

Executive Coaching Summit IV: Necessary Dialogue Post Event Reflections

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1 INTRODUCTION

The 4th International Executive Coaching Summit (ECS IV) took place on October 21st and 22nd, 2002 in Atlanta, Georgia, following in the footsteps of the three previous meetings:

Event and date	Location	Focus/themes
ECS I October 1999	Orlando, Florida, USA	Defining and distinguishing executive coaching.
ECS II October 2000	Vancouver, British Columbia, Canada	Business best practices, the future of executive coaching.
ECS III August 2001	Chicago, Illinois, USA	Community building shared learning through case study, exploring greater alignment with ICF.
ECS IV October 2002	Atlanta, Georgia, USA	Discussed below.

Like the previous three Summits, “Necessary Dialogue” was held prior to the Annual International Coach Federation (ICF) Conference, and was attended by a group of experienced executive coaches who had either been invited or had successfully navigated a rigorous application process designed to ensure the attendees’ experience in, or contribution to, the field.

Unlike previous Summits, the size of the group had grown to 71 participants, compared with 30-36 attendees at each of the earlier events. This jump in participant numbers coincided with the decision to allow the event’s agenda to emerge spontaneously, rather than providing a structured list of topics for discussion in advance. With a large number of participants attending their first Summit meant that many were unfamiliar with the work of the earlier events,

The Atlanta ECS was also notable for a stronger representation of internal executive coaches from major corporations, and a small contingent of colleagues from countries outside of the United States, namely Canada, China, Germany, Sweden and Switzerland. However with 92% of participants being US-based conversations tended to focus on the North American experience.

This paper attempts to organise the questions, insights, findings and dilemmas about the field of executive coaching that emerged from this process. Where relevant the authors make links back to the valuable work of the previous Summits, illustrating recurring themes and the foundations already laid. In addition, with the benefit of almost a year of post-event reflection, we have provided some additional insights, commentary and questions for further consideration.

In particular we adopted a coaching skill in listening for what was not being spoken about, looking for issues that Summit members or the community as a whole might not yet be ready to confront. Therefore this paper takes a position in exploring some issues that were not given the equivalent attention at the Summit, and in places does not explore themes that appear to have been adequately explored at previous events.

The paper is organised into seven sections. Following this introduction we reflect briefly on the process used for facilitating the event, then we present our account of and reflections on three key areas – Dilemmas in the Field, The Client’s Perspective and Business Practice. Finally we offer some challenges for the future work of the ECS community and some closing thoughts.

2 EVENT PROCESS

An important difference in the design of ECS IV was the process that the meeting took. In his post event summary¹, Mike Jay (Summit Coordinator) described his desire to counter the structure of the previous events with an approach that would allow dialogue to emerge unhindered by a pre-designed agenda. Mike explored how to provide a flexible environment in which many participants could take on leadership of sub-processes, whilst retaining his hold on decisions about the process as a whole to ensure that it did not descend into chaos.

The process was well-received by those participants looking for freedom to set the direction of the conversation at the event, whilst being less appreciated by those who would have preferred more tangible goals at the outset with a structured plan to meet them.

This approach provided an interesting challenge to the authors of this paper. Given the wide variety of conversation threads, we decided to focus on those that added to the knowledge about executive coaching that has been provided in the reports on the preceding ECSs, known as “White Papers”². We have provided minimal reporting of conversation threads that have already been well explored in previous papers.

3 DILEMMAS IN THE FIELD OF EXECUTIVE COACHING

There is plenty of evidence that executive coaching is an activity that is widely practiced in international business – from the number of press articles on the subject through to the levels of interest in ECS IV and the executive coaching track at the ICF conference that followed it.

However executive coaches and the wider community continue to debate some key questions about executive coaching. These were a focus of discussion during ECS IV, as they had been to some extent in the previous three Summits. These questions include:

- Is executive coaching a profession or simply a methodology?
- What distinguishes the role of an executive coach from that of a personal coach or management consultant?
- What role should credentialing of executive coaches play? What would be the key requirements for such credentials to be awarded and what type of institutions might be needed to develop them?
- What role can academic research play in substantiating the effectiveness of executive coaching?

Below we visit each question linking the discussions at ECS IV to those at the previous Summits as reported in the White Papers from those events.

