

Dressing for the Occasion: Using Morenian Methods and Presence in Coaching to Cultivate Agency

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Abstract: As a sociodramatist working in a variety of spaces from education across Europe to financial services in the United States, one of the most effective roles is that of a Present and Embodied Coach. Explaining role theory as ‘putting on the most appropriate clothes to suit the occasion’ has emerged as a simple way to explain that clients not only have agency around the roles they play in their lives, they also can have greater control over encounters with others as consciousness of their own state develops. Deploying sociodramatic tools such as the Cultural Atom and Role Reversal as well as presence techniques from the world of coaching, this paper shares case studies and practical tips that serve both coach and client.

Keywords: Role Theory, Coaching, Presence, Cultural Atom, Sociodrama

1. Introduction

While the use of Psychodrama for clinical purposes is established as an effective and creative method for treating those with mental illness, the deployment of Morenian methods in non-clinical settings is not as well documented.

“J.L. Moreno believed we are essentially relational, and that we manifest relationship to self and others through a repertoire of roles in which we interact with the world. He defined roles as ‘the actual and tangible forms which the self takes.’ Our well-being can be measured by the number of roles we encompass. Each developed, integrated role gives us another possible set of responses to the world. Every time we expand a role, we empower ourselves and take another step towards a coherent whole.” (White 2011, p. 14)

One-to-one coaching in the Learning and Development space offers a ripe field for experimenting with action-based methods, particularly role theory, and at a time when concepts such as presence and embodiment are beginning to be more widely accepted, if not altogether understood and adopted.

2. From Anxious Imposter to Powerful Communicator

Jo is a financial services executive in a large, multi-national company based in the United States. During a group coaching session that was part of a leadership development programme, Jo explained how she had become very anxious when asked to be part of a panel that as she saw it was full of people who were ‘bigger’ than her.

Remarks The names of clients referred to in the paper have been altered.

She told us how during the first prep session for the panel, she took copious notes of everything that was said, worried she would miss something important. The feeling that she was 'not supposed to be there' loomed large and her note taking was a comfort.

"With the panel, we had several prep sessions leading up to (it) with all the panellists. I think the very first one I was very uneasy, not knowing many details about it and knowing that the people I was going to be sharing the panel with were quite senior and just wanting to learn what the expectations were but not coming off any sort of way, sort of like I shouldn't be there, just classic imposter syndrome." (Interview with 'Jo', 18 July, 2023)

She took up my suggestion that in the next session, she would try putting her notes down and experience the meeting, trusting herself that she would remember what was important.

What followed was revelatory for her and we processed it in one of our one-to-one sessions:

"I... put my computer away and... I was... speaking to people as I would if they were in front of me and I found that doing that naturally led me into the role of Powerful Communicator which was the way I was seeing the other panellists but not seeing myself. Being present allowed me to tap into that role during those meetings. And so, by the time we had the actual panel... I had felt comfortable in that role, had been playing that role quite a bit in the prep sessions... I could just snap into that role, which was super helpful. The whole role thing requires being present and being super self-aware as well which I found helpful in general."

Jo first told me about the panel in our initial one-to-one session and described herself as having a serious case of the Imposter Syndrome. This opened the door for me to talk about roles and that the Imposter is a common one. It arises when people negatively compare themselves to others and find themselves wanting. In Jo's case, she was not senior enough, not experienced enough, not clever enough, just overall not good enough. We began an exploration together of what it meant to feel like an imposter and how she might choose a role that would enable her to make the most of the opportunity to raise her career profile through a solid performance on this panel.

The enthusiasm and ease with which Jo adopted the concept of roles and used it to her advantage to not only connect more directly to her colleagues but also to feel more like the self she wants to present to others is the inspiration for this paper.

3. Coaching as a developmental tool instead of a form of physical transport

Although coaching as a profession in the context of business and the workplace is relatively new, "the first use of the word "coach" seems to be in an academic setting at the University of Oxford in the 1830s. In this case, the 'coach' was used to refer to a tutor who supported students with their academic work. It was initially used informally, suggesting that a tutor would take a student from point A to point B-much like a coach (or carriage), which would similarly take individuals from point A to point B (Online Etymology Dictionary, 2020; Nieuwerburgh, et al., 2018)." (Eliadis 2023, p.2).

