

ASTD Golden Gate

Training, Coaching, and Leadership Development

HANDOUT

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In this Handout

- Types and reasons for coaching
- Seven big considerations plus 56 detailed questions to help you with your coaching program
- Return On Investment Backdrop
- Considerations for choosing a coaching firm
- International Coach Federation Core Coaching Competencies, and information about other organizations
- Suggested reading on coaching in organizations
- About us



Types of and Reasons for Coaching

1. **Senior Leadership:** C-level or senior executives (team or individual) get a coach to work on *their* goals
2. **Skill-based:** A person gets a one-on-one coach to master a skill (e.g., presentation / communication)
3. **Performance:** An chronic or sustained underperforming person or team gets a coach to help them improve performance
4. **Intervention:** A person or team with a specific, acute issue gets a coach to intervene and fix that issue
5. **Manager-as-coach:** Strong skill level among managers / leaders to coach their people
6. **Succession:** A high potential / high capacity person gets a coach to prepare them to be a successor
7. **Entitlement / Perq:** Everyone who hits a certain benchmark or level is rewarded with or entitled to a coach for a period of time
8. **New role / on-boarding:** Someone new to a role or new to the company gets a coach for a period of time.
9. (Throughout above types) -- Behavioral: working on a small number of key behavior changes.
Belief-based: looking more deeply at beliefs that underlay feeling, behavior, and results.
Somatic: looking at issues / opportunities with the body and body language.



Coaching Program Considerations

1. How does coaching align with our needs and goals as an organization, and what types of coaching does that suggest?

- a. What problem(s) or opportunities in leveraging our human resources and/or developing of capabilities in our organization shall we address? And;
- b. What makes coaching better than other solutions to address them?
- c. What are our most important business outcomes, ones that would absolutely delight us, from a coaching program?
- d. Given the many types of coaching (e.g., Leadership / executive development, Skill-based, Low-Performance, Intervention, Behavioral / Belief-based / Somatic, Manager-as-coach, Succession, Entitlement, New role / on-boarding,) which ones would align with our highest outcomes?
- e. Should we consider other types of coaching? (e.g., life-coaching / work-life balance / career change / transition)
- f. Do we see a need for individuals, teams, both?
- g. Long-term (one-year plus), medium-term (six months to a year), less?
- h. What do we see as our biggest organizational barriers and drivers to add or change a coaching program, and how can we factor these in to our design?

2. What is our target coachable population?

- a. Given our goals as an organization for our coaching program (see question 1), what does that suggest about our target population?
- b. How does our culture currently view “coaching”/does any groundwork need to be laid?
- c. Do we want to start with a smaller group and build up success stories, and socialize them?
- d. What groups or individuals are most likely to welcome coaching?
- e. What groups or individuals are likely to get the most out of coaching, and return the most value from it back to the organization?
- f. Should certain people be entitled to coaching / and if so, who and why?
- g. Can a manager or leader say “you need to go get a coach” to the employee?



Coaching Program Considerations

3. How shall we administer our program?

- a. Does it make sense (administratively, culturally, and/or due to anticipated size) to create a central coaching administrative function or person?
- b. Shall we have a gatekeeper who approves coaching for eligible clients?
- c. To what extent do we want line areas to do their own thing when it comes to coaching?
- d. Who pays the tab? How shall the cost of coaching be allocated, charged back, or centrally-funded? Does that change if the program is newer/untested, versus well-entrenched in our organization?
- e. Shall we have a matchmaker who evaluates prospective coaches and clients, and pairs them up?
- f. If we want central administration of coaching, does it fit best in the training area?
- g. Shall coaching bios and information be provided on our intranet?
- h. Shall we have periodic (e.g. quarterly or monthly) updates on organizational trends and issues that might affect our coachable population with our coaches?
- i. How do we use coaching outputs to evaluate the program's effectiveness and ROI?

4. Do we use in-house coaches, outside coaches, or a combination thereof?

- a. Will our coachable population warm up to a particular type of coach (in-house / outside) more readily?
- b. Do we have a business need to hire coaches as full time employees or dedicated contractors?
- c. Do we have coaches / coaching skills / experience in house already?
- d. Do our existing partners / service providers, with whom we already have good relationships, offer quality coaching programs?
- e. What confidentiality issues will our population have (associated with internal versus external coaches)?
- f. Do our managers or leaders need to be trained in coaching (or some form thereof) and act as internal coaches?



