

The Ultimate Guide to Selecting and Getting the Best from External Coaches



Introduction

I have worked as an executive, leadership and team coach since 1998. During that time, I have spent 1000's of hours and 1000's of pounds on my own professional development.

Yet I have never been asked by a client (the person receiving coaching) or the sponsor (who is commissioning the coaching) about my credentials, experience, approach, insurance, or supervision arrangements.

There could be numerous reasons for this, but I find it alarming. Anyone can call themselves a coach. Therapists are now coaches, trainers are coaches, consultants are coaches, business mentors are coaches, sales people are coaches.... It is said to be the fastest growing "profession" in the world and it remains totally unregulated.

The fastest growing "profession" in the world and it's unregulated.

So how do clients and sponsors go about assessing and selecting their coaching services? The main reason I wanted to write this report for you is to:

- Help you buy the coaching service you really need.
- Ensure a good fit for your business and the recipients of the coaching.
- Reduce the risks of throwing good money into coaching that doesn't produce the results you expect.

Individual leaders often come across a coach, or someone recommends a coach to them, and they immediately seek approval to go ahead with coaching.

That's not a robust or cohesive way to introduce coaching into the business. I have conversations with prospects and clients who tell me they have external coaches working within their business and they aren't clear on the goals for the coaching, where they are focusing the work, how the results are being measured and whether all these align with the original business need for the coaching.

I have even come across businesses that sign off six sessions of coaching for their leaders; that person contacts the coach and off they go! No contact between the coach and the client organisation. No involvement of the coaching sponsor or line manager from the beginning to the end of the coaching contract. I can't imagine another business expense that could be so lacking in rigour.

The usual reason given is the confidential nature of coaching, meaning that the sponsors can pay huge amounts of money for coaching and have no real idea what they have bought, or how effective it is. It doesn't have to be like that and it shouldn't be.

The most common scenario that leads me to say "thanks but no thanks" to a potential coaching assignment, is where the line manager has decided that the person should not be in the role, but rather than grasping the nettle and starting performance management, they hope I will take responsibility and "assess" the person as a poor performer, or provide the evidence to demonstrate that in spite of coaching support, the person is still not up to standard.

Another variation on this theme is that the line manager is not prepared to give specific feedback to the client about what they are doing or not doing that needs to change.

**If there is potential for a hidden agenda at play,
coaching should not be pursued.**

Where do you start? I have outlined the main areas to consider and given you information and questions to ask yourself or your prospective coach relating to each.

Is coaching the best approach for this person or issue?

Let's start by looking at the main developmental approaches you can choose from to deliver the most appropriate support.

Approach	Description	Tips
Counselling	This process is usually remedial. It often focuses on resolving deep rooted emotional issues and aims to help the person become fully functional again. It focuses largely on the past and how it impacts on the person today.	If you suspect this person is suffering from depression or has other mental health problems, encourage them to seek help via their own GP or signpost them to other sources of help that may exist within your organisation.
Mentoring	A way of passing on knowledge, skills and experiences to others by someone who is usually older, more experienced and with specific expertise. "A career friend,	If the person needs someone to support them in preparing for a bigger role.
Training	The agenda and objectives are usually agreed between the provider and the client organisation. Individual input into the agenda is restricted. Training enables what can be large groups of people to address or learn about common issues and themes. It is usually focused on skills building and often conducted away from the place of work.	If skills training is required either by an individual or group, then one to one or group training is likely to be the most appropriate.
Consulting	This is an expert role. Someone is employed for their knowledge and expertise. They carry out an evaluation and submit recommendations.	If this relates to a complex business issue, and requires specialist, external knowledge then a consultant is the way to go.
Coaching	A way of facilitating a person's learning, development or performance. Aim is to help people find their own solutions, develop their skills, and change their behaviours or attitudes.	Coaching can be totally bespoke to the individual or group. Effective coaching addresses the motives, drivers, values, attitudes and behaviours that help or hinder progress. It can be effective for high performers and underperformers.

So, having considered the options so far, checked that the line manager is clear about their role and responsibilities, and providing clear feedback to the client, you have decided coaching is appropriate.... now what?

Best Approach? – Checklist

Is coaching more appropriate for this issue than mentoring, counselling, training or consultancy?

If there is a development need to be addressed, has the potential coaching client been given clear performance feedback and behavioural objectives?

Is this person ready for coaching?

During your conversation with your leader or leaders about receiving coaching, it is useful to check that they:

- Know what to expect of coaching and view it positively.
- Can see a gap between where they are now and where they need or want to be.
- Are ready to commit time and energy to the coaching sessions, and to the work in-between sessions.
- Are capable of honest self-assessment and can take candid feedback.
- Are prepared to trust a coach enough to talk openly, even when it feels uncomfortable.
- Are willing to try new approaches and make any necessary behavioural changes.
- Recognise that the benefit they get from coaching will depend on the level of investment they are prepared to make.

How do you select the most appropriate coach?

The 6th Ridler Report “Strategic Trends in the Use of Coaching,” found that organisations who use external coaches did so because they bring with them a diverse experience of coaching senior leaders in a range of roles, in a variety of different businesses and professional practices. They are more objective and impartial about the individuals they are coaching as they have no prior knowledge of them. Executive Directors are more ready to share confidential business and personal information with an external specialist than with an internal coach who could bring vested interests into the coaching relationship.

The organisations surveyed, believe that an external coach would better enable senior leaders to bring their vulnerability into the coaching and to be completely honest about their strengths, and development areas.

You have decided to commission external executive coaching perhaps for the reasons listed above. Perhaps for different reasons.

How will you know if the coaches you are considering are effective, professional and a good fit for your business?

I am guessing you are reading this report because you want a more robust approach to selecting a coach rather than turning to the coach you happen to know or relying solely on your gut instinct.

There are criteria you can use to reduce the thousands of potential executive coaches that could be beating a path to your door and feel confident that you have exercised due diligence.

Qualifications. They are not a guarantee of effective coaching but given there are so many people calling themselves coaches it can dramatically reduce the number of candidates.

State the qualifications required.

Would you ask for a Master's Degree in Coaching or related field or a Post-Graduate Diploma in Coaching?

Credentials and accreditations. Coaching is an unregulated industry. Look for coaches who graduated from programmes that are credentialed by the:

- International Coach Federation (ICF),
- Association of Coaching (AOC)
- Academy of Executive Coaching (AoEC)
- European Mentoring and Coaching Council (EMCC).

Although you may see lots of other impressive sounding credentials, using these four as a benchmark is a safer option. I know of one university that offered a "Professional Coach" credential after a free weekend course!

The International Coach Federation in particular ensures that coaches complete a certain amount, and specific quality, of training and development. It requires their coaches to pass exams and abide by a strict code of ethics. To maintain their credentials, the coaches are required to provide evidence of their continued professional development.

You can easily vet credentials by searching online to find out if the coach went to an ICF-accredited coaching school.

According to the Ridler Report, 68% of organisations who use coaching require their external coaches to have individual accreditation with a professional coaching body. I believe this percentage would be significantly lower in medium sized business, with tighter budgets and smaller L&D functions, rather than large corporates.

Supervision. All professional coaches should have regular supervision from a trained and qualified supervisor. This is to ensure the coach is working as effectively as possible by highlighting unconscious bias, offering support and challenge around their thinking, assumptions, and coaching strategies.

Ask the prospective coach what specifically, their supervision arrangements are.

Coaching Process. Skilled coaches will be able to walk you through their process.

That process should include helping the client define their core challenges, identify where they are now and where they want to be, and how they will support the client to transfer their new skills and behaviours into day to day life. If they are evasive, saying it's "hard to quantify" or if they are all exclamation marks but short on practicality e.g. "people love it!" "It's life changing!" chances are, this person is not the coach for you.

