

'Six Stages for Success' @ Exec Coach Brokering

Q. How do you match your Executives with the right Coach?

Choosing executive coaching for your employees can make a significant difference to their performance and the performance of your organisation. However, making sure you have chosen the right coach is essential to the process and finding a good fit between coach, individual and your business will make all the difference to the success of a coaching programme.

A. Follow these 'Six Stages' to achieve a Successful Matching Process.

Stage 1 Communicate with all Parties

Depending on the scale and developmental approach, there will be a number of parties interested directly in the coaching process and its outcomes. Who then are the stakeholders who need to be involved?

Stakeholders to be considered when introducing coaching:

- individual getting the coaching – the executive or coachee
- line manager of the person getting the coaching
- HR representative or appropriate person with an organisational, (e.g. member of cultural / OD / change team)
- coaches, (coach broker, if appropriate)

Stage 2 Establish a Coach Criteria

The organisation needs a set of standard criteria for screening coaches and selecting the best one for their needs. The criteria you should consider when embarking on a coaching programme should include the following elements.

What should be important in making your choice?

Coach Background & Style: "Ethics, Experience & Education"

- Formal coaching qualifications, or alternate qualifications, (remember the coaching profession is not yet regulated, though there are some university accredited qualifications, viz. Postgraduate Certificate/MSc in Businesses Coaching)
- Extent and depth of coaching experience, (for example, 'number of hours' is a good indication of actual face-to-face experience as opposed to overall duration)
- What levels of psychological knowledge or training do they have? (this can indicate the career path of each coach, e.g. Trainer, Counsellor, Change Agent, Psychotherapist, General Manager, Human Resource Consultant)
- Members of any professional bodies, (this may include British Psychological Society, National Council for Psychotherapists, Association of Coaching)
- Professional code and quality standards which are followed
- Frequency of coaching supervision? Typically this is expressed in ratio format, for example 1:12, 1 supervision session to every 12 coaching sessions.
- Professional indemnity and liability insurance

What should be important to make a success?

Coach Role & Fit: "Culture, Communication & Contracting"

- ✓ ability to appreciate organisational culture, dynamics and change management, (behavioural change does not happen in a vacuum it is influenced and influences those people around the executive - a coach with this broader and systemic appreciation will add more value)
- ✓ the coach having the capability to role model coaching as a behaviour, (as well as the executive working through particular areas they will also be able to develop their coaching skills which will benefit their team)
- ✓ working within clearly defined boundaries of confidentiality, (if the executive discloses that he/she is in a position which may be detrimental to themselves and the company how should the coach deal with this information, e.g. cocaine habit of a merchant banker)
- ✓ working to specific and measurable milestones which are monitored, in some instances it is possible to retrofit evaluation measures, however for maximum return and credibility to the Board, (or the sponsor of the coaching programme), clear, proactive metrics are essential.
- ✓ Contracting with the coach to clarify cost, (fee structures are typically an overall sum agreed for a coaching package which may include X face-to-face sessions with Y telephone/email support and Z de-briefing meetings with HR/Line Manager as appropriate, it is also good to ensure a provision for cancellations).
- ✓ Establishing a two – way relationship with the coach so that the organisation can be challenged by the coach if deemed for the overall good of the business. For example coaching should be not be used as a disguise for an exit strategy tool.

What should be less important to your decision?

- ☒ Do they have experience coaching in a similar organisation to your own? Do not confuse mentors with coaches. A mentor has knowledge of the industry or role and provides advice based on their work experiences. A coach is qualified in dealing with behavioural change and outcomes, irrespective of the organisational sector. They will also be able to 'read' the culture of the organisation within a very short space of time.
- ☒ Has the Coach ever held an Executive position? Face validity can be an important perception for some executives. The physical look of the coach can influence decisions. Does the executive 'believe' that a younger looking coach with no relevant sector experience is in a position to work with them? This can become a mindset challenge. When establishing the coaching programme there are a number of ways you can 'set the scene'. For example; providing examples of younger sports coaches working with successful athletes, Harvard/Business journal articles endorsing the diversity of working with coaches who have different perspectives.
- ☒ Should the coach be male or female? A lot of our clients ask us about gender differences. Our advice is to ask the executive if they have a preference and why? You will often find that this opens up a good conversation about their expectations and their coaching needs.

Stage 3 Select your preferred 'Matching Model'

This is a key part of the process and could mean the difference between the success and failure of a coaching programme. Bear in mind that once an executive has had a 'mismatched' experience of coaching; it requires significant influence and effort to alter that mindset. This negative reaction can also extend to how the overall programme is received.

There are several models of matching coach to individual executives, each with advantages and disadvantages, the main models used in the UK are outlined below:

Questionnaire Model:

A predetermined online questionnaire. This will automatically ask questions about personal style, outcomes, personality and other needs and make a match of coach and executive based upon this information.

Advantages: Coaches have already been filtered, it's quick; it narrows down who the coaches meet; allows executives to choose a coach based on their outcomes and style; means executives won't just choose a coach based on how similar they are to themselves.

Disadvantages: Model is impersonal; it is also less flexible than one-to-one interviews; filtering mechanism might not be sufficiently rigorous; approach may detract from the credibility of the coaching programme.

Database Model:

The executives involved will choose a coach based on the coach biographies available on the database.

Advantages: Cuts out the middlemen and saves on cost. Executive feels that they have direct control over the matching process. A time effective and transparent selection model.