Coaching actually pre-dates 1830. Marilyn S. Feinstein in Using Action Methods in Coaching, her chapter in the book Action Explorations notes: "the history of recorded coaching dates back to

ancient China, in which coaching, meant 'journeying together, one inch at a time.' (Feinstein 2019, p. 14)

Many people still think coaching is more aligned to the sports field than the Board Room and that has certainly been the case throughout the twentieth century until 1986 when a couple of respected institutes promoted it as a form of adult development. It has taken some years for its true worth to be seen as anything more than a fad.

Today, coaching is a \$20 billion industry and market trends are suggesting this trajectory will only rise in the coming years. Many of the original players in the field as we know it now, such as Coaches Training Institute, are still in existence with exponential growth predicted in the next ten years.

4. Role Theory Meets Coaching

Integrating role theory into individual coaching sessions offers clients an immediate way to experiment with different ways of working that are both playful and effective.

Jo found herself preparing for working with others by applying the question of which role she wanted to play at the start of that interaction. She understood that she could have greater control over the outcome when she thought consciously and intentionally about it in advance. Understanding that the person or people with whom she would be interacting would take up a role or roles in relationship to the one she chose is what offered her the chance to envision the outcome that was most appropriate for her.

For many, playing a role conjures up an act, a method of pretending that may be inauthentic. Moreno's role theory is, if anything, the opposite.

Every role is a fusion of private and collective elements. A role is composed of two parts – its collective denominator and its individual differential... Role-playing permits the individual some degree of freedom, and role creating which permits the individual a high degree of freedom... (Moreno 1953, p.75)

Without wishing to delve too deeply into the theoretical basis of roles according to Moreno, in my session with Jo, I likened roles to appropriate clothing you choose for a situation. Jo was able to apply this to the variety of scenarios in her job. For example, as a panellist at an important event, a leader networking with her superiors at a conference or a manager delegating to her team, she needed to find or create the role that would elicit the most effective response. Did she have one in her 'wardrobe'/repertoire already?

The roles required were different, even in subtle ways. Using the simple technique of selecting a noun – this is the collective denominator – with one or a few descriptors (adjectives, adverbs) that serve as the individual differentials as mentioned by Moreno above – led her to choose Powerful Communicator as the best role she could play as a panellist. Jo had her choice of words to form the role that she felt most comfortable 'wearing'. Unlike some other theories that designate the role names (Belbin comes to mind first), Morenian role naming is individual, sensory and not so easy in practice. Finding the right version, the descriptive words that accompanied the collective role of Communicator was more challenging for Jo than the actual selection of the role itself.

Furthermore, Jo's Powerful Communicator looks, sounds and feels different from that of the other panellists, in the same way that we wear our clothes uniquely, even if the clothes are identical.

Finding a way to explain the use and impact of these Morenian methods to those who simply don't have the time or the interest in knowing more than the basic theory behind the practice is the task. Images and metaphors, culturally attuned, are good vehicles for clients who wish to apply them in their respective fields but do not need further information about them at that time.

5. Coaching as a Somatic Practice using Morenian Methods

Jo's observation that "the whole role thing requires being present" was something of a surprise. When I began my executive coaching career in 2012, even mentioning mindfulness was considered 'soft' or 'woolly' (in UK parlance) in a majority of corporate environments.

Executive coaching conversations are more complex now. The 'my way or the highway' leader is becoming obsolete and a more collaborative and empathic leadership style is being recognised and even championed .

"We've come to believe that the core capacity needed to access the field of the future is presence. We first thought of presence as being fully conscious and aware in the present moment. Then we began to appreciate presence as deep listening, of being open beyond one's preconceptions and historical ways of making sense. We came to see the importance of letting go of old identities and the need to control and... making choices to serve the evolution of life..." (Senge, P., Scharmer, O., Jaworski, J., Flowers, B. p. 13)

Leadership had become intertwined with control as well as ultimate responsibility. When the buck stops with one person (or at least that is the perception) a culture of blame and mistrust can evolve in a lone leader's head. A barrage of unwelcome emotions may be ignored and separated from the cognitive in decision-making. The rational person is often still considered the 'strongest' in many areas of our lives.