3.1 Is executive coaching a profession or simply a methodology?

Despite the fact that the Summary Findings from ECS III conclude that executive coaching is “not a profession but an approach”, this debate continued during ECS IV. Arguments in favour of distinguishing executive coaching as a profession include that it requires specialist skills, experience and sensitivities that are distinct from those needed by coaches in general (see 3.2 below). However some see executive coaching as more a speciality within the wider profession of coaching, such as a specialist medical practitioner within the wider field of medicine.

Whether a profession in its own right, a subset of the maturing profession of coaching or simply a methodology employed by consultants, trainers and psychologists, the reaction of other professions to the growth in executive coaching, and the expectation of interest from regulatory bodies, are raising the pressure for some decisions by executive coaches as a community. One high profile example of a challenge from another profession was the June 2002 Harvard Business Review article “The Very Real Dangers of Executive Coaching”³ authored by a Steven Berglas, a clinical psychologist, subsequently countered by letters to the editor from Charles Pfeffer and Cork Motsett⁴ published in the September 2002 issue.

It seems apparent that the distinguishing of executive coaching from other practices (including personal coaching) would be bolstered by the declaration of a distinct profession – including the creation of a professional body with its own credentialing processes. This would be a significant step and there are voices in the ECS community in favour and against such a move, people with specific concerns and others who have not clarified their position. We attempt to summarize some of the key issues in this debate below.

The desire by executive coaches to be recognised as distinct professionals is evidenced by the creation of the Executive Coach Summits as invitation-only events held under their own banner. However the temptation to ally with the wider coaching profession is shown by staging the Summits alongside annual International Coach Federation (ICF) conferences, with partial or in-kind sponsorship from the ICF.

We hypothesise that the desire for executive coaches to be recognised as a distinct professional group is driven by a number of factors which include the:

- Intense competition in the market for providing such services to executives, in particular with management consulting, psychology and training professionals;
- Desire to achieve more in business and/or societal terms by establishing coordinated communications with the clients, government and other interested parties;
- Additional skills and experience required of executive coaches by their clients (see below) and;
- Higher fees available to professionals in this market when compared with the broader personal coaching market for individuals.

The authors observe that whilst there have been repeated calls by some executive coaches to form their own professional body; these have yet to be acted on. Today executive coaches act both as independent professionals affiliated with existing professional bodies (such as ICF, the American Psychological Association (APA), the American Society for Training and Development (ASTD) etc.) and as part of specific executive coaching communities, of which the Executive Coaching Summit appears to be a leader.

Those in favour of a professional body for executive coaching argue that the potential to extend their work will be better served by increased organisation as a professional group, not only to provide robust defences against rivalry from other groups and a coordinated response to attempts to regulate, but by enhancing the quality of services offered through the establishment of a credentialing structure and the articulation of more coherent information about executive coaching.

However, there appear to be some layers of resistance to taking this step amongst executive coaches, which thus far have outweighed the factors in favour suggested above.

Potential obstacles to creating a professional body include:

- Busy professionals' reluctance or inability to commit the necessary volunteer time in the foundation stages;
- Sufficient successes already achieved by the first waves of executive coaches without the existence of a professional body - market leaders have less of an incentive to create a professional body which might heighten competition;
- Concern about creating tough credentialing standards which might require some executive coaches to return to the classroom;
- Executive coaches' preference for independence and self-sufficiency making a network more attractive than a professional body and;
- Only limited support apparent from the academic world at this stage – with a scarcity of academic programs in executive coaching, and academic research still in its early stages.

Whether such a professional grouping finds its home as a sub-division within an organisation such as ICF, or as a stand-alone body is for executive coaches to decide. We recommend that the ECS community work towards clarifying their position on this issue as part of our comments at the end of this paper.

