (Grant, A.M. 2019). And following the insights of Clutterbuck, D., and Spence, G (2017), 'developing a nuanced understanding of goals, something greater than SMART goals, is critically important for coaches if they are to render an optimal form of support for their clients. Part of this nuance is being highly client-centric and actively supporting clients' needs, and asking questions to help them better vocalize their needs and help coaches set achievable goals and pathways to achieve them.

In this spirit, in my executive coaching practice, I have encouraged my executive coaching clients to apprise me 72 hours before their coaching content agendas for our upcoming coaching sessions. Then, regarding my preparation for coaching conversations with these same clients, I curate material for potential question prompts and discussion fire-starters for our sessions. Over the years, I have amassed a digital library of over 133+ electronic folders on various business topics, each containing curated data, insights, and tools to enrich coaching sessions. The content is based on the common coaching topics raised by my clients, allowing me to conduct targeted research ahead of the coaching sessions. Importantly, this aligns with the coaching ethos, focusing on empowering clients through pertinent questions rather than resorting to mentoring, consulting, or counseling.

In December 2022, I published "Next 10: Coach Wisdom for Entrepreneurs, Business Owners, and CEOs Wondering What Moves to Make Next" (Sorensen, S, 2022b), a book written from curated material in my folders along with the assistance of ChatGPT. Next 10 addresses forty executive coaching topics of the 133+ in my files, and it provides ten step-wise questions for each topic, aimed at supporting coachees through their decision-making processes. The purpose is to illuminate the critical decision-making considerations before deciding on a given topic. Now with AI, we can provide the same level of critical decision-making support for a limitless number of topics.

Subsequently, I have increasingly integrated conversational AI, particularly ChatGPT, into my executive coaching sessions, and I recognize its potential for creativity, curiosity, exploration, and nuance. AI served

to expand the conversation, introducing perspectives that align with coachees' intentions, and creating new material for their consideration. The collaboration with AI has allowed for immediacy, increased perspective, and deepened explorations, significantly augmenting the value offered to my clients. They reported greater insights, clarity, and appreciation for the enriched wisdom brought into our sessions by AI.

I also utilize Fathom Notes, an AI tool, to transcribe and summarize Zoom sessions, providing AI-powered summaries to my clients. The synergistic use of these AI resources has yielded impressive results, as validated by my clients' high self-rating scores. They appreciated the AI augmentation in our sessions, the curiosity it instills, and the clarity it provides in mapping their personal and professional trajectories.

In this paper, I advocate for the triad coaching session structure comprising the coach, coachee, and an AI assistant. This arrangement allows for a dynamic, collaborative approach, with all three participants contributing to a harmonious dance aimed at providing superior value to our clients—the coachees.

## **2 The Role of AI in Coaching**

Integrating artificial intelligence (AI) technology into the coaching process has emerged as a transformative development, offering new possibilities and reshaping the dynamics of the coaching relationship. AI, defined as the simulation of human intelligence in machines, presents a range of applications in coaching, augmenting coaches' abilities, and providing enhanced support to coachees. In this section, we examine AI's multifaceted role in coaching,

drawing insights from scholarly contributions and established coaching bodies such as the International Coach Federation (ICF) and the European Mentoring and Coaching Council (EMCC).

Coaching, as defined by the ICF, involves a partnership between the coach and the coachee in a thought-provoking and creative process that inspires the coachee to maximize their personal and professional potential (ICF, 2021). Similarly, the EMCC emphasizes the collaborative nature of coaching, supporting the coachee's learning and growth through a collaborative relationship (EMCC, 2015). Introducing AI into coaching expands the concept of co-creation, transforming the coaching triad into a dynamic interplay between the coach, coachee, and an AI coaching companion.

AI tools such as ChatGPT and Fathom Notes have emerged as valuable assets in the coaching landscape. These tools leverage natural language processing and machine learning algorithms to facilitate real-time interactions between the coach, coachee, and AI companion. Through AI integration, coaches aim to enhance the coaching experience, provide immediate insights, and co-create new materials for exploration.

The work of Professor Erik de Haan, renowned for his contributions to coaching psychology, highlights the role of co-creation in coaching and explores the potential of AI as a co-creative partner (de Haan, 2014). Professor Jonathan Passmore's research delves into the concept of co-creation in coaching and its impact on coaching outcomes, focusing on meaning-making and transformative change (Passmore, 2010). These scholarly contributions underscore the significance of co-creation in coaching and the potential of AI-enhanced processes.

AI in coaching enables immediate insights and nuanced perspectives. Coaches can access a wealth of information, research findings, and case studies in real-time, enhancing their ability to comprehensively explore topics and facilitate richer discussions. The analytical capabilities of AI tools enable coaches to uncover hidden connections and patterns in coachees' responses, fostering deeper self-awareness and personal development (Bachkirova, 2011).

Furthermore, the integration of AI fosters the co-creation of new materials. The collaborative interplay between the coach, coachee, and AI generates unique insights, perspectives, and resources. This co-creation process, in line with the principles of appreciative inquiry (Bush, 2008), narrative coaching (Drake, 2012), and systemic team coaching (Hawkins, 2012), allows for a broader range of inputs and facilitates creative problem-solving.

It is essential to approach AI in coaching with ethical mindfulness. Coaches must ensure that the principles of coaching psychology, including autonomy, self-determination, and confidentiality, remain at the core of the coaching process. The works of Professor David Clutterbuck emphasize the importance of co-created meaning-making, trust-building, and learning partnerships in coaching (Clutterbuck, 2004).

In conclusion, integrating AI technology in coaching expands the possibilities for co-creation and enhances the coaching experience. AI tools provide immediate insights, foster nuanced perspectives, and co-create new materials. However, ethical considerations should guide the responsible application of AI in coaching, ensuring that

the coaching relationship remains centered on the coachee's goals and aspirations.

### **Section 3: Co-Creating Conversations**

The concept of co-creation lies at the core of coaching psychology, emphasizing the collaborative and participatory nature of the coaching relationship. In this section, we delve into the dynamics of co-creation in coaching, drawing insights from scholarly contributions and established coaching bodies such as the International Coach Federation (ICF) and the European Mentoring and Coaching Council (EMCC). Additionally, we explore the contributions of scholars in the field to deepen our understanding of the co-creation process.

Coaching, as defined by the ICF, involves a partnership between the coach and the coachee in a thought-provoking and creative process that inspires the coachee to maximize their personal and professional potential (ICF, 2021). Similarly, the EMCC emphasizes the importance of a collaborative relationship that supports the coachee's learning and growth (EMCC, 2015). Co-creation becomes a fundamental aspect of the coaching process, highlighting the coach and coachee's active involvement and contributions.

Integrating AI technology further expands the concept of co-creation, introducing an AI coaching companion into the coaching triad. Scholars like Dr. Nancy Kline, have emphasized the significance of creating a safe and collaborative thinking environment in coaching (Kline, 1999). This collaborative space allows for open exploration, active listening, and co-creating transformative conversations.