We ask people to be 'strong' by not expressing their emotions, perhaps by suppressing what they're feeling and instead, shifting into action based on their thinking. Being emotional is often seen as weak and less valuable in certain situations. A strong leader may still be seen by some as the one who does not show any feeling and can seem invincible and never makes mistakes. It's not so much the role itself but the perception of what it needs to look like to others.

Jo alludes to this:

"it's like the way that you think a role should be played too is different from who you are and I think that's been another part of this whole thing. Bringing my full self... to the role as opposed to just playing a role of what I think it should be."

It was Jo's full self that responded readily to the invitation to think about her feelings, her behaviour as she perceived it and also, as others might see her. Realising that she could not take enough notes to help her become the Powerful Communicator she initially saw in others and then wanted to be herself prompted her to take away anything that acted as a barrier, in this case, her notepad, between her and the other panellists.

The act of role naming and selection enables Jo to take into consideration these factors as well as an opportunity to sense what is congruent, what fits well and feels right before making a move that may look fine to others but feel wrong internally.

When we first met, I asked Jo what kind of leader she wanted to be and suggested that it might be distinct from that of others who may have managed her in the past. Choosing the sort of leader she wanted to be through role naming was the first step. Inhabiting that role was the next and it is here where Jo was able to understand that in choosing her role, she could affect the outcome.

Choosing a role with intention and consciousness is not purely about how we wish to present ourselves. It is also about how we wish others to treat us and thus the relationships we would like to cultivate. As an example, Jo shared how she went to a conference and met the leader of her business unit. She was deferential at first, showing respect and an acknowledgement of her status compared to his. He was polite.

Upon walking away, she questioned herself and took a few moments to figure out why that felt wrong somehow, like she'd missed an opportunity, when it was the way she had been raised to treat her elders. She decided that this was not the relationship she wanted with a senior leader. She went back, fully 'dressed' as the Confident Practice Leader she is and had a completely different conversation with him. He responded to her as a peer interested in her ideas and she left that interaction feeling that she'd not only made an impression on him, but that she was more of her authentic self.

Jo expressed being present as the pathway to her being able to "tap into" the role of Powerful Communicator that was the key to her success on the panel. She *felt* that the first conversation was wrong before she *thought* it. It was her heightened awareness of her sense of self that sent her back to talk to her senior leader immediately.

So, what exactly does being present mean?

Patsy Rodenburg, the internationally known voice, speech and language teacher, describes presence as "the moments when your energy fully connected you to the world and you received energy back from the connection", a "jolt of energy that flicks a switch in your whole body" and "presence allows experience". (Rodenburg 2007, p.3)

While actors are storytellers, as coaches we are more often than not helping people to move away from their own narrative, their own often heavily rehearsed script. The shift from narrative to what is happening in their holistic selves, in their soma is the desired direction of travel. "When you work with presence, the only thing you're trying to do is help a client be more present with what is happening in them, whatever it is." (Janni 2023, p. 6)

Coaches are not trying to fix or repair clients. We are holding the space and creating the conditions for them to see themselves, sense themselves and simply 'be' rather than rush 'to do' or change.

Presence is a way of being. It can be part of a role description and warming up to it requires a conscious choice. Ways of warming up often include a centring practice that might be described as mindfulness or meditation. It is a somatic clearing to allow room for the client to be fully present themselves and allow their issues to emerge instead of being buried in narrative. John Prendergast describes this as "noticing awareness itself. Not thinking about awareness, but more of a resting back to a sense of spacious openness, quiet attunement, simply being aware, sensing

into the openness, spacious quality, and resting in awareness, perhaps at some point as awareness.” (Prendergast 2023, p. 2)

A core principle of all Morenian practice is to create an environment that permits the creativity of each client to unfold and for them to take away what they need as determined by the contract they agreed to at the outset of the psycho- or sociodrama. A Morenian practitioner enters the space without knowing what will happen as spontaneity is also key to the practice. The work is that of the individual or the group and being sensitive to the energy of the person or group is where the skill lies. In other words, we are being present as defined by both Rodenburg and Janni.

Both coaching and Morenian methods stipulate a contract as the frame that holds the relationship between a coach and a client and against which any progress or scope of work is measured.

