Executive Coaching Overview

What is Coaching

Coaching is a process that helps the participant (called the coaching counterpart) to become the kind of person that they are capable of being, either at work or in their wider life.

The coach uses conversation to assist, support and encourage the coaching counterpart to access answers to key questions that will reveal deeper insights and lead to professional and personal growth.

This coaching approach is based on the programs of the Institute of Executive Coaching, Positive Psychology and Solution Focused Coaching. It also draws on understandings from the fields of Cognitive Behaviour Therapy and Neuro-linguistic Programming.

The coach uses tools and techniques to reach two broad outcomes:

1. Improvement in the counterpart's self-awareness; and
2. Reflection (and action) based on this increased self-awareness.

Who should Undertake Executive Coaching

Executives undertake coaching to improve some aspect of their work as a director or manager. In the executive space, coaching is recommended for directors and managers who a seeking a confidential and effective intervention to grow professionally, either in their current role or for the future.

Common Coaching Areas

- Influencing skills
- Interpersonal and communication skills
- Effective team management and participation
- Supervision of staff performance
- Time management
- Career planning
- Coming up to speed in a new management role
- Balancing work and life
- Staff development and dealing with conflict
- Identifying and addressing gaps and obstacles
- Strategic thinking and business planning

Confirmation of Engagement

To confirm the new coaching engagement the client's delegated officer signs a confirmation of engagement, (a draft copy of which is attached). This document outlines what you have agreed with the coach. The number of sessions, the fee, cancellation charges, invoicing terms are all be outlined in this document. This document forms the executive coaching contract.

The signed Confirmation of Engagement should be faxed back to me on 9804 6686.

Initial Coaching "Meet and Greet"

It is usual for the coach to meet the prospective coaching counterpart to find out whether or not there is a "fit" between them. This is often a casual meeting, even a coffee at the local coffee shop. It does not consist of "coaching" *per se*, but provides information about coaching, how the coach works and what benefits others have gained from coaching. These meet and greets are short – around half an hour. If there is no "meet and greet" before starting a coaching session, the issues will be covered in the first coaching session.

Meeting with the Organisational Sponsor

Because the coach is usually hired by the organisation and not the coaching counterpart, there is a three-way relationship involved. An effective way of managing this three-way relationship is to have an initial meeting between the coach, the coaching counterpart and the client's representative. This representative can be the HR Director or the coaching counterpart's supervisor.

This three-way meeting is useful to clarify expectations, and is important to ensure success. This three-way helps to ensure alignment between the development objectives of the individual and those of the organisation. It also provides an opportunity to garner support from the supervisor for the development journey of the individual.

This initial three-way meeting forms the first 20-30 minutes of the first session.

Types of questions that may be asked in the three-way meeting:

To the coaching counterpart:

- What are the areas you have identified to work on in our coaching assignment?

To the supervisor:

- How does that fit with the objectives of the team and the organisation?
- What are the particular challenges in your team/organisation?
- What particular strengths can the coaching counterpart leverage from to build success?
- What are your organisation's expectations in relation to reporting back to you on the coaching engagement?

To both:

What are the sorts of behaviours and actions that you think people will observe if the coaching achieves its objectives?

Is there anything in particular that we should all be mindful of in this process?

The First Coaching Session

Unless covered in the "meet and greet" the first meeting includes the following:

- The nature of the coaching encounter including the philosophy, methods and tools to be used;
- The commitment to change and action on part of the coaching counterpart, including tasks assigned between sessions;
- The coach's commitment to the process and their professionalism;
- The professional ethics of the coaching encounter (respect, confidentiality about content, coach feedback, transparency, sponsor reporting procedures, the nature of the relationship as a guiding and learning relationship);
- Communicate the structure of the engagement: the time available (e.g. seven x one hour sessions or equivalent 90 minute sessions) over what period, the mid-point review and final wrap-up;
- Discuss pacing (e.g. three sessions a fortnight apart, followed by a review, any pauses that may be necessary and possibly more time between sessions in the second half of the engagement);
- Decide on location for coaching sessions (a private space out of the coaching counterpart's usual environment is preferable); and
- Discussion of a coaching journal.

Initial Questions

The following provide some ideas for the kinds of questions you may be asked at that first meeting, with the objective of getting to know you, and beginning to establish a relationship.

- Please tell me a little about yourself...
- What is your role within the organisation...what challenges do you have?
- What are your aspirations?
- What do you already know about executive coaching?
- Have you had any coaching before? If so, what was your experience of it?
- What would you like to ask me about coaching?

The first session provides the opportunity to clearly identify and prioritise the development objectives. (Tools such as "The Circle of Concern" and Job Analysis may be used to identify and prioritize coaching goals).

The first session then begins with the GROW model, making sure that the coaching goal that is being worked on is part of the bigger picture and is at the same time specific enough to produce an action.