The work of Dr. Peter Hawkins has shed light on the dynamics of co-creation within

teams and organizations, fostering a coaching culture that supports collaboration and growth (Hawkins, 2012). Within this context, the coachee and coach, aided by the AI companion, engage in dialogue, jointly shaping the coaching process and co-creating new material.

The AI coaching companion, utilizing tools such as ChatGPT, Google Bard, MS Bing Chat, and Fathom Notes, actively engages in the coaching conversation by providing prompts, questions, and responses based on the coachee's desires and intentions. This co-creative partnership between the coach, coachee, and AI enables the exploration of novel perspectives, the development of tailored resources, and the emergence of fresh insights.

The importance of co-creation in coaching is further reinforced by the work of Dr. David Drake, who highlights the power of narrative coaching and the co-creation of stories that shape perspectives, possibilities, and personal transformation (Drake, 2012). Through the collaborative construction of narratives, the coach, coachee, and AI companion collectively contribute to creating meaning and exploring new avenues.

It is essential to approach the utilization of AI in coaching with ethical mindfulness, ensuring that the principles of coaching psychology, including autonomy, self-determination, and confidentiality, remain at the forefront. The works of Dr. Mary Wayne Bush emphasize the value of strengths-based approaches in coaching, fostering co-creative relationships that facilitate personal and professional development (Bush, 2008).

In conclusion, co-creation is vital to coaching psychology, enabling collaboration and shared exploration between the coach,

coachee, and AI companion. The integration of AI enhances the co-creative process, providing immediate insights, prompting thought-provoking questions, and co-creating new material. Ethical considerations should guide the application of AI in coaching, ensuring that the coaching relationship remains client-centered and driven by the Coachee's goals and aspirations.

#### **Section 4: Exploring the Potential of AI in Co-Creation**

With the background established on the role of AI in coaching and the importance of co-creation, we now turn our attention to the potential of AI in co-creating conversations between the coach, coachee, and AI. As AI continues to evolve, it presents present-day applications and untapped possibilities to enhance the coaching process. In this section, we delve into how AI is currently being used and explore the potential for future applications. We draw examples from the opening statement on using AI in a co-creative process.

##### **4.1 Current Applications of AI in Co-Creation**

AI technology, such as ChatGPT, Google Bard, MS Bing Chat, and Fathom Notes, is being leveraged to augment the coaching experience. AI tools act as intelligent assistants, providing immediate insights, generating prompts and questions, and co-creating new material for exploration. The collaborative interplay between the coach, coachee, and AI enriches coaching conversations with diverse perspectives and resources.

As I mentioned earlier in my introduction, I have integrated AI in various ways in my own coaching practice. By utilizing AI tools

such as ChatGPT, I have brought immediacy, nuance, and additional considerations to coaching sessions. AI's ability to analyze data patterns and recognize hidden connections has enabled you to uncover insights from coachees' responses, guiding them towards deeper self-reflection and personal development. Additionally, AI tools have facilitated the co-creation of new material, generating tailored resources and prompts based on the coachee's desires and intentions. Fathom AI captures the Zoom video-based coaching conversations and uses AI to create a summary of the session, key takeaways, questions asked, commitments, etc.; notably, these notes can be shared with the coachee to enhance their recall and memory of the session, their ideations, and commitments.

There are many potential use cases for AI in co-creation in a coaching session, and I have included ten important ones below. These ten are not the only ten categorical use cases. However, they do represent some of the most accessible and easy-to-use cases for coaches to start exploring in their coaching sessions with the coachee and AI assistant. To aid the reader's understanding of these use cases, I have used illustrations of typical business uses that small to medium size businesses (SMBs) have using typical business questions from the top twenty industry types that these business leaders may confront in their daily business decision-making requirements:

1. **Possibilities Thinking:** AI can generate a wide range of possibilities and alternative perspectives, encouraging both the coach and coachee to explore creative solutions and think outside the box. By leveraging AI's computational power and access to extensive knowledge

bases, it can provide novel ideas and potential avenues for exploration.

- a. Use Case: Generating innovative ideas and exploring new business growth and expansion possibilities.
  - b. How to Use: Engage AI in a brainstorming session to co-create a list of potential strategies or approaches.
  - c. Example Prompts: "Let's do some potential possibilities thinking for expansion of X in our industry?" or "AI, let's explore unique market entry strategies for expanding into new regions." or "What are some innovative product/service ideas that align with our core competencies?"
2. Issue Identification: AI can help the coach and coachee identify and clarify the underlying issues or challenges that the coachee is facing. Through analyzing data patterns and listening to the coachee's input, AI can assist in pinpointing the critical areas of focus, allowing for a more targeted coaching approach.
- a. Use Case: Identifying key challenges or bottlenecks hindering business performance.
  - b. How to Use: Discuss with AI the current business landscape and invite insights on critical issues.
  - c. Example Prompts: "AI, based on the market analysis that I have provided, and using your own knowledge of other market facts that may be available to you, what are the

main obstacles we need to address?" or "From the research, what are primary potential key factors impacting our customer retention rate?"

3. Problem-Solving: AI can support the coachee in analyzing complex problems, breaking them down into manageable components, and exploring potential solutions. Applying algorithms and leveraging AI's analytical capabilities can facilitate the co-creation of problem-solving strategies and assist in evaluating their feasibility and potential outcomes.
  - a. Use Case: Resolving complex business problems and finding practical solutions.
  - b. How to Use: Collaborate with AI to analyze data and co-create a problem-solving framework.
  - c. Example Prompts: "Help me ponder and write a compelling letter to resolve a dispute for unanticipated auto-renewal and cancellation challenges with an online subscription service provider." "AI, using the data provided in this worksheet, what can AI see or interpret from the that may not be readily visible to someone without a financial background?" "AI, let's break down the supply chain challenges and explore potential solutions." or "What strategies can we implement to reduce operational costs



without compromising quality?"

4. Ideation and Brainstorming: AI can facilitate the generation of ideas and support the coachee in brainstorming sessions. By providing prompts, suggestions, and creative stimuli, AI can encourage a flow of ideas and expand the range of possibilities. This co-creative process between the coach, coachee, and AI can inspire innovative thinking and foster a collaborative ideation environment.

- a. Use Case: Generating creative ideas to improve products, services, or processes.
- b. How to Use: Engage in a brainstorming session with AI to co-create a list of innovative ideas.
- c. Example Prompts: "Let's ideate for a moment on X? Here is what we have already done; based on this input from the research, what other possibilities might we explore?" "AI, let's generate ideas for enhancing customer experience in our e-commerce platform." or "How can we leverage emerging technologies to streamline our production process?"

5. Role-Play: AI can simulate scenarios or act as a virtual partner for role-playing exercises. AI can help the coachee practice and refine their communication, leadership, and interpersonal skills by providing responses and engaging in dialogue. This allows for experiential learning and enables the coachee to gain

insights into their behaviors and explore alternative approaches.