Coaching Program Considerations

5. How do we vet individual coaches / assess biographies and skills?

- a. What are the types of people, skills, and experience that are MOST likely to create a productive discussion with our target population?
- b. Shall we look for a certification?
- c. Is a training, business, psychology, or O.D. background important to credibility with our client base?
- d. Do we want coaches with higher experience / mileage (some gray hair, for example) to effectively go toe-to-toe with our population?
- e. How high a premium shall we place on the coaches own relevant work or leadership experience?
- f. Shall we look for a minimum number of years of coaching under their belt?
- g. Shall we look for a minimum level of experience in or working with clients in our industry or area of operations?
- h. Shall we consider geography (leads to questions about forms of coaching – face to face versus telephone)?
- i. Shall we ensure diversity in our coach population?
- j. Shall we ask for client references?

6. How do we match coaches to our clients?

- a. Shall we offer clients a number of “possible matches” or just a list of bios, and have them interview and self-select?
- b. Shall we have a matchmaker who narrows down to a few (or one) coach for a client?
- c. Do we want to screen or prep coaches before we put them in contact with the client?
- d. Shall we let prospective coaches and clients do a “chemistry check” to see if there’s good immediate rapport?
- e. Shall we have a formal or informal “on-boarding” process for our coaches before the first client in our organization?



Coaching Program Considerations

7. What format, work products, and evaluations should apply to all coaching engagements?

- a. Does coach do 360-degree evaluation or other assessment to start? If so, interviews, quantitative tool, both?
- b. Does coach always talk to boss first, or is it up to the client?
- c. What are our expectations of what the coach will share / not share with anyone other than the client?
- d. Do we want the coach and client to fill out—at the start of each engagement—a template that covers coaching goals and working agreements? If so, what attributes must be included, and who gets to see it?
- e. Do we want the specific coaching steps to be the same in each engagement?
- f. Do we want engagements to be cost-bound, time-bound, or goal-bound, or some combination thereof?
- g. Do we want the boss to be included in the process, and if so, how?
- h. Do we want a central coaching person to be an outside observer?
- i. Do we want a formal mid-term evaluation for each engagement? If so, what attributes must be included in that? Who would see the completed information?
- j. Do we want a formal ending evaluation for each engagement? If so, what attributes must be included in that? Who we see the completed information?
- k. Once the engagement is over, do we want coach and client to develop an ongoing development plan to help the client continue working on what was started?
- l. If so, what does that look like, and who sees it?



Return on Investment Backdrop

There's very little you can say about ALL coaching engagements or coaching programs in terms of ROI, and part of the equation is always subjective, and provided by the client and/or the client's boss, the better programs measure it. Here are a few helpful points, including the ones I made in your talk this evening, which should be a good start (see also the suggested reading):

- 1. MONEY . . . Significantly enhance ROI / ROE from your existing assets (people) by increasing their capacity to lead / achieve
- 2. FIX A PROBLEM . . . Help solve a problem / correct low-performing beliefs/behaviors with highly impactful people, helping entire organization achieve goals
- 3. FOLLOW ON TO TRAINING: Classroom skills training and on-the-fly experience are well-complimented by coaching, which maximizes training investments.
- 4. RETAIN BEST PEOPLE: Failure to be coached is one of the top three reasons good people leave an organization. —Research by Saratoga Institute and PriceWaterhouseCoopers
- Metrix Global did a 2001 study of executive coaching deployed in a large company: 529% ROI, which went up to 788% when retention was added
- 2002 Research by the Chartered Management Institute and Campaign for Learning in the U.K. (their analog to our "American Management Association") where coaching is quite prevalent:
 - 80% of executives say they think they would benefit from coaching at work
 - Virtually all managers (96%) think coaching should be available to every employee
 - 80% of managers value coaching for generating responsibility on the part of the learner
 - 86% of respondents' organizations have offered coaching at one time or another and coaching is CURRENTLY taking place in over one third (36%) of organizations
 - Respondents feel that coaching achieves the following desired outcomes:
 - * A positive impact on other aspects of participants' lives, both at work and outside the workplace (96%)
 - * A feeling amongst participants of ownership of the issues and the outcomes (85%)
 - * Evidence of learning being put into practice (71%)
 - Readily-quantifiable and positive results, often demonstrated on the company's "bottom-line" over the long term (62%)
 - TOP 4 words associated with COACHING (from a given list) were: Supportive (98%), Empowering (82%), Holistic (80%), Inspirational (77%)



Considerations for Choosing a Coaching Firm

- Have them describe an engagement. What does their typical engagement look like, and how does that match up with our needs / expectations?
- Ask them to provide coach biographies: Do their coaches seem like they are likely to be suitable for our coachable population? (e.g., consider average experience level as coaches)
- Ask them about their experience as a firm working in your industry.
- Ask them about their coaches training as coaches.
- Ask them about their approach to coaching – do all coaches use the same tools, approach, and methods? What are the similarities and differences?
- Ask them about time frames for coaching engagements – do they have a minimum / maximum?
- See how they react to what you’ve designed for a program, and how receptive they are to your needs.
- Ask them about money--what are their fees, and how are they determined?
- Ask them about how coaching is delivered—are their coaches geographically aligned with our needs, or are we more neutral (e.g., we’ll pay for travel / we’ll allow “phone coaching,” etc.)
- How do they handle confidentiality between coach and client?
- What is their firm’s experience in our industry? Are there competitive issues / insider information concerns?



International Coach Federation (IFC) Core Coaching Competencies as of 1/2008

1. MEETING ETHICAL GUIDELINES AND PROFESSIONAL STANDARDS
2. ESTABLISHING THE COACHING AGREEMENT
3. CO-CREATING THE RELATIONSHIP
4. ESTABLISHING TRUST AND INTIMACY WITH THE CLIENT
5. COACHING PRESENCE
6. ACTIVE LISTENING
7. POWERFUL QUESTIONING
8. DIRECT COMMUNICATION
9. CREATING AWARENESS
10. DESIGNING ACTIONS
11. PLANNING AND GOAL SETTING
12. MANAGING PROGRESS AND ACCOUNTABILITY

More Information:

International Coach Federation: www.coachfederation.org

- IFC is the largest membership organization for coaching, accredits training programs, and bestows professional certifications based on experience levels
- Other industry groups include the Professional Coaches and Mentors Association, Professional Business Coaches Association, and World Association of Business Coaches. I'm sure there are others too . . .



Suggested Reading: Coaching in Organizations

I'm not a heavy reader, so I told my fellow alumni (we have a network, you know) from Georgetown Leadership Coaching that I was going to be speaking to you , the Golden Gate chapter of the ASTD, and the topic, and asked: what should I suggest they read?

What	So What?
"Executive Coaching," an anthology edited by Fitzgerald and Berger	"I like the book, which has various articles exploring the issues of coaching in organizations. The first article, by David Coleman, is actually a great general article on coaches."
"The Coaching Organization: A Strategy for Developing Leaders" James M. Hunt	"I'm in the process of developing an internal coaching program and the following book has been recommended to me by someone who just held their first coach training class at Northrop Grumman."
"The Impact of Executive Coaching on Leadership Effectiveness" (a 2006 Australian Study) – www.intentional.com.au	Presents compelling research, some of which is new, including business case
Bersin & Associates case study: "Coaching as a Valuable Means for Developing Leaders"	Presents and analyzes a real-life case
Alan Dobzinski, "The Accountability Factor".	Alan Dobzinski, MCC, provides practical guidance for implementing a coaching culture.
"The Heart of Coaching" by Thomas Crane	"We used the book as the cornerstone of evolving my last companies culture into a coaching culture. The book is geared towards, and for, organizations creating a coaching culture. "



About us

COMPREHENSIVE LEADERSHIP SERVICES . . .

Leadership Unleashed provides executive coaching, management consulting, and other related services to help leaders, professionals, teams, and organizations achieve specific, meaningful, and sustainable results.

The Leadership Unleashed team has a successful record of helping individuals and organizations achieve financial, strategy, sales, marketing, hiring, operations, client service, and technology goals

We are a wide area network of coaches with similar coaching training and our own executive leadership experience.

“We work with leaders, leadership teams, and organizations ready to go beyond where they are today—to achieve goals that are meaningful, fulfilling, and energizing. We stand with you and help you tap into your full potential.” —*David Peck, President, Leadership Unleashed*

Services

- Executive Evaluation
- Executive Coaching
- Team Coaching
- Business Coaching
- Business Effectiveness Review
- Management Consulting
- Enterprise Coaching Service
- Transition Coaching
- Coaching Training for Managers

David Peck, president of Leadership Unleashed, and his team of coaches have worked with executive coaching and management consulting clients at Luxottica Retail, Genentech, L-3 Communications, Expedia, Alza / Johnson & Johnson, U.S. Healthcare Partners, IBM Global Consulting, Merrill Lynch, Fidelity Brokerage, Charles Schwab, Piper Jaffray, and EA Search, among others. He is also on the coaching roster at a variety of firms, including Booz Allen Hamilton. David is also a senior executive coach with Marshall Goldsmith Partners.

Prior to founding Leadership Unleashed, David was a Senior Vice President / Chief Operating Officer at Charles Schwab & Company, where he led the effort to build an outsourcing service from zero to \$21 billion in assets in three years. During his nine year tenure he ran other organizations within Schwab, including a subsidiary software company and a multimillion dollar project management group.

As a staff, then senior consultant, then principal during his years at PriceWaterhouse Consulting in Boston, he developed proposals for and managed a number of large operations, strategy, and technology engagements for large commercial clients. David started his business career in the mailroom of a bank.

He's published articles in BusinessWeek Online, Talent Management Magazine, HR Executive Magazine, et al. His book "Beyond Effective: Practices in Self-aware Leadership" was recently published and will be widely available in February, 2008. He also writes the leadership blog *The Recovering Leader*.