3.2 What distinguishes the profile of an executive coach from that of a personal coach or management consultant?

ECS I participants distinguished that there is a base level of coaching competencies that all coaches need to have at their disposal (for example listening, creating an environment for change and facilitating self awareness), and then that there are additional characteristics that set executive coaches apart. These are detailed in the ECS I Summary Findings, which also include a proposed definition of executive coaching,

Distinguishing characteristics of an executive coach:

1. A firm grounding in business knowledge and competencies

2. Thorough understanding of the world of the executive leader
3. A broad understanding of leadership and leadership development
4. Knowledge of systems dynamics (organization and community)
5. Highly developed communication proficiency allowing them to operate in the executive's environment
6. Stature and reputation that gains respect
7. Knowledge of adult development frameworks
8. High standards of personal and professional ethics
9. Advanced coaching skills and capabilities
10. A commitment to lifelong learning

Items 1 to 6 on this list reflect the requirement for an executive coach to have a deep understanding of their client's working environment, and techniques for supporting their clients in being both more effective and more fulfilled in their roles as leaders. Personal coaches do not necessarily need items 1 to 6 to be effective, so long as they can call on items 7 to 10. Management consultants working with executives are traditionally hired to provide expert advice and implementation support to executives. The characteristics of a management consultant working with executives may overlap substantially with the list above although one might expect a reduced emphasis on the development and coaching of the executive.

3.3 What role should credentialing of executive coaches play, what would be the key requirements for such credentials to be awarded and what type of institution(s) might be needed?

Whether one sees executive coaching as a distinct profession or a specialist process, the majority of opinion supports a role for credentialing in fostering high standards of competence in the field. ECS II provided a solid foundation on which to build such standards, distinguishing characteristics of an executive coach and advanced executive coaching proficiencies (see Appendix). As discussed above a credentialing process needs a sponsoring organisation, however the ECS community have yet to decide what kind of organisation would best serve it in developing an executive coaching credential.

In discussing this issue ECS IV delegates acknowledged the ICF's role in developing and propagating coaching credentials, but worried that it had more of a focus of working with personal coaches and coaches in training. Some expressed a fear that the many and varied types of coaching offered by ICF members would undermine the potential to offer a focussed positioning of executive coaching under an ICF banner. International ECS delegates wondered about the ability of a US centred organisation such as ICF to accommodate differences between executive coaching in different countries.

Delegates made reference to some other organisations that might offer possibilities for developing certification for executive coaches, such as the International Consortium of Business Coaches, National Association for Business Coaches and the International Association of Coaches. It should also be noted that national associations for coaches are springing up in various countries to meet the demands of their local marketplaces and legal frameworks. In some European countries coaching has developed faster in the business and executive sectors, than in personal coaching, whereas the reverse has been true in North America. Future ECS groups might want to consider whether credentialing of executive coaches is best managed on a national or an international basis.

In their article on the future of executive coaching in the second issue of the International Journal of Coaching in Organisations (May 2003)⁵, Sheila Maher and Suzi Pomerantz argue for the development of executive coaching credentials either in alignment with ICF's existing PCC and MCC processes or as a stand-alone initiative. Such credentials should distinguish executive coaches from personal/life coaches by recognising specific experience in business as an executive or working as a coach or consultant with executive clients, whilst also validating their coaching training and competency.

It should also be noted that there are some ECS members who argue for an approach to credentialing that places a higher emphasis on the delivery of outcomes in work with clients, on the basis that this is likely to be the ultimate measure of success in this field. Current credentialing approaches tend to focus on a blend of completion of accredited training, accumulated client hours, peer evaluation and/or competency evaluation but without assessment of specific client outcomes.

3.4 What role can academic research play in substantiating the effectiveness of executive coaching?

As might be expected from a new profession with low technological barriers to entry, the practice of executive coaching has accelerated ahead of rigorous study into it. For coaching and executive coaching to develop into mature professions the development of a body of different kinds of credible research are needed, including scientific work meeting international standards. One might argue that the steady growth of executive coaching must be evidence in itself of its effectiveness, but a critical potential buyer of such services requires a more thorough analysis.

Research is sought which sheds light on issues around the effectiveness of executive coaching – addressing questions such as which are the critical success factors for executive coaching engagements, how does executive coaching work, what kind of measures are helpful in evaluating executive coaching effectiveness. Further important areas for research include studying the various ways in which organisations use executive coaching, and how these may interact with other executive development processes and different organisational forces and initiatives. Executive coaching is a practice that draws on several fields of inquiry, such as management science, organisational behaviour, psychology and philosophy. The inter-disciplinary nature of the practice makes for fascinating and challenging research.

Executive coaching as a field has thus far received limited attention from academic researchers, although a small number of ECS IV members are engaged in academic research, and some important research initiatives are now developing. Notably, ECS IV marked the launch of an important initiative by Bill Bergquist and John Lazar - their International Journal for Coaching in Organizations features an editorial board drawing on several members of the ECS community.