- a. Use Case: Practicing and refining leadership or communication skills.
- b. How to Use: Utilize AI as a virtual partner for role-playing exercises to simulate real-life scenarios.
- c. Example Prompts: "Let's role-play for a moment; in this scenario, you are the job interviewer, and I'm the job candidate for this position [name job role]." "AI, let's practice delivering a persuasive presentation to a potential investor." or "AI, let's engage in a conversation as if you are addressing a challenging employee performance issue."

6. Interviewing and Questioning: AI can assist in conducting interviews or providing structured questioning techniques. By generating relevant and thought-provoking questions, AI can help the coach guide the coachee's self-reflection and facilitate a more profound exploration of their thoughts, emotions, and perspectives.

- a. Use Case: Conducting structured interviews or enhancing questioning techniques.
- b. How to Use: Collaborate with AI to generate relevant and thought-provoking questions for essential discussions.
- c. Example Prompts: "AI, provide a set of probing questions to assess the effectiveness of our marketing strategy." "What

are the most important factors to consider when making a 'buy, lease, or build' decision for X." or "What key questions should we ask during candidate interviews to assess their cultural fit?"

7. Scenario Building: AI can support the coachee in creating and exploring different scenarios for decision-making or envisioning future possibilities. By considering various factors and potential outcomes, AI can co-create scenarios that the coachee can evaluate and consider in their decision-making process.
  - a. Use Case: Exploring potential scenarios for strategic decision-making or future planning.
  - b. How to Use: Co-create different scenarios with AI to evaluate potential outcomes and inform decision-making.
  - c. Example Prompts: "AI, let's simulate various financial scenarios to evaluate the viability of our expansion plans for a restaurant business. Let's use an example of bringing an existing franchise operator into St George, UT (e.g., Aunt Juanita's Mexican Cantina) vs creating our own brand using favorite recipes and forgoing the branding

and marketing franchise costs." or "What are the possible outcomes if we invest in adopting sustainable practices in our manufacturing processes?"

8. Data Analysis and Insights: AI can assist in analyzing complex business data, such as financial reports, market trends, or customer feedback, to provide valuable insights and inform decision-making. By leveraging AI's data processing capabilities, coaches can collaborate with coachees to explore patterns, identify opportunities, and make informed strategic choices.
  - a. Use Case: Analyzing business data to gain insights and inform decision-making.
  - b. How to Use: Collaborate with AI to analyze financial reports, market trends, or customer feedback.
  - c. Example Prompts: "AI, analyze our sales data and identify trends to optimize our pricing strategy." or "What insights can we gather from customer feedback to enhance our product offerings?" or "What are AI-informed solutions or providers that can help me analyze my MS Excel or CSV file format spreadsheets?"<sup>2</sup>

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<sup>2</sup> Note, presently, ChatGPT can't directly process CSV files or any other type of file, nor does it direct access or interact with external databases, files, or systems. However, you can extract insights or specific data points from your CSV file and provide those in text form for analysis. For example, you could provide the average sales of a product over

time, the average price point, or any other relevant metrics, and I can help analyze those data points.

In the future, OpenAI may release models with updated capabilities that could process files directly, but as of now, this functionality is not supported. For now, consulting with a data analyst or using data analysis tools for direct CSV file analysis is best.

## 9. Emotional Intelligence

Development: AI can support the development of emotional intelligence (EI) by providing real-time feedback and analysis of verbal and non-verbal cues during coaching sessions. AI-powered tools can assist in recognizing emotional patterns, enhancing self-awareness, and fostering emotional intelligence skills in leadership and interpersonal interactions.

- a. Use Case: Developing emotional intelligence skills

- b. How to Use: Leverage AI's real-time feedback on verbal and non-verbal cues to enhance self-awareness in the coaching process.
- c. Example Prompts: "AI, provide feedback on my communication style during a challenging team discussion." or "How can I improve my ability to empathize and connect with team members

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Additionally, one can integrate with GPT APIs to access data sets directly or use one of the many AI-informed providers that offer such capability. Today, many companies are leveraging artificial intelligence to process and analyze data from CSV and Excel files. They use various tools, technologies, and services that incorporate machine learning, artificial intelligence, and other advanced techniques to derive insights from data. Here are a few examples:

**Tableau:** Tableau is a business intelligence and data visualization tool. While not AI per se, it has some AI-powered features like "Ask Data" and "Explain Data," which use natural language processing to help users understand their data better.

**Microsoft Power BI:** Power BI is another business intelligence tool with AI functionalities. It allows you to analyze data and share insights across your organization or embed them in an app or website.

**IBM Watson Analytics:** Watson Analytics is an AI-powered data analysis and visualization service on the cloud. It's designed to guide you to discover patterns and meanings in your data.

**Google Cloud's AutoML Tables:** This service allows you to build and deploy machine learning models on structured data automatically. It's capable of handling CSV files stored in Google Cloud Storage.

**DataRobot:** DataRobot offers an automated machine-learning platform for data scientists of all skill levels to build and deploy accurate predictive models. It can ingest data in various formats, including CSV and Excel.

**RapidMiner:** RapidMiner provides a data science platform that includes data preparation, machine learning, and model deployment. It can process CSV and Excel files, among other data types.

**Alteryx:** Alteryx is a self-service data analytics platform that allows users to combine data from disparate sources, including CSV and Excel, and perform analytics.

**Snowflake:** Snowflake is a cloud-based data warehousing platform designed for data storage and analytics. It's fully managed and offers scalable computing power and storage capacity. While not an AI tool itself, it can efficiently store and manage the data necessary for AI and machine learning processes.

Remember to consider the specific needs and context of your business when choosing a data processing and analysis solution. The best solution depends on various factors, including the size and complexity of your data, the skill level of your team, and the specific insights you wish to extract from your data.

during difficult conversations?"<sup>3</sup>

10. Change Management Support: AI can aid in navigating change and organizational transitions. Through AI-powered simulations, coaches can co-create scenarios that reflect potential challenges and opportunities associated with organizational change. This enables CEOs, key executives, or business

owners to explore strategies, anticipate outcomes, and develop practical change management approaches.

- a. Use Case: Navigating organizational change and transition effectively.
- b. How to Use: Utilize AI-powered simulations to co-create scenarios reflecting potential challenges and opportunities.

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<sup>3</sup> Note, as conversational AI, ChatGPT does not presently witness nor directly perceive your real-world interactions or communications. That being said, one can provide a description or summary of your actions and responses during the discussion, and ChatGPT can provide general advice based on that description. ChatGPT can also recognize tone, context, and emotional cues in your writing. For example, you might say: "During the discussion, I noticed that I was interrupting others a lot, and some team members seemed frustrated." Based on that, ChatGPT could advise: "Interruption can often lead to frustration, as it can prevent team members from feeling heard. In the future, try to make a conscious effort to allow others to finish their thoughts before you respond. You might also want to acknowledge what they've said, which can make them feel valued and understood." This is a simplified example, but it should give the coach an idea of how the process might work. By reflecting on your own actions and responses and considering feedback based on established principles of emotional intelligence, you can work to improve your EI. AI technology has seen vast improvements in analyzing audio and video data to gain insights into human behavior, emotion, and communication patterns. This has potential applications in many fields, including customer service, human resources, mental health, and personal development.