Getting feedback. As well as having 3 or 4-way meetings between the coach, client, sponsor and line manager (if different from the sponsor) to clarify development needs, align coaching objectives and review progress, most good coaches gather feedback from those who work with the client to establish how the client is seen by them. The coach will then work with the client to identify the areas of focus that would have the biggest impact on those perceptions. We all have blind-spots and research suggests that self- evaluation is the least accurate of all evaluation, so feedback from others is extremely helpful.

Confidentiality. This is massively important. Good coaches make very clear agreements with everyone involved about what will be shared and what will be held in confidence and they keep those agreements. If a coach is unclear about the boundaries of confidentiality, or you learn that they have shared confidential information, you should end the engagement immediately.

Right Coach? – Key Questions

- What are your specific coaching qualifications and what did they entail?
- What coaching credentials or accreditations do you hold?
- Which professional coaching body do you belong to?
- What are your supervision arrangements?
- What is your coaching process? Give me a walkthrough.

- Does the process include gathering feedback on the client?
- How do you do this?
- What is confidential to the coaching process and what is shared?

Should you use individual coaches or a coaching company?

When I work with corporate clients it is as a member of a team of coaches under the umbrella of a large coaching company. This can bring many important advantages:

- The whole coaching team have been through a rigorous selection process.
- We have had the same familiarisation process to get us up to speed with the culture, strategic direction and leadership challenges of the client organisation
- We know each other well and are aligned in our approach whilst also offering diversity of styles, personalities and experience. We are able respond flexibly in the moment when coaching.
- Arguably the most beneficial of all these advantages is that we are well placed to pick up and collate organisational trends and issues that are emerging in the coaching sessions and collate them into anonymised feedback for the Senior Leadership Team. Information that they need to know about and can act upon.

Most of my own work is with medium sized businesses and the picture is quite different. They are much more likely to be using individual freelance coaches who are operating independently, at different levels, and in different pockets of the business. This may be due to smaller budgets (those large corporate coaching companies come with a very high price tag) or it may happen more by accident than design.

I don't believe it has to be an either / or decision. If you have several potential coaching clients in your business, give some consideration to having a choice of diverse coaches to offer your people, and have someone (a lead coach) who can ensure alignment of processes, practices and standards. They can be the person who gathers feedback from the coaches on emerging themes and communicate them to you and your Senior Leadership Team.

Matching Coach and Client

I don't know any coaches that don't offer free initial "chemistry" sessions to help both the coach and the client decide if the coaching relationship is likely to be a good fit. Most coaches will encourage the client to have a session like this with two or three coaches before making their decision.

So far so good. A question I have, and to which I don't have the answer, is,

"Is it always best for the client to select their own coach?"

The Ridler Report sheds light on the perceptions and experiences of those organisations who use coaching.

In favour of chemistry meetings:

- Clients possess a good sense of which coach will be best for them. 85% of the organisations surveyed believe that chemistry meetings enable clients to form a "strong and reliable sense of which coach will be able to help them most."
- Giving clients control over their choice of coach gives them a sense of ownership which is likely to increase their engagement and the value they get from coaching.
- Senior executives often like to be in control of their own destiny and may not like being told which coach they will work with.

Against chemistry meetings:

Anecdotally, some organisations started out believing offering chemistry sessions was the right thing to do, then changed their minds. The reasons given include:

- Meeting with the client to assess their coaching needs gave the sponsor a good understanding of their requirements. Enough for the sponsor to make a good choice of coach.
- If left to their own devices, clients tend to choose a coach who seems impressive on the surface. Some coaches who are strong on extrovert energy and charisma tend to get chosen more often because of their initial presentation. However, their superior ability to win coaching assignments is not always positively correlated with their coaching ability.
- Clients may unconsciously resist engaging with the most challenging coaches.