This has many names and descriptions depending on the training institution: Coaches Training Institute (CTI) calls it ‘Designing the Alliance’, Julie Whitmore in *The Coaching Manual* refers to it as ‘the context for coaching’ while the Oasis School of Human Relations calls the second stage of the *Seven Stage Model for Effective Working Relationships* “Contracting: developing a shared agreement that requires a thorough exploration of the contexts of both the inner and external worlds of those involved in the work. One of the first suggested questions is simply, ‘What do you want? What do you really want?’” (Tweddle et al. 2011, p.9)

A coaching space framed by Morenian methods offers a breadth of tools alongside theory. Role naming and role taking (in contrast to the more familiar role playing) are those which Jo particularly found useful and able to apply. Another fundamental tool is doubling in which unexpressed thoughts or feelings, perhaps ones that the client feels incapable of saying, are uttered out loud. Doubling is designed to meet the whole, somatic self and offer a perspective outside of the brain, the heart and the gut. Diana Jones in her book, *Leadership Material*, explains:

“When there are finely tuned relationships between coach and client... doubling is possible. The double gives voice to unexpected ‘felt’ experiences. ‘You’ve had a shock’, ‘you misunderstood’, ‘you have been working hard and no one has noticed.’ The double is non-judgmental. Effective doubles follow with, “is that right?” When leaders in distress are accurately doubled, they no longer feel isolated. A bridge has been built so they can make sense of their experience... new insights are possible.” (Jones 2017, p.160)

This is the deep listening of presence. A coach able to name those feelings that she senses in her client can offer a route out of isolation and a connection to the client’s array of resources available that may be hidden or underserved.

Diana Jones observed that, “after working with hundreds of different teams...I discovered many leaders have a blind spot. Astutely aware of their strengths, they were unaware of how they... impact others.” (Jones 2017, p.2) Executive presence is what sets people apart and far from being purely rational leaders who “value thinking, reasoning and facts over all else” (Jones 2017, p.1), a leader with presence brings his/her whole self into their encounters, is defined by using their creative genius to address problems and acknowledges emotions as part of being human and a key to leading successfully.

Nicholas Janni agrees: “Our whole culture has oriented itself toward thinking being the master function. We intellectualize everything. We intellectualize emotions, which most of the time I don’t believe has any value, compared to when we work with actually feeling...” (Janni 2023, p. 3)

Nicholas, who works with CEO's and senior leadership teams worldwide, is a former Associate Fellow at The University of Oxford Saïd Business School and teaches regularly at the IMD (International Institute of Management Development) in Lausanne. He writes in his book, *Leader as Healer*:

"Emotions are the gateway to our deeper humanity. Connecting more consciously with our feeling states allows us a richer, more heartfelt and empathic relationship to life and to leadership. This in turn heightens energy and connectedness, which provide the foundation for higher levels of perception, vision, insight and innovation."

The way we relate to — or, more often, do not relate to — our emotions is one of the biggest sources of fragmentation and disconnectedness in our culture. Yet, this challenge presents a ripe opportunity for change. By facing it, leaders can cross a prime transformational gateway towards bringing deeper presence and coherence to themselves and their organizations." (Janni 2022, p. 17)

Presence as a leadership skill is developing in the corporate world and Morenian practitioners at our best already offer being fully present as a part of our practice. Uncertainty about exactly where the energy is going to go and trusting ourselves as directors to follow that energy in fulfilment of the contract has always been our brief. Perhaps it is the right time to step further into this VUCA (volatility, uncertainty, complexity, and ambiguity) world and share in as many contexts as we can the magic of Moreno.

6. Coaching using the Cultural Atom with Entrepreneurs

I particularly like the exercise that involve placing objects (representing the people) in positions as I saw them how they affect my life professionally. It was an effective way of allowing me to step back and view my network from a different perspective. (Written Evaluation by client, 2022)

AI, an entrepreneur in the UK, describes above his experience of the cultural atom. He has a small business and leads a team that includes young people on apprenticeships. We began with a mapping of the support network surrounding his business using objects. AI was tentative at first though soon he began to have fun and seemed liberated by the technique. He chose particular objects and their placement in the room in relationship to himself, using proximity to demonstrate how helpful he felt they were at that time. He adjusted them too as the exercise unfolded until the entire room was filled.

The next part involved role reversing with the people represented by these objects. Daring to speak from them, particularly his benefactors, was more difficult and took longer. While we had used role reversal in a previous session, it had been for an interaction with him and another person and primarily as a way of seeing the world from their point of view.