At the end of each session, the coach and coaching counterpart spend a few minutes asking "Reflecting on the Experience questions" such as:

- What stood out for you?
- What is your main take-away?
- What worked well, and what could we have changed?

Assessment of the Coaching Counterpart

In many coaching engagements it is appropriate to arrange for assessment of the coaching counterpart's preferred approach to leadership, interpersonal relationships and developmental needs. A variety of tools are used, and may include VIA Signature Strengths, DISC Analysis, Team Management Profile, Big Five Personality Assessment, 360° Feedback, and similar approaches. The information obtained from these assessments is used to assist the coaching counterpart to increase their self-awareness within the confidentiality of the coaching space. Results are not shared with any other party without the approval of the coaching counterpart.

Assessments are only undertaken if they will assist and support the attainment of the coaching counterpart's goals.

With the exception of the Team Management Profile, there is no third party fee associated with these assessments. Collection of data as part of the 360° Feedback process may form part of the billable hours for the coaching engagement. Third party fees for the Team Management Profile will be charged at cost.

Other Tools

The coach will use a variety of other techniques and tools to deepen understanding and to build self-awareness and reflection for the coaching counterpart. The selection of tools and techniques will depend on the situation but may include any of the following:

- GROW Model
- Circle of Concern
- Inference Chaining
- Integral Model
- Life Narrative
- Motivation Imagery
- Moving above the line
- Neurological levels of perception
- Rapid Case Conceptualisation

- Staying Focused (or Goal) Imagery
- Three chair activity (Perspectives or perceptual positions)
- Time perspective
- Upward laddering

Subsequent Coaching Sessions

Each subsequent session will involve reflecting on the success or insights from previous discussions and actions carried out, and how they link with your wider aspirations and specific goal for the previous session.

If there is anything significant that has come up to impact the coaching assignment this will also be considered.

Where to from here in the bigger picture? Goal for the day.....then GROW.....and reflecting on the experience questions.

Mid Point Review

A mid-point review provides the opportunity to identify progress made, challenges encountered and remaining objectives. It is usually conducted between the coach and coaching counterpart (but can include the supervisor if agreed).

Structure of the mid point review:

- Explain the purpose of the mid point review, i.e. that it is an opportunity to check in on the process so far. Ask the coaching counterpart to give a brief overview of their experience so far, the changes that they feel they have make, including successes and “failed” attempts.
- Ask the sponsor for their objectives and insights that build on the process so far and provide support and challenge for the next three sessions.

Concluding Session

The purpose of the last session is to ensure that any changes or developments or progress made is celebrated, sustained and developed further. The general wrap-up may include questions such as:

- What have been the most significant points in our coaching?
- In what ways do you think/feel you have benefited?
- What are others saying about any changes? Who would not be surprised about how well you have gone? What do you think I would say about these benefits?
- What will support you maintaining your new direction? What is the next most important step for you?
- Who can most support you? How will they know you have continued this journey?

Reporting Back

Depending what is agreed, a written report is usually provided by the coach to the coaching counterpart’s supervisor. This report is general in nature and addresses the goals that have been addressed, the extent to which these goals have been achieved during the coaching period and any ongoing support that may assist the coaching counterpart’s professional growth. The report is considered and agreed by the coaching counterpart before it is forwarded to the supervisor.

Follow-on Contact

Some coaching counterparts choose to keep in touch with their coach after the engagement is over. This welcomed and falls outside the coaching contract. Many do a follow up call or email sometime later to ask a question or share with the coach how they are getting on. It’s up to you.

Confirmation of Coaching Engagement

Dated (Insert date)

(Insert client's name and address)

I would like to confirm and provide the following details regarding the executive coaching program.

Coaching Counterpart	*Coaching counterpart's name*
Start Date	*Insert date*
Location	*Insert location where coaching will be delivered, or phone coaching.*
Third Party Costs	Any out of pocket expenses or third party costs will be quoted in advance and charged at cost.
Coach	*Insert coach's name. E.g. Duncan Sutherland JP*
Number of Sessions	7 hours (420 minutes as 60 or 90-minute sessions. Minimum 5 sessions)
Professional Fee	$2,500 (inclusive of GST)
Cancellation Policy	A minimum of 48 hours notice is required to re-schedule or cancel a session otherwise the 1-hour coaching fee will be charged.
Payment Terms	The first 50% will be invoiced upon confirmation of the engagement with the remaining 50% invoiced at the mid-point of the coaching program. Payment terms are 14 calendar days.

If you have any questions regarding the above, please contact me on 0431 452 862 or dasuther@gmail.com .

To confirm your agreement to the above, please sign below and return a copy of this document by fax to 9804 6686.

Proposed:

Signed: Duncan Sutherland JP

Executive Coach

Agreed:

Signed: Client's delegated representative

Date: