

SUMMARY FINDINGS
International Executive Coaching Summit III

The Profession, The Practice, The Promise

Sponsored by the International Coach Federation
ICF Conference – August 2001, Chicago, Illinois

Compiled by:
Leigh Henderson, Leadership Training Room, New York, New York

Abstract

This paper presents the outcomes, discoveries and process experienced by a group of 31 executive coaches attending the third annual International Executive Coaching Summit. The purpose of the one and one half-day meeting was to build on the foundation of the work of the first and second gatherings and enhance the competencies and commitment of individuals. Specifically, the event was staged to continue the definition of the profession of executive coaching, develop the skills practiced with clients and commit to the promise of a collegial community. In addition, time was allocated to establish new and refresh existing relationships with colleagues, to share best practices and knowledge as well as to solidify the summit community through agreement on membership criteria, aspirations and leadership.

Executive coaching is not a profession but an approach used to deliver services, a field that is dynamic, fast-paced and as challenging as the jobs of those being coached. The profile of ECSIII attendees is that of highly experienced entrepreneurs working as external coaches for corporations using executive coaching as one – or the only – approach to leadership and organizational development. Participants agreed on the need for integrity during their coaching engagement and continuing work with clients, awareness of their own values in responding to changing workplace trends and a flexible business model that reflects their own goals and lifestyle. All in attendance made a pledge of stewardship to the field of executive coaching through support of the Executive Coach Committee sponsored by the International Coach Federation, usage of the ECNet as a list serve to electronically communicate with colleagues and adoption of criteria for acceptance of new members to the Executive Coaching Summit.

Table of Contents

Introduction	The Practice	The Promise
<ul style="list-style-type: none">• History• Approach	<ul style="list-style-type: none">• Case Study• Business Models	<ul style="list-style-type: none">• Vision• Collaboration• Presence• Stewardship
The Profession	Marketing, Strategy, Payment, Content/ Service Delivery, Niches, Goals, Exits	Appendix
<ul style="list-style-type: none">• Who are we?• What do we do?• Questionnaire		

Introduction

The first International Executive Coaching Summit (ECSI) was held in October 1999, before the start of the fourth annual International Coach Federation (ICF) conference in Orlando, Florida. In August 2000, the second International Executive Coaching Summit (ECSII) was held before the ICF's conference in Vancouver, British Columbia. The legacy and findings from these two gatherings influenced the agenda and proceedings at ECSIII.

ECSI was organized by the efforts of Jeannine Sandstrom, Lee Smith and Laura Whitworth. Executive coaches were invited to fill out an application and later reviewed for inclusion in the group. As the first wave of invitations was sent out, those invitees were asked to recommend others to be invited to apply. Applicants included individuals well known in the field of executive coaching and leadership development, those esteemed for their roles as public speakers and authors on the topic of executive coaching as well as those associated with coach specific training schools. Attendees of prior summits and/or ICF administrators nominated first time attendees to ECSII and ECSIII.

Following is a breakdown of previous Summit attendance the 31 ECSIII participants:

<u>Summit</u>	<u>#s</u>	<u>%</u>
ECSI:	9	29%
ECSII:	16	52%
ECSIII:	12	39% first time participation
All 3	6	19%

The reason for lack of attendance by previous members to the subsequent summits has not been documented. Informal conversations with those that have not returned reveal that scheduling, lack of actual versus perceived value in the process, changing priorities and business focus are among the reasons for not participating.

To consolidate reference material, a Resource Guide was prepared and given to each attendee at ECSIII. The notebook contains contact information, a biography of each person with a photograph, case study materials and a list of text, video and organizational resources.

The process of ECSIII followed previous summits: create opportunities to get to know all participants through large and small group breakout sessions, as well as interactions at communal meals and breaks. Many in attendance offered that the experience of being with other coaches is

the principal reason they attend. Informal dialogues among attendees allow the chance to network and identify potential business partners.

History

As before, ECSIII was held before the start of the annual ICF conference and sponsored by the ICF. Specific information on the previous events are recorded in two white papers written by Lee Smith and Jeannine Sandstrom: “Summary Findings from the International Executive Coaching Summit: A Collaborative Effort to Distinguish the Profession, October 1999,” and “Summary Findings: Community, Best Practices and Future Perspectives, October 2000.”

These documents are available at the ICF website

<http://www.coachfederation.com/aboutcoaching/summary.htm>.

At the initial gathering in 1999, 36 executive coaches gathered for one reason:

...out of a need to begin to distinguish the profession. Organizations were beginning to see the need for having coaches work with their executives. In response a nucleus of leaders in the executive coaching field desired to identify for the world exactly what executive coaching is and the competencies for delivering such services.

The following year in Vancouver, British Columbia, executive coaches met again to further define the “burgeoning Executive Coaching profession.” Below is a summary of the results.

The extreme level of collaboration that was displayed by the participants pointed to positive potential for future realization of grand visions for the profession although the product of their efforts produced more questions than answers. In the end, the Summit reached an activity level compelling the group to action and connection beyond the limitation of annual summit meetings.