There are a number of companies that have developed AI-informed products or services that utilize AI to analyze audio and video data, including:

**Cogito:** This company provides AI software that analyzes voice data in real-time during customer service calls. The system offers live coaching for

customer service representatives, suggesting when they should speak more slowly, empathize with the caller, or show more energy, among other things.

**Affectiva:** They are an emotion measurement technology company that developed emotion recognition technology based on analyzing facial cues or voices. This technology is used in a variety of industries, from advertising to automotive design.

**HireVue:** HireVue offers an AI-driven platform for conducting and analyzing job interviews. The system analyzes word choice, tone, and facial movements to assess a candidate's fit for a role.

**Beyond Verbal:** This company specializes in voice analytics. They have developed technology that uses AI to analyze emotional and health-related features in human voice patterns.

**Brainalyzed:** Brainalyzed Insight is an AI platform used for training and analyzing AI models. It analyzes and visualizes emotional intelligence, allowing users to gain insight into human interactions and communications.

**Talkwalker:** Talkwalker's AI engine analyzes text, images, and audio data for customer sentiment, helping businesses understand their audience's opinions and sentiments better.

While these technologies are powerful, they are not infallible and should not replace human judgment and understanding. Additionally, the use of AI for audio and video analysis raises privacy and consent issues, and it's crucial that these technologies be used responsibly and ethically.

- c. Example Prompts: "AI, simulate different change management strategies for implementing a new organizational structure." or "What are the potential risks and benefits of adopting a new technology platform?"

In summary, given their self-reports and company reports of progress and intentional steps taken after coaching sessions, I have used these 10 use cases in coaching with great success with my clients. As an executive coach, the use of AI in coaching sessions for CEOs, key executives, or business owners can be applied in various ways, ranging from thinking and issue identification to problem-solving and change management support. By co-creating with AI, coaches can explore innovative ideas, tackle complex challenges, and develop critical skills necessary for driving business success in diverse SMB industries.

#### 4.2 Untapped Potential of AI in Co-Creation

While the applications outlined in section 4.1 support the efficacy of AI in coaching, its potential extends far beyond the current exploration, holding the promise of uncharted dimensions that could further enrich the coaching process. As AI evolves, it continues to amass vast data, research findings, and collective knowledge, making it poised to offer fresh perspectives and unique insights. Its capacity to ideate and 'future cast' can lead us down paths hitherto unimagined.

It has been posited that the limits of human achievement are bound only by what the mind can perceive and believe (Hill & Stone, 1960). This concept suggests that envisioning a particular outcome can often lay the groundwork for a reverse

engineering process, enabling the systematic deconstruction of steps toward actualizing the envisioned result. This approach invokes a didactic mechanism, facilitating a learning pathway toward the creation of the initially conceived entity.

Here's a specific example of this notion using AI in one of my coaching sessions. A strategy for ideation and creativity that I use in my coaching sessions is for my clients to think of their future, or the future of their industry, and envision the future state, and work back to the present state. For instance, my client wanted assistance from AI to do some future visioning of their industry. With this client's request, I suggested that they ask the AI (ChatGPT) to construct a fictional narrative of 2060, focusing on AI's beneficial impact on productivity and efficiency in a specific industry, couched in terms comprehensible to a 2023 audience. The Coachee's curiosity was ignited by the AI's imaginative projection into the future, particularly when it expanded on a unique idea that resonated with them. The Coachee remarked, "That's awesome; how do I do that?" As a coach, I supported my client in crafting the subsequent AI prompt further instructing the AI to formulate a systematic (step-wise) method to implement this innovative concept. This generated a script and pathway for The Coachee to explore a heretofore unknown and unprecedented idea that The Client and their respective industry had not yet considered.

From this example, one can see that coach's role, given the linguistic essence of conversational AI, becomes even more crucial in the coaching triad. The coach aids the coachee in verbalizing their intentions to AI, enabling the AI to generate higher value for the coachee. This anecdote underscores the transformative power of the 'Triad': Coach, Coachee, and AI. This underscores

my belief that AI will not replace executive coaches; executive coaches who know how to use AI effectively will replace coaches who do not learn how to use this critical new technology and coaching aid.

Integrating AI into my coaching practice has proven immensely beneficial, yet we are only on the cusp of realizing AI's full potential. Shneiderman (2007) spoke of using creativity support tools to accelerate discovery and innovation. Nowhere is this more evident than with AI's ability to recognize patterns and analyze data paves the way for unearthing novel connections, innovative solutions, and unconventional approaches, which might elude human cognition. By harnessing the capabilities of AI more effectively, we can tap into its vast reservoir of knowledge and computational power, co-creating even more insightful and transformative coaching conversations.

AI can support the generation of novel lines of inquiry, propose alternative strategies, and provide cross-disciplinary insights drawn from its extensive knowledge base, fostering creativity, aiding decision-making, and broadening coachees' perspectives. Moreover, AI's ability to learn and adapt continuously (Russell & Norvig, 2020) offers personalized, evolving support to coaches and coachees alike, enhancing the dynamism and richness of the coaching experience.

### 4.3 Ethical Considerations and Human-Centered Approach

The newness of AI and the rapid use cases create many uncharted territories of AI co-creation, underpinning the importance of a conscientious, ethically grounded, and human-centric perspective that cannot be overstated.

Eminent scholars on AI, such as Max Tegmark and Geoffrey Hinton, have consistently emphasized the ethical dilemmas associated with AI development. Tegmark, an esteemed physicist and AI researcher at the Massachusetts Institute of Technology, has discussed the potential existential threats posed by super-intelligent AI systems in his book "Life 3.0: Being Human in the Age of Artificial Intelligence" (Tegmark, 2017). He advocates for global cooperation to establish ethical safeguards and argues for a democratic approach to AI decision-making, inclusive of a diversity of perspectives.

Echoing these sentiments, Hinton, a pioneering figure in deep learning and a leading light in Google's AI initiative, has raised concerns about the potential misuse of AI in high-stakes decision-making arenas such as criminal justice or healthcare. He highlights the necessity of ensuring transparency and fairness in AI systems to mitigate unjust outcomes due to inherent biases (Hinton, 2018).

The perspectives of Tegmark and Hinton call for a proactive, deliberate approach to ethical considerations in AI use and development. Their work encourages scientists, policymakers, and society to collaboratively delineate acceptable AI applications, aiming to maximize its benefits while mitigating potential harms.

Establishing guiding principles for AI use is equally critical in the context of coaching and psychology, particularly within professionally regulated sectors such as law, mental health, and regulated wellness industries. Issues of privacy, security, data safety, and reliance on AI necessitate careful thought. AI's ability to provide quick suggestions and references might appear

beneficial, but as fact-checkers can affirm, this can sometimes lead to misinformation. Thus, the need for critical thinking is more pronounced in the era of AI.