Disadvantages: The decision is made without rigorous assessment; often people choose a coach who is like them and is therefore less able to offer a diversity of style and experience. You compare and contrast from a limited pool rather than establishing what the executive needs are and making a suitable match. The selection process then becomes focussed on the coach rather than driven by the needs of the executive.

Broker Model:

This can either be someone within your organisation or external party, who interviews the coaches and individuals and assesses who would be best for the individual and then puts forward the proposed coach(es).

Advantages: A more rigorous assessment; organisational commitment and credibility to the intervention; executive more likely to derive maximum benefit from programme; increased reputation and face validity of the programme; greater accountability for results through Broker, executives may be more 'open' with an independent person rather than an internal member of staff, broker is skilled in effective matching process based on behavioural outcomes desired, broker is familiar with Coaching profession and standards expected. The HR representative establishes a relationship with one broker as opposed to a number of different coaches, (this achieves consistency and quality control – no 'rogue' coaches).

Disadvantages: You have to invest time and money in the Broker. You may feel you have less direct control over the intervention as there is another person overseeing the intervention. Not as cost effective if you only have 1 or 2 executives being coached at any one time.

Additional Benefits: We have talked in detail about the coaching fit for coach and individual. However, a much overlooked aspect of the coach matching is organisational fit and congruence. Each coach may have their own working style depending on their training; e.g. person-centred, cognitive, gestalt, psychodynamic, integrative etc... Achieving a common platform for your 'Coaching Methodology' is a crucial role that the Broker also plays. They can understand each 'frame of reference' and align it with the working style of your organisation and executives.

This synthesise of a universal approach can also assist greatly if the executive decides to introduce team coaching. A Broker can also ensure sustainability of return, by working in conjunction with the HR representative to align the coaching programme with other behavioural change interventions. Coaching will provide a significantly stronger return on investment if it is not viewed as a stand-alone product.

Examples of Models which are less effective may include:**Show & Tell Model:**

Coach pitches him or herself in a presentation to a panel audience: The skills that make a good presenter are very different to those that make a good coach. The core competency set you are looking for in a coach is unlikely to focus on presentation skills.

Chat & Choose Model:

Coaches and clients meet in a social or group environment: Too many dynamics come into play that should be irrelevant, for example, people are drawn to those that look like them or who they find compatible. "People Like People Like Them". In most instances, this Model may produce a cosy match, (albeit unconsciously) rather than a constructive match.

Stage 4 Integrate the Coach

Each of the stakeholders mentioned earlier need to be clear on their respective roles and boundaries. Performance Coaching International can assist indirectly in this process by supporting HR or directly by providing a Broker.

a) **Executive Briefing:** This is a half hour meeting between the HR/Broker and the executive. The purpose of the briefing is to clarify the ground rules before the coaching intervention commences.

Topics discussed may include;

- What will be treated in confidence?
- What and how will and coaching 'themes' be shared with the organisation?
- Will the executive be able to discuss personal issues or is the focus purely professional?
- What are the contingency measures if the executive does not like the coach?
- How will the coach(ing) be reviewed and evaluated?
- How will the progress of the executive be reviewed and evaluated?
- What should the executive share with their team and their line manager about the coaching sessions?

b) **Chemistry Meeting:** This is a half hour meeting between the proposed coach and the client and can be face-to-face or by telephone. Preferably the chemistry meeting should be in person because over 90% of what we communicate is on an unconscious level. This way the individual executive can make an informed decision about their coach suitability.

c) **Line Manager Meeting:** This will allow the coach and line manager to agree outcomes based on business needs. It is encouraged that the Executive being coached also attends the session to ensure complete clarity throughout the process. The meeting also allows tangible measures to be put in place to monitor progress. In some instances the Line Manager may request quarterly updates from the Coach.

This may be conducted over the telephone or could be in the form of a written report which is shared via the Human Resource Department. However, it is strongly encouraged that all communication remains transparent within the confines of the confidentiality clause. One preferred option would be to encourage the executive to update their Line Manager on their progress, therefore strengthening this internal relationship.

d) **HR Rep and Coach/ Broker Meeting:** This meeting may cover evaluation, to agree interim and end of programme evaluation measures. This may typically be some form of questionnaire asking the executives team and/or peer group to provide feedback. Over a 6 month coaching intervention, the feedback may be evaluated at month 0, (before first session) month 3, (interim), month 6, (end of programme) and month 9, (follow up).

This meeting may also cover practicalities and contingency measures. What happens if a Coach becomes ill? What happens if an executive clashes with a coach? What happens if an executive cancels the session at short notice? Who will organise the administration of the sessions?

Stage 5 Establish a Coaching Panel

All the coaches you bring into your organisation should meet to offer each other and you feedback about progress with their executives and any emergent organisational themes. This is a vital process in terms of raising standards and awareness. These debriefing meetings should be factored in at the contracting stage. These 'themes' can provide invaluable and insightful information about your organisation. Conversely, this is also an opportunity to share with the coaches any organisational changes which are taking place. This ensures the coaches are aligned with the organisational objectives and can facilitate 'secondary change', (i.e. the ability to relate the executive's behavioural change within the context of overall organisational change).

Stage 6 Maximise your Output from Coaching

The HR Rep will be in a position to distil the coaching 'themes' and look to identify any 'gap area'. For example it may become apparent that there is a perception that the organisational culture discourages risk-taking and this is impacting on speed to market for new product launches. In this example it may be possible to dovetail competency gaps into any leadership & development programmes within the organisation.

Congratulations

In following, these 'Six Stages' you have successfully implemented your first Coach Matching Process! We would love to hear your views and experiences, if you have any additional suggestions please let us know and we'll add them to this article.