Role reversing is useful for empathy concerning a moment with another and is an integral tool of Morenian methods. It involves "physically swap(ping) roles in order to step into the other's position and thus deep(ening) their understanding of the other." (Glossary in Sociodrama 2021, p. 350) It is a reversal of bodies as well as words and cognitive thoughts, emotional and mental states.

Each time he came back to himself at the centre of the atom, he had found new insight. AI used the words of each person when he could, repeating things they had said to him, some of which

he had not quite believed. He was simply unable in certain cases to accept that people wanted to help him because of their faith in his potential and what he had already accomplished. His own limiting beliefs were called into question.

Irina Stefanescu is a practitioner for whom the cultural atom is a passion. She has developed a clear structure in individual and team coaching to deploy it and she succinctly sums up the true power of this method: “When exploring the cultural atom, we talk about roles and relationships, and in doing so we talk about identity and values.” (Stefanescu 2021, p. 236)

Identity and values reach the core of our being which is a central tenet of coaching from presence. We offer the space for a client to pause and consider who they are and how they want to be in the world as well as how they want to be with others. The cultural atom allows the client to imagine how others regard him as well as consider the quality of each of those relationships. It's also a place to explore what those relationships look like now and how they might be improved. Irina describes it as “a progression of the social atom and can be called a ‘role atom’ because it is the social atom plus the roles” (personal communication).

Al had left the cultural atom session thoughtfully, perhaps even somewhat disturbed. I was not aware until I read his evaluation weeks later that I understood how especially effective it had been for him. It inspired more profound questions of himself than the busy life of an entrepreneur normally permits and opened up an appreciation for the quality of the relationships he had forged. This enabled him to think more seriously about the people in his life, both in the present and the future.

Many clients are unaware of the system around them until using a technique such as the cultural atom exercise. They feel more supported through it. Mapping their systems has helped them feel less alone, that their whole worlds and, in Al's case, the fate of a faltering business, relies on them alone.

As coaches, we are not initially aware of what lies underneath a client's narrative. Being conscious that we ask clients to search within themselves for the answers they seek may yield more than they were expecting. Memories, unresolved feelings, often related to loss, as well as limiting beliefs surface at times almost like awkward relatives. We know they're there, we just don't want to see them.

Entrepreneurs may harbour more than others given what we are beginning to understand about their mental health.

Statistics regarding the plight of entrepreneurs' poor mental health are staggering. Key findings from a study conducted by Mental Health UK and iwoca, a small business lender, find:

- 80% reported experiencing symptoms of poor mental health
- The pandemic has made this more acute, with people reporting panic attacks and experiencing symptoms of depression more frequently since the pandemic began
- 86% of female business owners reported experiencing poor mental health, compared to 77% of males
- Despite this, 44% of small business owners have never accessed mental health support

<https://mentalhealth-uk.org/blog/four-in-five-small-business-owners-tell-us-theyre-experiencing-poor-mental-health/8> August 2023)

It does beg the question: is coaching the best form of support for entrepreneurs and others who select coaches instead of therapists? As the profession expands to include emotional states and their impact on behaviour and actions, is it appropriate for coaches to be wandering into territory that was more often considered a therapeutic boundary?

7. Connections and distinctions between coaching and therapy

While there are marked distinctions between coaching and therapy, the area of common ground between them is growing and with it, a considerable amount of confusion. They are both helping professions and offer space for people to consider their behaviour, feelings and actions.

However, it is not in their similarities that the confusion reigns but in the perceived differences that are beginning to become less obvious.

A traditional view is that “Coaching is more collaborative and egalitarian—the coach does not always necessarily know best; it has a prospective approach and does not dwell on the past; it is results-oriented and aims to maximize capacity, not process feelings; it is short term; it is granular in its focus; it is informal, including around issues of session time and location, contact between sessions, self-disclosures by the coach, and dual relationships outside coaching; it is intended for a psychopathology-free clientele who are not seeking help for mental illness or psychoeducation; and finally, it lacks the stigma still attached to psychotherapy.” (Aboujaoude 2020, p. 974)

The traditional approach, however, does not take into account how coaching is evolving. We welcome feelings and sensations and know that we are more effective when we coach holistically. We cannot ignore the past that may be informing the present and affecting the future. It is the manner and way in which we refer to the past that separates us from psychotherapy. Time frames do vary but it is not uncommon to have coaching relationships that last for years.