The first summit completed a project as a group of definition, the second building the community and the team, and the third created a space for dialogue and shared learning to foster the commitment and further refine the definition of the work of executive coaches. With the momentum to extend the learning out to the broader community of coaches and specifically executive coaches, the third summit expanded its focus to include a greater alignment with the ICF. In addition, by encouraging anyone who is passionate about executive coaching to participate, the ICF’s Executive Coaching Committee (ECC) held regular meetings to continue interactions between formal summit gatherings. ECC’s Membership Committee and the ECSIII Team made regular posts to the ECNet. ECS members presented the first Executive Coaching Community Dialogue at the 2001 ICF conference to share executive coaching with a larger audience and provide information on the summit process and how to apply for membership.

Approach

The leadership of the ICF was invited in to be present at the beginning of the program. Increased collaboration with the ICF will lead to greater inclusion in the “mainstream” of coaching, such as Organizational Coaching has experienced over the previous year with the development of a newsletter and a designated area on the ICF website.

Bobette Reeder, President of the ICF, welcomed this opportunity to support and recognize executive coaches and acknowledge their worth and contributions globally. “Your bringing in

people creates an opportunity for the growth of the field,” and announced that next year there will be an Executive Coach Pathway at the Conference in Atlanta. “I am looking forward to supporting you in whatever way possible,” she promised.

John Bailey, Executive Director, ICF, observed, “You are the cream of the crop and as the leaders of the field you are needed to show people how to get where they need to be. ICF needs this group to carry the flag of coaching.”

Judy Feld, President-elect of the ICF and an experienced executive coach, was welcomed as a first time member of ECSIII. She commented, “I’m fascinated by the type of work we do the tools and techniques, how we market, how we work and what our professional mix looks like.”

ECSIII was an experiment with a new structure that allowed for learning through reflecting on actual client cases, experiences in the field and in-depth dialogues about individual and group practices. While demonstrating flexibility in the process to allow for re-ordering of topics, the group made important discoveries about the profession, the practice and the promise of executive coaching.

The Profession

The use of coaches has grown to be accepted by corporations internationally as a needed adjunct for development of leaders. The individuals who deliver coaching services are not just executive coaches. ECSIII continued in the tradition of ECSI and ECSII to differentiate executive coaching by the level and range of knowledge of corporate leadership served.

ECSI defined executive coaches as:

...those working with senior level executives who have fiduciary responsibility to multiple stakeholders; stewardship of human, financial, intellectual, capital and social resources; and economic, social and environmental well-being of entire communities. The Executive Coach working with such individuals serves as strategic partner to the executive leader and his/her team. The Executive Coach’s skills include business acumen and financial management, leadership and organizational skills, analytic and innovative thinking as well as an ability to inspire trust and commitment to action.

Who are we?

In the spirit of globalization, 2001’s summit had representatives from Australia, England, Switzerland, Canada and the United States. There was agreement that the delivery of executive coaching follows a similar approach and execution globally.

Questions were raised about “Who are we?” – specifically about the profile of those attending ECSIII, the perception of coaching as a fad and the long-term use of coaching.

An international member commented:

I came to the summit to see how the industry has developed here. Is this group representative? Are the leaders in the field of coaching in this group? I know that some

top people do not want to be connected to ICF, in order to distinguish themselves as 'more professional.'

Publications such as *Fortune*, *Forbes* and *The Wall Street Journal* periodically rate the top coaches working with executives and none of those were in attendance. Ivy League, Big Ten and other major universities and colleges are offering executive coaching courses as part of MBA and other management and leadership programs. Professors of these programs were not in attendance.

ECSIII included thought leaders who have helped to define the field of executive coaching through their practices and performances with Fortune 500 corporations. Additionally, the group included deans and administrators at coach training vocational schools, the president of a graduate school of psychology, instructors in continuing education, presenters at major coaching conferences and active members of the ICF striving to provide stewardship and professional standards of executive coaching. The annual gathering plus the ongoing exchange of case challenges, timely information and referrals, create a 'think tank' atmosphere to address concerns raised by members.

Another member commented that:

We are charged over the next five years with creating the integrity of the field to make it more than just another fad. I want to come back in 15 years time and see this group still going.

The process that evolved during ECSIII furthered commitment to the integrity and vision holders of executive coaching. It provided awareness of the opportunities to keep the energy, connection, and momentum alive and support each other throughout the entire year. The dedication to defining the practice of executive coaching serves not just coaches attending the summit but the process of educating clients that employ people prepared to do this work, students wishing to learn about the practice and the ICF to properly position the group.

Although questions were raised as to what is coming next to the field of leadership development, this discussion was deferred for topics relative to the work of coaches. Time was spent on sharing business models and ways to establish networks of collaboration for large project work and other ideas to assist in coping with economic conditions.

What do we do?

"I'm a consultant with a coaching approach," is how one participant described her work and her response was similar to many in attendance. There is not one profile of a typical executive coach because people who call themselves coaches tend to wear other hats. This raised the question, "Is coaching a distinct profession in and of itself?" The answer was that coaching is not a profession, but an approach used by coaches in their work with leaders and executive management.