- Clients frequently find it hard to choose between coaches after they have met them in a chemistry meeting, especially where the organisation is putting forward two or more experienced high-quality coaches
- Where no chemistry meetings are offered, organisations find it is very rare for the coach that is put forward to be rejected by the client.

Whether to offer chemistry sessions to your leaders or not, is certainly worth considering.

Managing expectations

Despite the huge growth of coaching during the last two decades most clients come to coaching without a clear idea of what to expect. The time it takes to get the coaching up and running effectively can be shortened if the client does some pre-work.

Ask the coach what they send out to the client before the first coaching session. This could include a welcome pack, an introduction to coaching, the coaching agreement or contract, roles and responsibilities, cancellation policy etc.

Measuring results

The most commonly used measure of progress is the Return on Expectations (ROE). This means measuring progress against the originally specified outcomes as reported in the 3-way meeting between the coach, client and sponsor. Organisations place a high value on ROE. The Ridler Report found that 74% of organisations rated this measure as “valuable or “very valuable.”

An even higher percentage, 87% in fact, rated comparative 360 ratings pre and post coaching as “valuable” or “very valuable” but only 26% of those organisations use that measure. This is largely due to the time it takes for respondents to complete the feedback and the time it takes to compile the findings.

When it comes to demonstrating the financial Return on Investment (ROI) of coaching, it is both important and difficult.

Some would argue that just because evaluating ROI is hard, it doesn't mean it shouldn't be attempted. Increasingly, there is training available to help coaches assess the value

and ROI of coaching. However, each client organisation would need to decide on how much time and energy they are prepared to spend on measuring ROI and whether the results are accurate and useful enough to justify the input.

Whatever approach you take to measuring the value of coaching, robust qualitative and quantitative data that demonstrates value is vital to support future investment in coaching and to protect coaching budgets when times are hard and coaching inevitably comes under threat.

Ask the coach about their experience and ability to help you to gather and evaluate the data and present it back to the business.

Conclusion

The coaching industry remains a huge growth area and remains unregulated.

If you are in a medium sized business, it may be hard to cut through all the rhetoric, hype and often unsubstantiated claims of what coaching can achieve and why the person selling their services to you today, is the best coach you could find.

I hope this has helped you think about how to select external coaches, what would work well for you and your business, and what you need to look out for.

If you have found the ideas in this report useful and would like to discuss them further, perhaps with a view to working together to address some of these issues, do give me a call on **07971 793 558** or email me on juliekay@JKLD.co.uk



About the Author

Julie Kay is an executive and team coach specialising in helping professional and technical experts to become outstanding leaders who improve and maintain high performance.

She typically works with rapidly growing businesses, often in science, technology, engineering or mathematics. Businesses who need their leaders and managers to get to grips with performance improvement challenges and develop committed engaged employees who fully contribute to their ambitious business goals.

Her clients are looking for innovative, effective and sustainable leadership development solutions that improve both the current performance and the longer-term health of their business.

If you have a responsibility for, and commitment to, supporting and developing your leaders and their teams, Julie will work with your leaders to develop authority, presence and impact, create high performing teams and develop strong, trusting relationships with wider stakeholders.

Please call her on **07971 793 558** or email juliekay@jkld.co.uk for an initial discussion of your needs?

Julie's Qualifications and Credentials

- **Post Graduate Diploma in Executive Coaching** (*Ashridge Business School*)
- **Accredited "Ashridge Executive Coach"** (*Ashridge Business School*)
- **Professional Certified Coach** (*International Coach Federation*) 2000+ coaching hours
- **M.Ed. in Training and Development** (*Sheffield University*)
- **Team Accelerator Coaching Programme – Graduate**
- **Certified NLP Practitioner**
- **Certified Time-Line Therapy Practitioner**
- **Graduate of Coach Training Programme** (*Coach University – Colorado*)
- **Diploma in Management** (*Portsmouth University*)
- **Diploma in Stress Management** (*Centre for Stress Management – London*)



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