Psychotherapy is also moving towards less formality too: “despite continuing to defend clear boundaries with patients and to warn against associating with them in other roles besides that of therapist, the therapy field has evolved toward less formality around session time and location and intersession therapist accessibility. This is due, in part, to new digital mental health interventions that allow for more flexible treatment delivery than do traditional models” (Aboujaoude, 2020, p. 974)

While some training for coaches is becoming increasingly sophisticated and drawing more from the world of trauma-informed practices, the field is largely unregulated. The International Coaching Federation (ICF), the European Mentoring and Coaching Council (EMCC) and the Association for Coaching (AC) promote ethical working with safeguarding measures in place. Clients can turn to these professional bodies to report conduct that is not appropriate.

However, there are many coaches who do not belong to professional bodies and thus do not sign up to be held accountable by their Codes of Ethics. Additionally, many who advertise as coaches do not have credentials earned through robust training such as those required by the professional coaching bodies.

This poses a problem for clients who may seek a form of support they feel has less stigma attached to it though they are truly suffering from a mental illness. Elias Aboujaoude is concerned that engaging with a coach in favour of a therapist can be harmful to some people, particularly if

the coach does not understand when a referral to a therapist is necessary. (Aboujaoude 2020, p. 975)

8. Responsible Contracting

Contracting is the first step in developing a relationship with a client in both psychotherapy and coaching. It is a co-created agreement that stipulates the mechanics of the work including the timeframe, number and duration of sessions as well as the scope of the content or the specific topics the client would like to address. The contract is one of the ways a professional can determine when a referral to someone trained in handling that level of trauma or mental illness is necessary for safe and ethical practice.

“I think when you get into serious mental illness, when you’re dealing with severe psychological conditions, such as schizophrenia, bipolar disorder, or chronic depression that has been very difficult to work with, when you get into trauma, you really need specialized training because you can easily activate and re-traumatize a client by going in ill-equipped to deal with it. If you’re dealing with really early attachment issues, where there’s a very unstable sense of individual self or you’re dealing with trauma, either single incident or complex trauma, and you’re not trained to deal with that, it’s best to refer to someone who is.” (Prendergast 2023, p. 20)

John makes a crucial point here: it is the coach’s responsibility to recognise when the scope of the agreed contract has been transgressed. Clients, especially those who have not experienced the generosity of attention and space that coaching can offer, may not be aware they are presenting an issue that is not within the realm of a coaching relationship.

“Sometimes, you may not know that those conditions are there when you initially work with a coaching client, so it’s good to have some general understanding of the territory. When people get very dysregulated and activated and they’re not contained within a session and they need a huge amount of support, that’s a real clue that this is time to refer someone, not necessarily to stop your work, but so they get complementary work with a specialist in the area.” (Prendergast 2023, p. 20)

Once a client has been referred to a specialist, it is crucial to recognise the overlaps that will almost certainly occur. At this point, it is wise to renegotiate the contract in order to reinforce the boundaries of the coaching framework.

9. Conclusion

“Personal change, in sociometric theory, involves the development of new roles and their application in satisfying ways in daily life.” (White 2002, p. 86)

Jo noticed a significant shift that had taken place when she had another request to present at an important panel, only weeks after her successful contribution at the earlier event. While she still felt nervous, she did not feel that there had been some terrible mistake in inviting her. Her imposter, for the moment, was silenced. Jo had added Confident, Gracious Panellist to her wardrobe of roles available.

Perhaps the most important recognition for Jo is that her imposter role is helpful in keeping her ego in check. One of her fears was that she would lose sight of her humility (so apparent to those of us who know her) and become less valuable to the company and the team around her. Therefore, she had no need to 'get rid of' the imposter. Now she heralds the imposter's presence as an indication that a limiting belief is on the horizon, ready to be examined. With the tools she has honed through the coaching experience as well as her continuing self-study, Jo knows she has access to the resources within herself and the means to seek further support if she should need it.

While not a panacea for all ills, Morenian methods are a suite of embodied and creative tools that can be applied in various contexts and circumstances. Consciously allowing presence to meet these methods makes a connection between the growing field of coaching and the expanding number of people who are accessing coaching as a way of developing themselves.

10. Literature

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