The variables represented by coaches present included:

- Industries.
- Size of organizations targeted.

- Past experiences: psychology, education, executive development, accounting, etc.
- Venue for coaching: phone, in person, teleconference.
- Long- versus short-term initiatives.
- Use of metrics and measurements.
- Coaching model.

Similarities in coaching approaches were:

- Leadership development for corporate audience.
- Use of similar assessment tools.
- Organizational development focus.
- Strategic/business planning aspect with senior leadership coaching.

The primary revenue streams for external coaching businesses were as follows:

- Executive coaching.
- Managerial coaching.
- Organizational development consulting services.
- Training.
- Coach training and licensing.
- Products: books, videos, e-books, technology interfaces, and assessments.
- Referral fees from strategic allies.
- Licensing agreements for proprietary programs.

Many ways to bill executive coaching services were offered: hourly billing, retainer agreements, project fees for large groups and day rates for multiple clients. Prices were anywhere from \$200/hr to \$25,000/month for a single executive coaching client.

Internal coaches follow different guidelines and metrics in these areas vary but following similar approaches of alignment, assessment and delivery. There was only one internal coach present (one of the summit recorders) and one former internal executive coach. A more thorough description of internal coaching practices was not possible. The group agreed that more internal coaches be recruited for membership at the next summit.

Questionnaire

To gain a more specific profile of attendees, a short questionnaire was included in the Resource Guide. Of the 31 in attendance, 24 or 77% returned the questionnaire. Following is a summary of key findings in each of 12 areas surveyed. Not all the respondents answered all the questions. A complete listing of results is found in Appendix I of this document.

The white paper from ECSII contains selected demographics of attendees (Smith and Sandstrom, 2000). A summary of a questionnaire distributed by Jeff Auerbach when he attended ECSII is included as Appendix II of this document.

Summary of key findings:

- Eight or 33% of respondents were in attendance at the first summit.
- Eleven or 46% identify the East Coast as the region or base of business and only 1 or 3% of group was international.

- Ten or 42% were in the age range of 50-60 years and no one present was under 30.
- Thirteen or 54% are female.
- Eighteen or 63% earned a master's or other advanced degree.
- All participants rated executive coaching as one discipline they practice and 14 or 58% indicated training and 13 or 54% also checked organizational development as one of the 6 disciplines listed.
- The range of years in executive coaching indicated was from 2 to over 30 with 9 or 38% practicing just 0-5 years and the same amount 6-10 years; in other words, 75% have been in the field of executive coaching for 10 or fewer years.
- Six hold MCC (Master Certified Coach) certification from the ICF, many of whom were "grand fathered" in before the formal process of certification was instituted by the ICF. Coach U (5) and the Newfield Network (5) each represented 21% of the attendees; preparation at 13 other schools or programs was also indicated.
- Twenty or 83% are in the ICF and 9 or 38% a member of the Professional Coaches and Mentors Association; 12 other organizations also had representatives.
- The business structure for most coaches in attendance is "Own my own company," 18 or 75%. Only 1 was internal to an organization and 1 works inside a coaching company.
- When asked, "What portion of your income is from Executive Coaching?" 3 or 13% said 100% while 11 or 57% of respondents to this question earn up to 60% of their income from sources other than executive coaching.
- "What is your estimated business revenue for the next 3 years?" generated the fewest responses; the range was \$50,000 to \$1.3 million in 2001, \$100,000 to \$2.5 million in 2002 and \$125,000 to \$4 million in 2003.

Summary

It is hard to recognize coaching as a distinct profession but rather as a tool utilized by multiple disciplines. ECS represents a group of highly educated individuals who have prepared for coaching through their business experiences or attendance at a commercial vocational school.

Since the Myers-Briggs Type Indicator® (MBTI®) is often used in an executive coaching engagement, ECSIII participants shared their type preferences. A summary of the types identified is presented in Appendix III at the end of this document. This type profile reveals that ECSIII has a very different profile to that of an executive population, prompting the question, "What does this imply for coaching engagements?"

The intent of the Questionnaire was to begin the process to capture definitive data on the pedagogical and philosophical preparation as well as business focus of the group. It also pointed out a huge oversight: a lack of questions that reflect a more inclusive view of who is in the group. For the first time at a summit, there was an African-American. As the summit goes further in its developmental process, it will be helpful to address questions such as, "Does this group reflect the larger profile of those doing executive coaching?" and "Have we as a collective group done enough to reach out to be more inclusive in our membership?"

The Practice

The definition of the “practice” of executive coaching took a two-fold direction. It included the delivery of coaching services and how to address issues that one faces in the course of intimate encounters with businessmen and women. It also included sharing of business models and approaches to executive coaching engagements.

In order to provide input into the design of “The Practice” portion of the agenda, the ECSIII Team sent a post to the ECNet asking members to respond with dilemmas faced during the practice of executive coaching. Below is a sample of those who responded:

- Am I operating outside of my own values and integrity in my coaching so that my clients will like me?
- Am I holding clients accountable for taking actions on the tough decisions that they know they need to take and it looks too..... (fill in the blank)?
- Do I have enough coaching experience and business expertise in a particular area and level to hold the executive responsible to the staff that they manage and lead?