As we venture further into AI's capabilities, the foundational principles of coaching psychology must be preserved. The role of a coach remains crucial in steering the co-creative process, ensuring that it remains client-centric, empowering, and tailored to the Coachee's goals.

As AI integration in coaching evolves, ethical considerations related to data privacy, confidentiality, and informed consent must be meticulously addressed. Transparent communication about the role and limitations of AI in coaching is paramount for building trust and facilitating a productive coaching partnership.

In my practice, I ensure privacy, safety, and data security by following a set of guidelines. Clients are provided with written agreements outlining confidentiality and disclosure requirements. Client's re-consent to being recorded at regular intervals. If potentially sensitive topics are raised, I seek The Client's preference for continuing the recording. While leveraging AI in coaching, I encourage clients to phrase their issues in a neutral, unidentifiable manner. Furthermore, in my contract, a specific period for data storage is mentioned, and the data is securely discarded after this duration.

Adopting a conscientious and responsible approach to AI integration can effectively harness its potential while respecting the human-centric values integral to coaching psychology. Continual evaluation and adaptation of AI use based on coachee feedback and ethical guidelines provided by professional bodies are vital.

## **5. Opportunities, Benefits, Risks, and Ethical Considerations of AI in Coaching**

### **5.1 Opportunities and Benefits of AI in Coaching**

Integrating AI technology into coaching opens up many opportunities and benefits that can enhance the coaching process. By leveraging AI tools, coaches can tap into immediate insights, nuanced perspectives, and knowledge, enhancing the overall coaching experience for both coach and coachee.

**Immediate Insights and Nuance:** AI-powered tools allow coaches to access real-time insights and nuanced considerations during coaching sessions. Bachkirova (2011) advocated a developmental coaching process that was part of philosophy, purpose, and process, along with appreciating the value of attention to mistakes and experimentation as important learning elements inside the coaching process. In this spirit, through AI's computational power and data analysis capabilities, coaches can uncover hidden patterns, connections, and research findings to deepen self-awareness and facilitate personal development. This integration of AI fosters a co-creative environment, enabling coaches to provide immediate value by offering timely and relevant perspectives.

**Co-Creation of Coaching Instruments:** AI tools can co-create coaching instruments such as step-wise decision ladders and tailored resources, much like a high-valued mentor. Clutterbuck (2004) wrote that mentoring is the most cost-efficient and sustainable method of fostering and developing organizational talent. Through collaborative interactions between the coach, coachee, and AI, coaches can

generate customized prompts, questions, and frameworks that guide coachees in their decision-making processes. This co-creation process empowers coachees, enhances engagement, and encourages exploration from multiple angles. Clutterbuck (2023) more recently wrote that what is needed now is for coaches to engage their emotional intelligence, intellect, empathy, ability to feel, and friendship and belief in the client. To sum up, coaches must be about being, not just doing. If all coaches are doing is doing, AI can do the doing so much better. AI is so quick to offer suggestions, and coaches ought to think more, or AI will indeed replace them.

**Expanded Possibilities for Exploration:** AI's vast knowledge base and computational capabilities provide coaches with expanded possibilities for exploration. By leveraging AI, coaches can generate innovative ideas, explore alternative strategies, and simulate different scenarios to help coachees expand their thinking and consider new perspectives (Passmore, 2010). The integration of AI fosters creativity, facilitates decision-making, and broadens the coachee's horizons.

## 5.2 Risks and Challenges of AI in Coaching

While AI in coaching offers immense opportunities, it is essential to acknowledge and address potential risks and challenges associated with its implementation. By proactively considering these aspects, coaches can ensure responsible AI usage and uphold the principles of coaching psychology.

**Overreliance on AI:** A critical risk lies in the potential overreliance on AI, which may overshadow the unique insights and skills that human coaches bring to the coaching relationship. Coaches must maintain their

role as facilitators, guiding coachees to effectively utilize AI as a supportive tool rather than a substitute for human interaction (Grant, 2009). Striking a balance between AI and human expertise is vital to preserving the core elements of coaching.

**Privacy and Data Security:** Using AI in coaching sessions requires careful attention to privacy and data security. Coaches must handle coachees' data securely and transparently, adhering to relevant regulations and guidelines. Maintaining data confidentiality and obtaining informed consent is crucial to establish trust and ensure the ethical use of AI in coaching.

**Ethical Considerations:** Ethical considerations play a pivotal role in integrating AI into coaching practice. Coaches must maintain transparency by communicating the role and limitations of AI to Coachees, enabling informed decision-making and ensuring Coachees' autonomy (ICF, 2021). Additionally, coaches should regularly reflect on AI usage's impact, seek coachees' feedback, and continually evaluate their ethical practices.

## 5.3 Mitigating Risks and Ensuring Responsible AI Usage

To mitigate risks and ensure responsible AI usage in coaching, coaches can adopt the following strategies:

**Clear Guidelines and Boundaries:** Establishing clear guidelines and boundaries regarding the role of AI in coaching sessions is essential. Coaches should communicate transparently with coachees, explaining how AI tools will be used, the data involved, and the coach's responsibility in guiding the coaching process.



**Continuous Reflection and Evaluation:** Coaches should regularly reflect on and evaluate their AI usage in coaching sessions. Seeking feedback from Coachees and staying attuned to their needs and preferences allows coaches to adapt their approach, refine AI tools, and ensure the coaching relationship remains client-centered.

**Professional Development and Education:** Keeping abreast of the latest advancements, ethical guidelines, and best practices in AI-enhanced coaching through ongoing professional development and education is crucial. Coaches should strive to enhance their knowledge and skills to navigate the evolving landscape of AI, ensuring responsible and ethical usage.

By proactively addressing risks, embracing opportunities, and upholding ethical standards, coaches can integrate AI into the coaching process, enhancing the coachee's experience and achieving meaningful outcomes. The co-creative partnership between the coach, coachee, and AI fosters a dynamic coaching environment combining human expertise and AI's computational power.

## **6. Ethical Considerations in AI-Enhanced Coaching**

### **6.1 Ethical Framework for AI-Enhanced Coaching**

Integrating AI technology into coaching brings about many opportunities and benefits, but it also necessitates careful consideration of ethical implications. In this section, we will examine the ethical framework for AI-enhanced coaching, addressing the opportunities and benefits and the risks and challenges associated with its implementation. By doing so, coaches

can ensure responsible AI usage and maintain the integrity of the coaching process.

### **Opportunities and Benefits:**

AI-enhanced coaching offers immediate insights, nuance, and considerations that enhance the coaching experience. Coaches can leverage AI tools to provide timely and informed perspectives, access knowledge, and co-create coaching instruments such as step-wise decision ladders (Clutterbuck, 2004). This partnership between the coach, coachee, and AI expands possibilities for exploration, fosters creativity, and empowers coachees to make informed decisions (Passmore, 2010).

### **Risks and Challenges:**

While AI presents immense potential, it is crucial to identify and address potential risks and challenges to ensure ethical AI integration in coaching. Overreliance on AI poses a risk of diminishing the human element and the unique insights that coaches bring to the coaching relationship. Coaches must maintain their role as facilitators, guiding coachees in utilizing AI as a supportive tool rather than a substitute for human interaction (Grant, 2009). Additionally, privacy and data security require careful attention, as coaches must handle coachees' data securely and transparently, adhering to relevant regulations and obtaining informed consent.

### **6.2 Ethical Considerations in AI-Enhanced Coaching**

To navigate the ethical landscape of AI-enhanced coaching, coaches should consider the following guidelines:

**Transparency and Informed Consent:** Coaches must be transparent about

integrating AI in coaching sessions and its purpose. Providing clear explanations about how AI tools will be used, the data involved, and obtaining informed consent from coachees are fundamental aspects of maintaining trust and respect for coachees' autonomy (ICF, 2021).

**Human-Centric Approach:** While AI can provide valuable insights and support, coaches should ensure that the coaching process remains centered on the coachee's needs and goals. Maintaining a human-centric approach means balancing AI tools with empathetic listening, deep questioning, and fostering a trusting and collaborative environment (Hawkins, 2012).

**Continual Reflection and Evaluation:** Coaches should regularly reflect on the impact of AI integration in coaching sessions and seek feedback from coachees. This process enables coaches to evaluate the effectiveness of AI tools, make necessary adjustments, and ensure that the coaching relationship remains focused on the coachee's growth and development.

**Professional Development and Education:** Coaches should engage in ongoing professional development and stay informed about the latest advancements, ethical guidelines, and best practices in AI-enhanced coaching. This commitment to continuous learning ensures that coaches are equipped with the knowledge and skills to navigate the evolving landscape of AI responsibly and ethically.

By adhering to these ethical considerations, coaches can embrace the potential of AI-enhanced coaching while upholding the principles of coaching psychology and maintaining the highest standards of professionalism and integrity. Ethical AI usage ensures that the coaching process

remains client-centered, empowering, and aligned with the coachee's best interests.

## **7. Examples of Triad of Coach, Coachee, and AI co-creating together**

This section presents three illuminating case studies on the triadic dynamic between the executive coach, the coachee, and an AI assistant. The first case, "Communicating in terms and language that the Coachee Understands," demonstrates how the executive coach can leverage the AI assistant to generate relevant and personalized content that resonates deeply with the coachee. This particular example shared reveals the power of AI in bridging communication gaps, using familiar cultural references to facilitate the coaching process, and imparting wisdom tailored to the coachee's context. The second case study, "Advice for Managing Remote Employees," presents an instance where AI was used as an information resource during a coaching session. Wherein AI provided a comprehensive list of suggestions and tools to support The Coachee's goal of remote workforce management, showcasing how AI can act as a valuable consultant in a coaching session. The third case, "Executive desires to improve operational safety and prevent foreseeable accidents," underscored AI's ability to access niche information on-demand, specifically heavy machinery equipment, to create a detailed and custom instruction set and a safety course. This example demonstrates the capabilities of AI in generating precise, practical, and efficient information. Here are the actual real-world case studies from my executive coaching practice:

### **Case A – Communicating in terms and language that the Coachee Understands.**

Coaching Situation: The CEO of High Performing Tech Company faces several high-stress decision-making situations. The CEO has a vision of an executive coach inspired by the fictional role of Wendy Rhodes on Billions. I informed my client of their fictional background of Wendy and that if she felt she needed a psychiatrist or LCSW, I would help refer the CEO to one with a good reputation. However, my client's current interest was the quips and witty wisdom that Wendy offers so frequently to her CEO client. So up for the challenge, as the CEO's executive coach with a capable AI assistant in the form of ChatGPT, I prompted: "Describe the role of the Ph.D. Executive Coach Wendy on the Show Billions and her valuable role to the CEO and the company. Using illustrations or concepts from various episodes, what are 20 thoughts or words of wisdom from Wendy to business executives?"

What was produced was a masterful list of questions and sage sayings from episodes, informed by actual psychologists and executive coaches. After that, in consideration of the CEO's current challenges, we added fun and banter to the coaching session by ideating around the 20 comments and their potential applicability or irrelevance to the CEO's current situation. The Coachee felt heard, the coaching content was personalized and curated for the Client, and the CEO expressed their heartfelt thanks for the quotes and asked to have them for their files.

Here are five of the twenty quotes and paraphrased wisdom nuggets captured by AI that Wendy has shared on the show Billions:

1. "Your biggest weakness can become your biggest strength." Wendy helps traders understand their weak points

and transform them into competitive advantages.

2. "We're not defined by our mistakes, but by how we correct them." Failure is part of business, but it's the recovery that determines the true character of an executive.
3. "Success isn't about luck; it's about preparation." Wendy emphasizes the importance of diligence and planning in achieving success.
4. "There's a difference between confidence and arrogance." Confidence drives success, while arrogance can lead to downfall.
5. "Great performance doesn't mean avoiding failure, but embracing it, learning from it, and then moving past it." Wendy encourages resilience and a growth mindset.

In this instance, the communication style requested was that of a familiar character. However, in my coaching sessions with other clients, I have also used ChatGPT to communicate in terms a 9<sup>th</sup> grader would understand, or that a 6<sup>th</sup> grader would understand, or in Spanish, or as a scholar or engineer might understand. The point is that being an effective executive coach demands communicating in the language, with terms and tone that the coachee understands at a deep level, and AI can help you do this more effectively.

### **Case Study B: Advice for Managing Remote Employees**

Situation: COO is looking to improve the management and engagement of their 100% remote workforce. We discussed the issue

together for a few minutes to further refine the issue, after that I asked the Coachee if we might ask AI what suggestions it might have; the Coachee agreed. We were having a Zoom video coaching session, so I shared my screen and prompted ChatGPT: “I find it difficult to manage remote employees; what are ways, tools, and methods to manage remote employees to get the most out of them, and let them lead the lives they want to lead?”

Then came the following reply from ChatGPT 4.0 and we discussed the items below in our coaching session.

“Managing remote employees can present unique challenges, but there are several ways, tools, and methods you can use to get the most out of your team while also allowing them the freedom to lead their lives. Here are some suggestions:

- Set clear expectations: Make sure your remote employees understand what is expected of them, including deadlines, goals, and performance metrics. This will help them stay focused and motivated and ensure that they are working towards the same objectives as the rest of the team.
- Use collaboration tools: There are many collaboration tools available that can help remote teams work together effectively, such as project management software, video conferencing tools, and instant messaging platforms. These tools can help ensure that everyone is on the same

page and that communication is flowing smoothly.

- Provide regular feedback: Regular feedback is essential for remote employees, as they may feel isolated and disconnected from the team. Make sure to provide feedback on their performance and offer suggestions for improvement, as well as recognizing their successes and accomplishments.
- Encourage social interaction: Social interaction is important for team building and can help remote employees feel more connected to the team. Consider scheduling regular virtual team-building activities or casual chats to help build relationships and boost morale.
- Be flexible: One of the benefits of remote work is that it allows employees to lead the lives they want to lead. Be flexible with schedules and work arrangements as much as possible while still ensuring that deadlines and goals are being met.
- Use outcome-based management: Instead of micromanaging, focus on the outcomes you expect from your remote employees. This will give them the freedom to work in the way that suits

them best while still ensuring that they are delivering results.

- Set up a communication plan: Establish a communication plan that works for everyone involved, including how often and through which channels you will communicate. This will help ensure that everyone is up-to-date and has a clear idea of what is expected of them.

Some tools you can consider using to manage remote employees effectively include:

- Project management tools like Asana, Trello, or Basecamp
- Video conferencing tools like Zoom, Skype, or Google Meet
- Instant messaging platforms like Slack, Microsoft Teams, or Discord
- Time-tracking and productivity tools like RescueTime or Toggl
- File-sharing and collaboration tools like Google Drive, Dropbox, or OneDrive.

Remember that managing remote employees effectively requires trust, clear communication, and a focus on outcomes. By setting clear expectations, providing regular feedback, and encouraging social interaction, you can create a productive and engaged remote team.”

And here is where the human comes into coaching. All of the above are useful tools and information. However, the research on the topic includes additional legal, HR, IT, data security, and other issues, and we added those topics to our conversation.

The lesson here is to think of AI today like a Level 1, 2, or 3 engineer, and you, as the executive coach, are the Level 4 engineer that guides the work of AI. While AI presently has lots of helpful information, sometimes the information is insufficiently nuanced to provide the complete or best answer, and that's where the human coach is so instrumental; you must bring your judgment, discernment, wisdom, and curiosity into the coaching conversation. Presently AI is best suited as the coach's assistant; it is not the coach, at least at this writing.

### **Case Study C: Executive desires to improve operational safety and prevent foreseeable accidents while using heavy equipment on job sites.**

Situation: There are times when clients have special equipment or needs that may be unfamiliar to the coach or coachee, but the equipment or needs may be quite familiar to AI that has access to legions of data. So exploring this issue more closely with the Client, I asked questions about the type of equipment, situations, and settings where accidents were most likely to occur. Then with permission, I asked the Coachee to join me online. Let's see what AI can find out about the use of specific, non-typical equipment used in heavy industry and what accidents it might prevent. Having listened to the Client and asking questions, I framed this prompt for ChatGPT: “Please write a safety instruction journey map for a step-wise instruction set, much like a pilot placard or surgeons pre-surgery instruction

card, to help a crane operator for a 2013 DEMAG AC 200-1 240 US TON (200 METRIC TON).” Clearly not your typical crane or request. Within moments, ChatGPT wrote a 7-step journey map of the requirements, with substeps for each phase. The executive was stunned that AI knew this odd piece of equipment and the particular phases they would typically recommend. Then take this a step further, as an executive coach, I prompted ChatGPT, “Let's go deeper with: 4.4. Monitor the crane's movements and the surrounding area for any potential hazards, such as power lines or obstructions. Provide examples of potential risks, and expand on how the operator may safely use all senses and equipment to increase awareness and safety.” Write a 60-minute course on this specific topic, and it did, creating the following Course outline.

Course Title: Enhancing Crane Operator Awareness and Safety: Identifying and Mitigating Potential Hazards

Duration: 60 minutes

Objective: Equip crane operators with the knowledge and skills to effectively identify potential risks in their operating environment and apply best practices to ensure safety while monitoring crane movements.

Course Outline:

Introduction (5 minutes)  
Importance of hazard awareness in crane operations  
Overview of potential risks and hazards  
The role of the crane operator in maintaining safety

Recognizing Potential Hazards (15 minutes)

Power lines: safe distances and precautions

Obstructions: overhead, on the ground, and in the crane's path

Nearby structures: buildings, scaffolding, and other cranes

Weather conditions: wind, rain, snow, and visibility

Ground conditions: uneven terrain, sinkholes, and load-bearing capacity

Human factors: unauthorized personnel, communication breakdowns, and distractions

Enhancing Awareness Through Senses and Equipment (15 minutes)

Vision: Maintaining clear lines of sight and using mirrors

Hearing: listening for unusual noises, alarms, and communication signals

Touch: feeling for vibrations or changes in crane movement

Load Moment Indicator (LMI):

Understanding and interpreting data

Cameras and sensors: effective use of technology to monitor surroundings

Communication and Coordination with the Ground Crew (10 minutes)

Establishing clear communication channels and protocols

Understanding and using standardized hand signals

Coordinating with the signal person to navigate potential hazards

Implementing Safe Operating Procedures (10 minutes)

Pre-operation planning: evaluating the site and identifying potential risks

Mitigating hazards: creating barriers, marking exclusion zones, and adjusting work schedules  
Emergency response: knowing when to stop operations and seek assistance

Conclusion and Summary (5 minutes)

Recap of key points  
Emphasizing the importance of hazard awareness and safety  
Encouraging a safety-first mindset in crane operations

The course will be delivered using a mix of lectures, visual aids, videos, and interactive discussions. Hands-on training exercises, including simulated crane operation scenarios, will help reinforce the learning objectives and provide participants with practical experience in identifying and mitigating potential hazards.”

What are my other coaching clients saying about the use of AI in their coaching sessions?

Fathom AI – Coaching Session Notes  
Feedback #1

Coach: So you know, I always like to ask how well you were served today on a scale of 1 to 10.

Coachee: Definitely a 10. It’s always a 10.

Coach: Well, it's always a 10, but why was it a 10 today?

Coachee: So I’m walking away with a lot of really good information and good insight. So I feel like this was definitely worth the 45 minutes, and I am excited.

Coach: Well, I'm excited for you as well.

Fathom AI – Coaching Session Notes  
Feedback #2

Coach: Okay, score today?

Coachee: I would say, I think it was a 9.

Coach: Okay. Why was it a 9? And what would make it a 10?

Coachee: I think for me personally, getting the agenda document over to you sooner and then having that one item spelled out a little bit more so it was a little clearer. But I think that working together to better define that was extremely helpful.

Coach: Well, I think it's exciting to be able to use all the tools. So as a coach, we would use ideation. Now with the super-intelligent tool of ChatGPT, we can do ideation, but sometimes it's just having the right seed and pressing in, and now you have the other part that we did on your instance. And so now [with Fathom AI] you have all your old memory of [our coaching session] that you can use. So I'm excited that it's in your hands. So cool. I think that it'll be fun to see what you're doing if you whip up and get completed on this before we talk again.

Coachee: Awesome. And I will say that it was very helpful last time to have the Fathom recording from you.

Coach: So we could do that again this time. I absolutely will send it right away.

Fathom AI – Coaching Session Notes  
Feedback #3

Coach: All right, listen, it's time for us to wrap up.

Coachee: Right, it’s hugely helpful.

Coach: What are you going to be accountable for?

Coachee: Game plan for myself for next week using what we've learned here using ChatGPT and organizing my thoughts into a reasonable, helpful manner.

Coach: Okay, I like that. That sounds great. So enjoy that.

Coachee: Thank you. It was a very fun conversation. It was great. Really pointed me in the right direction, Severin. I give it a 10. [Holding up 10 fingers].

Coach: All right, I'm going for 10. So that works.  
Yeah, if this were an 11, what would have made it better?  
Coachee: 11? It goes up to 11?  
Coach: It's only [a scale of] 10. I'm seeking extra credit.  
Coachee: I think if you just did it for me, that would be an 11.  
Coach: I really think you don't want that. You can get more out of the gate for what you wanted [with you doing the work]. We were able to get to it.  
Coachee: I did come in with nothing today.  
Coach: So, but we created a great experience. Imagine what it would be like [next time] when you came in [prepared].  
Coachee: I was like, look, Severin, I have these thoughts and this and that. Help me define this.

My intent in sharing these applications and use cases of AI within coaching sessions is to amplify the value and elevate the experience of coaching for my clientele, the coachee, and the sponsor organization. The philosophy underpinning this is to empower clients with the skills to fish, as opposed to merely catching fish on their behalf. In this regard, educating individuals on tools like ChatGPT and other AI resources, and guiding them in articulating contextual prompts that direct AI to create valuable insights, seems to spark a fervor of curiosity among many of my clients. This exposure to AI instigates a kindling of imagination and eagerness within clients, who subsequently anticipate further engagement with AI tools such as ChatGPT. Far from inhibiting knowledge acquisition or suppressing curiosity, AI has been observed to catalyze curiosity and incentivize clients to delve deeper, think wider, and do more. When approached with conscientiousness, AI has the potential to serve as a tremendous force

for good, provided we learn to harness and guide its potential appropriately.

The assortment of case studies and value summaries derived from my coaching sessions mentioned earlier provide potent anecdotal evidence of AI's transformative impact within executive coaching. It warrants exploration from researchers to quantify such effects using evidence-based methods, accounting for disparities in AI application within sessions, and evaluating differences. As a practitioner, I have witnessed and promoted the Triad of Coach, Coachee, and AI, and how this Triad can serve as an efficient, effective model for promoting comprehensive understanding, generating personalized content, increasing curiosity, and swiftly accessing pertinent information.

The potential scope of AI in augmenting a coaching session is vast and multi-dimensional, extending well beyond the few instances discussed herein. In addition to the use cases for AI in this article, I have identified numerous additional business use cases for AI in The AI Whisperer Series (Sorensen, S, 2023b, 2023c) and Next 10: Coach Wisdom for Entrepreneurs, Business Owners, and CEOs (Sorensen, S. 2022c). These materials collectively provide detailed insights into the possibility and innovative fusion of AI, coaching, and business leadership for the creation of novel opportunities and enhancements, and these insights merely graze the surface of AI's potential to help mankind.

As shared in episode 1126 of the Arete Coach Podcast, titled "AI Revolution and Jobs To Be Done" on May 15, 2023, AI is a pivotal technology with profound influences on businesses, executives, employees, and the coaches who guide them (Sorensen, S., 2023d). The AI revolution, as the latest



industrial upheaval, forecasts a radical transformation of the job market through automation, impacting multitudes of workers. Instead of dwelling on dystopian prophecies and passively awaiting the inevitable, I advocate for a proactive engagement with AI, and its beneficial applications and for preparing businesses and executives for the upcoming AI wave predicted to sweep across our workforces within the next 5-10 years.

Undoubtedly, the foreseeable workforce dislocation and temporary redundancies stemming from AI are immense. However, the projected creation of twenty-two high-demand jobs in the AI era (Sorensen, 2023e) provides abundant fulfilling, and meaningful employment opportunities for those willing to rise to the challenge.

In light of this paper, two of the twenty-two jobs poised for growth due to AI include vital positions for therapists, counselors, and coaches. While AI may instigate changes in the job market, leading to displacement and industry shifts, the role of therapists or psychologists, and coaches can provide crucial support to those undergoing such transitions. They offer counsel, guidance, and emotional support to help individuals cope with psychological and emotional challenges arising from job displacement or changes in their daily routines.

Our challenge now is to minimize harm and maximize support for displaced workers. What may appear improbable to some is the prospect of training our current workforce to fulfill future jobs in the AI age. Similar to how a truck driver in the year 2000 did not need to understand the workings of the truck engine but rather needed to interpret dashboard gauges and operate foot pedals and the steering wheel to safely navigate the truck to its destination, AI can simplify

complex tasks, creating metaphorical dashboards, foot pedals, and steering wheels to help future workers accomplish tasks with AI assistance.

In such a scenario, humans remain integral for their vision, perception, situational awareness, and discernment, while AI automates routine tasks to reduce errors, increase efficiency, and broaden our economic horizons. Now, more than ever, a commitment to lifelong learning is vital to stay relevant in the rapidly evolving AI landscape.

AI's growing presence in our world is undeniable and powerful. Our objective should be to promote its ethical use, fostering purposeful, beneficial applications that contribute to humanity's peaceful enjoyment of the planet. We must recognize AI's risks and dedicate resources to safeguard humanity. The potential of AI to be a catalyst for growth and prosperity or, conversely, a source of harm is contingent upon our engagement and ethical stewardship.

## **8 Conclusion**

In conclusion, integrating AI into coaching practices offers an exciting avenue for coaches to enhance their services and heighten their clients' outcomes. Through the collaborative dialogue between the coach, coachee, and AI, new possibilities emerge, instant insights are delivered, nuanced perspectives are formed, and a wealth of knowledge is unearthed. Leveraging AI tools such as ChatGPT enables coaches to broaden their toolkits, offering timely and tailored resources to guide clients on their self-exploration and decision-making journey.

However, it is vital to approach AI integration into coaching with mindfulness and an ethical lens. The challenges associated with AI dependency, privacy, and data security and ethical implications must be responsibly navigated. Coaches must remember their role as facilitators of the coaching process, preserving the human-centric approach and ensuring that the coaching relationship remains client-centric. Transparency, informed consent, and ongoing reflection are critical to mitigating risks, upholding ethical standards, and fostering a trust-inspiring and empowering coaching environment.

As we venture forward in this dynamic landscape, coaches must embrace a co-creative mindset, partnering with AI to create high-value client outcomes. The integration of AI in coaching holds immense potential to unlock novel insights, stimulate innovative thinking, and facilitate personal

growth. By harnessing the capabilities of AI tools and technologies while upholding the principles of coaching psychology and ethical guidelines, coaches can truly revolutionize the coaching experience, empowering individuals to navigate their professional journeys with clarity, purpose, and fulfillment.

In the spirit of exploration, I hope this article has illuminated the opportunities, benefits, risks, and ethical considerations surrounding the AI-enhanced coaching triad. May it inspire practitioners to embark on this path of co-creation, viewing AI as a supportive ally and fostering an environment conducive to growth, insight, and enduring transformation. Together, let us continue to propel the field of coaching psychology forward, harnessing the potential of ethical AI while staying true to the core principles that guide our practice and practitioners.

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