To learn how coaches apply their knowledge and what we need to inculcate to do our jobs better, a participant presented a real-world case study. The name of the client was disguised to protect confidentiality.

Case Study: The Agency

Client Alias: WorldDomination. Com = A subsidiary of “The Agency”

Consulting Company/Individual: John Doe & Associates

Contracted to deliver: Coaching for 20 division managers and the President of WorldDomination.com, which is a subsidiary of a large advertising firm. There are 2 group teambuilding exercises at the outset, and a 6-month coaching commitment for 1 hour every 2 weeks for each division manager. These meetings are on-site.

- Six months of coaching for 20 division managers; 10 clients per coach @ 2 hours per month each.
- Two teambuilding sessions with all division managers.

Short History: John Doe & Associates has a contract to assist division managers to develop the core competencies of management as seen by The Agency (parent company) that include: performance management, time management, creating collaborative relationships amongst team members. WorldDomination.com is not an acquisition, but has been seeded and developed by The Agency over the last six years. The group has grown from 5 at the start to 300 full time employees, and anywhere from 50-100 independent contractors at any given time.

Salient Points: There are 2 coaches delivering coaching to 20 division managers with varying experience and skill in management. The group manages the interactive (Internet) component of a global advertising agency. The median age is 28, and these people are in senior level positions, often compared to division managers in the traditional advertising realm, but frowned upon by “The Agency” who sees them as young, inexperienced and arrogant. Coach #1 works with the

youngest director in the organization, Mark, who is 24. Mark has divulged to his coach that he is “going out” with 3 women on the staff, 2 of whom are being coached by Coach #2, and 1 who is his boss. Coach #2 is barraged by stories from 2 women, Angela and Mai, who are distracted by their tempestuous affair(s) with Mark, and often comment on how it is hurting their work performance. The office is chaotic, lively, and reminds you of a college dorm. The contract is with the President of the Business Unit.

Responses to Case Study

During the discussion following the presentation of the case, the responses and input varied but centered on definitions and boundaries of the work to be done, ethics and law, cultural fit as well as support for the coach.

Below is a summary of the input from ECSIII participants:

- Seduction of hope can be alluring. Have to be willing to walk away from opportunity if there is a conflict with one’s values, the law, etc.
- Have to define O.D. work (change organization) vs. coaching work (helping the person).
- Don’t use money as your value.
- When legal issues are involved within the organization, don’t engage in the work.
- Address situations where companies lack integrity that is compatible with yours; might need to disengage with the contract to protect credibility.
- Contract contingency and design an exit strategy up front to retain power in relationship.
- Some companies have incestuous cycle and I have felt like “I” can help them. The culture has to want to change or the advice is for the coach to run.
- See coaching as apart of systemic intervention.
- Watch out regarding being used to manage what managers don’t want to manage.
- Need to explore the relationship between men and women coaching same or different genders.

Follow-up Article

Only 11 women are CEOs of Fortune 1,000 companies. The path men and women experience to reach the top has implications for how executive coaches demonstrate their values when working with their clients. Following up on one issue raised in the discussion of the case study, ECSIII attendees were given the article, “Toughness Has Risks for Women Executives by Neela Banerjee, August 10, 2001, available at www.nytimes.com. Below is a summary posted at the newspaper’s website:

Bully Broads, executive coaching program in Mountain View, Calif., is helping female executives whose toughness has made them six-figure successes but has become liability, preventing them from rising higher; their no-nonsense ways intimidate subordinates, colleagues and, quite often their bosses, who are almost invariably men; program founder Jean A Hollands says for women to succeed they must become 'ladies first;' says they must ditch hardball styles of 1980's of being assertive and standing firm and learn to hold their tongue; urges them not to choke back tears if they begin to cry at meeting.

Limited exploration of the dimensions of the article raised more questions for discussion, including, “Is this a catch-22 for executive women?” and “Is this article representative of how other executive coaches approach this type of work?”

Business Models

There were almost as many business models shared as there were coaches in attendance. Given that there was only one internal coach and the remainder of attendees contract as external coaches, the group took an entrepreneurial approach to providing services.

The one thread that connected participants is the level with whom they work: CEOs, CIOs, CFOs, COOs, EVPs, VPs, senior partners and executive teams.

In order to determine the variety of business models in the room, we provided the following questions:

- How do you market and what is your strategy?
- How do you get paid?
- How do you synchronous versus a synchronous learning?
- How do you deliver service?
- Who is your target or niche?
- What are your goals?
- What are your strategies to reach your goals?
- What is your exit strategy?

Below is a sample of one of the business models shared:

- Transition from synchronous to a- synchronous learning organized as an array of high potential opportunities.
- Create a monetary value for everything either residual or as an annuity, for example, tapes, CDs, e-books, etc.
- Write a hard copy book and self-market and sell.
- Stay solo and pay for my performance.
- License the business model.
- Have a goal of many streams of income.
- Generate an automated referral base from: e-books, teleclasses, CDs, tapes, etc.
- Offer low cost entry points to products ranging from \$100, \$200, \$300.
- Make everything part of a technology based program, including assessments such as MBTI Step 2, Form Q.
- Use more assessments such as Emotional Competency Inventory (ECI).

The summaries below give an overview of the components of the business models of other executive coaches.

Marketing Strategy

- Start with training and then move to coaching.
- Use expertise of selling and facilitation to get referrals.
- Develop a coaching culture at the organization.

- Link coaching to sometime already existing in the organization such as: strategic planning, 360s, training, reorganization and executive development.
- Link coaching to other non-corporate venues such as individuals who receive bank loans.

Payment

- Get cash up front; avoid stock options.
- Build in warranty: “If we don’t hold our part you don’t pay” and vice versa.
- Value price – have client set fees and force the client to assess the value; this requires trust with the client and prior experience with consultants; set an initial fee and modify it as the work is being done.
- Value price – an executive earning \$200,000 versus the one with compensation of over a million after bonus will have a different level of value on various types of work.

Synchronous versus A-Synchronous Learning

- In person, phone or a mixture.
- Web cam, conference calls, on-line with Placeware or similar technology.
- 24/7 and on-going e-mail.

Delivery of Service

- Length of contact varied from a minimum of 3 to 6 months to a maximum of 2.5 to 7 years.
- Sessions that last from 20 minutes to half days.
- Offer various “packages”:
 - 30-day introduction to focus on development and evaluation: (3) 20” sessions.
 - 60-day fast start
 - 90-day strategic 13 (20”) 3 group (20”)
 - 6 month leader
 - 9 month executive group sessions with sponsors & stakeholders
 - 1 year 20 sessions; 4th session with sponsor; every 90 days, check-in with 2 tiered sponsorship.

Target/Niche

- Male in technology who can’t communicate well.
- Hardworking achievers who worked hard but need new ways to grow.
- Top women executives.
- Achievers who need balance or focus.
- People transitioning from one career to another.
- Derailment and high-potential individuals, groups to shift culture.

Goals

- Train trainers, then managers of the business.
- To become more technology-based and utilize 2 websites.

Exit Process

- License the approach

Summary

The practice of coaching was addressed on many levels: content delivery, cultural trends and technical aspects of conducting the business of coaching. The model of business reflects individual preferences: 2 days/week to 24/7, virtual versus in-person and set payment up front to a results-value pricing.

Prominent in discussions was that the term “value” was used in two distinct ways. One was the values and integrity that the executive coach brings to coaching engagements and how that impacts the quality of work and the alignment with the client’s aspirations and workplace climate. The other was the value given to the services provided during an executive coaching contract and the movement toward engaging the client in assessing the value that they and their company place on the services delivered and the results achieved.

The Promise

The group acknowledged that while differences were often greater than similarities in many areas, core values and outcomes were consistent among ECSIII attendees. We promised to develop strong leadership in multiple environments and with different methodologies in order to portray a strong presence in the field of coaching, to align with the support offered by the ICF and to review opportunities to participate in ICF offerings, programs and activities.

Areas for collaboration include ways we can assist each other in creation and delivery of proposals, attendance at regional and international coaching conferences, possibilities for action as a group and specific action steps so that we can continue momentum that brought us together for ECSIII. As one member said, “The success of executive coaches depends on collaboration, innovation and connections with other executive coaches – in addition to competence. The game is a big one and so are the rewards.”

Vision 3-5 Years

Small group sessions provided the following as components of the vision of coaching and business environments in coming years:

Clients

- Broadened definition of leadership.
- Anyone under pressure needs a coach (may be called something else); managers will provide this for their employees.
- Organizations have to deal with whole person.
- Quality of life issues addressed at younger ages.

Technology

- Technology will ensure continued “face to face” connection.
- Coaching provides the human connection that increased technology has been degrading.
- Online coaching will become a greater focus due to time constraints

Practice

- Strategic partnerships with practitioners in the field.

- Everyone is unlikely to do everything – niches likely.
- Form strategic partnerships with medical professionals.
- Focus aimed on changing corporate cultures.

Collaboration

The range of resources and specialties in the room offered a broad spectrum of possibilities for collaboration. Whereas the large clients may seek out the “big 5” coaching companies, utilizing strategic partnerships among small companies can offer the needed depth of services.

When the suggestion was raised to build a collaborative learning community or a consortium to deliver services as well as to serve as a model for our clients, the questions in response centered on, “How do you operationalize this approach?” One idea was to create a database of individual executive coaches listing their skills sets and what they can be called on to provide (similar to the ICF’s Coach Referral Service). The structure for such a collaboration would include full disclosure, guidelines, open sharing, exit strategies, etc. as well as the commitment to producing meaningful results in a fast pace environment.

Presence

Participants encouraged the presence of executive coaches and representatives of the summit community at events and conferences during the year and greater inclusion in publications. Members offered to coordinate and host mid-year regional meetings and to review opportunities to hold summits at European, Asian and Australian ICF conferences. Ideas for articles or manuscripts can be submitted to the Organizational Coaching Newsletter of the ICF through its committee chair Cynder Niemela and to the International Journal on Coaching through Bill Bergquist.

Stewardship

Executive Coaching Committee

Jane Creswell, Chair, Executive Coaching Committee (ECC), will continue to host ongoing conversations. The “room” is open to all summit participants, executive coaches and those wishing to know more about executive coaching. Ideas for SIGs, web presence at the ICF site and an improved referral database are topics for future discussions and action.

Criteria for ECS Participation

ECC Membership Committee representatives Suzi Pomerantz and David Utts presented a draft of the “Criteria for Executive Coaches for Executive Coaching Summit Community Membership” document and it was enthusiastically approved. This is included as Appendix IV. This Committee will look at how to diversify in order to include participation by international representatives, people of color, internal coaches, etc.

Panel Discussion

An Executive Coaching Community Dialogue was included as a session at the 2001 ICF conference to inform the larger coaching community about the field of executive coaching, the summit group and to solicit applications for new members. Wendy Capland, Steve Lishansky and David Utts moderated a panel made up of Jane Creswell, Mike Jay and Bob Johnson.

ECSIV - 2002

Mike Jay volunteered to coordinate ECSIV and suggested agenda items include further work to establish criteria and ICF relationship.

ECNet: Continuing Dialogue

ECNet membership and participation will continue to be a platform for communication among ECS members. Mike Jay serves as moderator of this vehicle where members can raise issues of concern or to request help with a particular client. Mike regularly posts valuable articles and news of recent publications, useful additions to the Bibliography prepared for ECSIII and included as Appendix V.

Executive Coaching Pathway

Committing to her promise, Bobette Reeder, ICF President, invited Leigh Henderson and Bob Johnson to serve as Co-Chairs of the first Executive Coaching Learning Track set to debut in 2002 at the ICF conference in Atlanta.

Attendees at Executive Coaching Summit III

Jan Austin, Jeff Berger, William Bergquist, Sue Bethanis, Matthew Beucler, Wendy Capland, Jane Creswell, Judy Feld, Elizabeth Ferguson, Donna Fowler, Susan Gatton, Cheryl Gray, Elizabeth Guilday, Leigh Henderson, Mike Jay, Bob Johnson, John Lazar, Steve Lishansky, Steve Maconachie, Diane Malnekoff, David Martin, Linda Miller, Cynder Niemela, Suzi Pomerantz, George Ritcheske, Jeremy Robinson, Michael Sanson, Karlin Sloan, David Utts, Ingrid Wolfson and Linda Yort.

APPENDIX I: QUESTIONNAIRE DATA

How were you introduced to the Executive Coaching Summit?

Original members	8
Prior attendees	12
Referral from ICF	2
Colleague reference	2

Region (or base of business):

East Coast, USA	11
West Coast, USA	8
Midwest, USA	3
Australia	1
Other: Virtual/global	1

Age:

20-30	0
30-40	4
40-50	8
50-60	10
60-70	2

Gender:

Female	13
Male	11

Education:

PhD/PsyD	3
MA/MS	15
BA/BS	6

Disciplines:

Executive Coaching	24
Training	14
Organizational Development	13
Managerial Coaching	10
Personal Coaching	7
Psychologist/Clinical Practice	3
Other disciplines: Performance Coaching, Somatic Coaching, Sports Psychologist, Leadership Development	

Year of Experience

Years	<u>Executive Coaching</u>	<u>Coaching</u>	<u>Business</u>	<u>Clinical Practice</u>
0-5	9	2	4	1
6-10	9	12	3	0
11-15	3	2	0	1
16-20	2	2	4	0
21-25	0	1	2	1
26+	1	1	5	1

Years other: Consulting: 8 years; Behavioral Health: 10; Inside Corporation: 7; CEO: 20; Teacher: 3; Education: 20.

Please list coaching related training/certification programs

Master Certified Coach	6
Coach U	5
Newfield Network	5
Corporate Coach U	2
Academy for Coach Training	1
Center for Creative Leadership	1
CMC	1
Center for Executive Coaching	1
CPEC	1
Coach Training Institute	1
Executive Coach Academy	1
Executive Coaching Institute	1
Landmark	1
Mentor Coach	1
Neuro Linguistics Programming	1
New Ventures West	1

Are you a member of the following organizations?

International Coach Federation	20
Professional Coaches and Mentors Association	9
Organizational Development Network	7
American Society for Training & Development	5
Society Human Resource Management	2
American Psychological Association	2

Others:

Women in Business, Human Resource Management Group, International Society for Performance Improvement, Association for Quality and Participation, Association for Psychological Type and ACMP.

Business Structure

Own my own company	18
Partner with others on specific projects	10
Private individual practice	7
Internal to Organization	1
Other: Work inside coaching company	1

What portion of your income is from Executive Coaching?

100%	3
80-99%	2
60-80%	5
50-60%	5
30-50%	4
20-30%	0
10-20%	3
0-9%	1

What is your estimated business revenue?

	<u>2+M</u>	<u>1-2M</u>	<u>600K+</u>	<u>300+</u>	<u>200+</u>	<u>100+</u>	<u>0-99K</u>
2001	1	1	3	3	3	7	2
2002	1	1	2	2	3	2	0
2003	2	1	1	4	0	1	0

Appendix II: Survey of Roles and Competencies of ECSII Attendees

The following was prepared by Jeff Auerbach, Ph.D., an attendee at ECSII, and presented at the American Psychological Association 109th Annual Convention, August 25, 2001, San Francisco, California.

Executive coaching has been a major growth area for psychologists in the past five years yet the roles and qualities of effective executive coaches has not adequately been empirically examined. The senior executive coaches invited to attend the 2000 Executive Coaching Summit of the Internal Coach Federation Meeting in Vancouver, British Columbia were selected to survey their opinions on the predominant role of executive coaches and the most important competencies for effective executive coaching. The entire group of 24 senior executive coaches was selected for the survey. A survey form was constructed building on the ideas previously discussed in the literature as related to executive coaching roles and competencies (Diedrich, 1996; Smith and Sandstrom, 1999; and Brotman, Liberi and Wasylshyn, 1998).

Nineteen of the executive coaches responded to the survey. The average age of the executive coaches, years of experience in the coaching field and percent male/female was quantified. The highest degrees of the coaches were Ph.D.'s and the lowest level was Bachelors level with specific coach training.

A 30-item survey was administered. The executive coaches were asked to rank order, from highest to lowest, the predominant roles they engage in while executive coaching. In addition, they were asked to rank, from highest to lowest, the competencies that they believe are most important to being an effective executive coach.

The most frequent activities executive coaches engage in are: aid in the development of effective executive skills; identify and modify managerial style to improve effectiveness of individuals and teams; help executives identify and utilize key strengths; and aid in the adaptation to change.

This group of experts identified that outstanding executive coaches would be high in the following areas: integrity, ethics and trust; listening skills; self-knowledge; understanding of leadership development; and excellent communication skills to enable the coach to operate well in the executive's development.

Please contact Jeff at ja@executivecoachingcollege.com for more information.

Appendix III: Myers-Briggs Type Preferences of ECSIII Attendees

ECSIII participants shared their type preferences found previously by taking the Myers-Briggs Type Indicator® (MBTI®). The group's profile reveals that ECSIII has a very different profile to that of an executive population.

Questions raised by the results below include:

- What does the type preference of the group imply for coaching engagements?
- What, if anything, does it mean that there is very little "S" in the group?
- Are we in a helping profession?

Temp	E/I	Dominant	J/P
7 = NT	21 = E	10 = N	12 = J
1 = SJ	4 = I	2 = (N)	11 = P
16 = NF		5 = T	2 = Undecided
		4 = F	
		2 = (F)	
		2 = Undecided	

() Indicates that this is the type preference the respondent thinks that they are.

Appendix IV: Criteria for Executive Coaches for Executive Coaching Summit Community Membership

Submitted by Suzi Pomerantz and David Utts; Approved by ECSIII

Basic Premise:

As a seasoned, experienced community of Executive and Corporate Coaches, we intend to maintain the high standards of membership that we have enjoyed to date in our ECSummits. This is imperative to ensure the attainment of common goals of the community such as sharing best practices, learning from peers, and stewardship of the profession. To that end, we are looking for a certain experience level and track record of contribution to the profession, and the following criteria will allow us to screen candidates who apply for membership/ participation in our community. Community membership includes: ECNet participation and invitation to future ECSummits.

Criteria: Either:

1. Attendance at previous ECS, or
2. Sponsorship references: Invitation by two or more attendees of previous ECS.

If a candidate has neither of the first two criteria, he/she must provide documentation of all of the following:

3. Experience level: (a) Years as executive coach, (b) years as executive or with corporate leadership experience (Note: “Years as executive coach” is not quantified with a minimum. We want senior, experienced practitioners and we discussed that someone with fewer than 5 years executive coaching or corporate coaching experience may have 15 plus years executive or management experience, which we consider valuable to our community, so we will need to establish some baselines here).
4. Education level: Requirement of Master’s Degree or higher.
5. Contribution to executive coaching profession: Applicants must list what they’ve done (led committees, taught classes for executive coaches, authored and published executive coaching, executive development, or business/leadership materials (books, articles, etc).
6. Written references from 3 – 5 MCC certified executive or corporate coaches OR 3 - 5 senior executives or executive coaching “sponsors” in corporations, including contact information for all references. References must be willing to be contacted.
7. Applicant’s name, address, phone numbers, e-mail address, website.

Appendix V: Executive Coaching Bibliography

- Argyris, Chris, *Integrating the Individual and the Organization*. San Francisco, Jossey-Bass, 1990.
- Argyris, Chris, *Knowledge for Action: a guide to overcoming barriers to organizational change*. San Francisco: Jossey-Bass Pfeiffer, 1993.
- Arlin, P.K., "Wisdom: The art of problem finding." In R. Sternberg (Ed.), *Wisdom: its nature, origins, and development (pp.230-243)* Cambridge, UK: Cambridge University Press, 1990.
- Beck, A.T., Rush, A.J., Shaw, B.F., & Emery, G., *Cognitive Therapy of Depression*. New York: Guilford, 1979.
- Block, Peter, *Flawless Consulting: A Guide to Getting Your Expertise Used, 2nd Edition*. San Francisco, California: Jossey-Bass Pfeiffer, 1999.
- Church, A.H., *Managerial Self-Awareness in High Performing Individuals in Organizations*. *Journal of Applied Psychology*, 87(2), 281-292, 1997.
- Cook, Marshall J., *Effective Coaching*. New York, New York: McGraw-Hill, 1999.
- Cooper, R.K., & Sawaf, A. *Executive E.Q.: emotional intelligence in leadership and organizations*. New York: Grosset/Putnam.
- Cooperrider, D.L., *The Child as Agent of Inquiry*. *OD Practitioner*, 28(1&2), 5-11, 1996.
- Fergusun, C.K.. *Ten Case Studies from an OD Practitioners Experience: coping with organizational conflict*. *Organizational Development Journal*, 4(4), 20-30, 1986.
- Goleman, Daniel, *Working with Emotional Intelligence*. New York, New York: Bantam Books, 2000.
"Leadership That Gets Results," *Harvard Business Review*, March-April 2000.
- Hall, D.T., Otazo, K.L. & Hollenbeck, G.P. *What Really Happens in Executive Coaching*. *Organizational Dynamics*, 39-53, 1999, winter.
- Hammond, Susan, *The Thin Book of Appreciative Inquiry*. Plano, TX: Kodiak Consulting, 1996.
- Hargrove, Robert A., *Masterful Coaching Fieldbook: grow your business, multiply your profits, win the talent war*. San Francisco, California: Jossey-Bass Pfeiffer, 1999.
- Hersey, P. & Blanchard, K. *Management of Organizational Behavior: utilizing human Resources (3rd ed.)* Englewood Cliffs, NJ: Prentice-Hall 1977.

- Hogan, R., Curphy, G. J. & Hogan, J. *What We Know about Leadership: effectiveness and personality*. American Psychologist, 49(6), 493-504, 1994.
- Kegan, R. *In Over Our Heads: the mental demands of modern life*. Cambridge, MA: Harvard University Press. 1994.
- Kelly, P.J. *Coach the Coach*. Training and Development Journal, 39(11),54-55, 1985.
- Kilburg, Richard R., *Executive Coaching: developing managerial wisdom in a world of chaos*. Washington, DC, American Psychological Association, 2000.
- Lakoff, G., & Johnson, M. *Metaphors We Live By*. Chicago: University of Chicago Press., 1980.
- Levinson, H. *Counseling with Top Management*, Consulting Psychology Bulletin, 43(1), 10-15, 1991.
- Lukaszewski, J.E. *Behind the throne: how to coach and counsel executives*. Training and Development Journal 42(10), 32-35, 1988.
- O'Connell, J.J.. *Process Consultation in a Content Field: Socrates in strategy*. Consultation: An International Journal, 9(3) 199-208, 1990.
- Popper, M., & Lipshitz, R. *Coaching on Leadership*. Leadership and Organization Development Journal, 13(7) 15-18, 1992.
- Schula, D. & Blanchard, K. *Everyone's a Coach*. New York: Harper Business. 1995.
- Sperry, L. *Working with Executives: consulting, counseling and coaching*. Individual Psychology: Journal of Adlerian Theory, Research and Practice, 49(2), 257-266, 1993.
- Stacey, R.D. *Complexity and Creativity in Organizations*. San Francisco: Berrett-Koehler Publishers, 1996.
- Tichy, N. & Charan, R. *The CEO as Coach: an interview with Allied Signal's Lawrence A. Bossidy*. Harvard Business Review, 68-78, 1995 March-April.
- Tomkins, S.S. *Affect, Imagery and Consciousness (Vols. I, II)*. New York: Springer. 1963.
- Vaill, P.B. *Managing as a Performing Art: new ideas for a world of chaotic change*. San Francisco, Jossey-Bass, 1991.
- Voss, T. *Sharpen Your Team's Skills in Coaching*. New York: McGraw-Hill, 1997.

Weisinger, H.D. *Emotional Intelligence at Work*. San Francisco, Jossey-Bass 1998.

Whitmore, J. *Coaching for performance*. San Diego, CA: Pfeiffer, 1994.

Whitherspoon, R. & White, R.P. *Four Essential Ways that Coaching Can Help Executives*. Greensboro, NC: Center for Creative Leadership, 1997.

Whitworth, Laura, Kimsey-House, Henry & Sandahl, Phil, *Co-Active Coaching: new skills for coaching people toward success in work and life*. Palo Alto, California: Davies-Black Publishing, 1998.

Yammarino, F.J. & Atwater, L.E.. *Understanding Self-Perception Accuracy: implications for human resource management*. *Human Resource Management*, 32(2-3), 231-247, 1993.

Note: Many of the above references were taken from Richard R. Kilburg's excellent book *Executive Coaching: Developing Managerial Wisdom in a World of Chaos*. We acknowledge his contributions to the professional development of the field Executive Coaching.