Other important initiatives relating to research into the field of coaching as a whole include the first conference for Evidence-based Coaching (Sydney, Australia, July 2003) that attracted 280 delegates, and the first ICF Research Symposium (Denver, USA, November 2003). At the time of writing two further academically oriented journals have been announced. Such publications and events are critical to sharing research findings and building communities of researchers and interested practitioners. The ICF Research and Development committee is scheduled to launch an on-line repository of research studies and articles in the second half of 2003, which will support propagation of research findings to the wider public.

4 THE CLIENT'S PERSPECTIVE

Questions related to shaping the future of executive coaching in relationship to customers and clients first emerged at ECS II (2000) with some generalizations that continue to be true about the foundational elements of what clients are facing. These include fostering strategic thinking and understanding of systems, incorporating technology, increasing awareness of the powerful impact of emotional intelligence and creating collaborative environments, all of which were seen to be bridges to the future.

It is informative to note that at ECS II, several questions were posed as critical areas that might need to be addressed in the future by this group, and that these questions did in fact emerge for further exploration at ECS IV. The questions that were articulated for future work in 2000 were:

- What do clients need from executive coaches?
- Where do executive coaches go to learn and grow?
- Will executive coaching be the same industry in the coming years?

Through the open space format of ECS IV, it was clear that there was increased urgency to address and respond to these questions from the perspective of executive coaching clients. After some reflection and dialogue the delegates arrived at the following more specific questions:

- What are the issues challenging executives over the next 3-5 years?
- What are the competencies leaders need to have to successfully navigate these issues?
- What are the implications for executive coaches and executive coaching?

4.1 What are the issues challenging executives over the next 3-5 years?

Changing Demographics

There are significant generation difference issues in today's workforce, creating new managerial, leadership, and organizational challenges. Increasingly there is a younger, more diverse workforce that has different work expectations and rules of engagement. This trend is a reality that leaders must confront, integrate and embrace.

Board Governance Issues

The exposing of corporate malfeasance over the past couple of years and the resulting closer scrutiny from regulators, customers and the press have already brought these issues to the fore for executives, boards of directors and shareholders. Executives will need to become more proactive in addressing ethics issues in their operations and the CEO/BOD/Shareholders triangle relationship. They also need to pay closer attention to elements of their organisation's corporate culture such as organisational climate, employee satisfaction and customer satisfaction which can provide valuable feedback as to the effectiveness of governance processes in supporting the organisation's health and prosperity.

Leading Amidst Uncertainty

In previous Summits participants often returned to the challenges facing their clients due to rapid changes brought by advancing technology, which has delivered sometimes revolutionary change to specific industries, and steady incremental change to all. Whilst the bursting of the 90s bubble has taken some of the edge off these pressures, a widely unexpected source of uncertainty and risk arrived with the terrorist attacks on September 11, 2001. In the short-term these tragic events called on executives' crisis management skills, whether their organisations were directly or indirectly involved. In the aftermath leaders will continue to be challenged to help their organisations steer a steady course in the face of significantly higher levels of uncertainty about security, and both political and economic stability.

New Ways of Working

Executives will have to reconcile growth with sustainability, accepting higher levels of responsibility for the impact their organization has on the world. For example organisations from developed countries will continue to face increasing pressures from their customers to demand responsible working practices from subsidiaries and suppliers in developing countries. Technological development will continue to drive change, advancing the virtual workplace, as well as facilitating new forms for customer interaction, and new ways of working with suppliers and strategic alliances.

Working with a Global Perspective

As globalisation marches on executives will need to continue to develop their awareness of how cultural differences and histories between different peoples impact the growth and effectiveness of a global business.

4.2 What are the competencies leaders need to have to successfully navigate these issues?

While many companies define a specific set of desirable leadership competencies based on the company culture, values, and vision, there are a number of competencies leaders will need in order to successfully navigate through the issues defined above. Some of these are characteristics such as flexibility, adaptability, courage to confront, honesty, decisiveness, sense of ethics and integrity, and emotional intelligence that models and promotes humility while providing inspirational leadership, building relational bonds, professional will, being other-focused and acting for the common good.

Additionally, there are competencies that build organizational capability such as attracting and retaining talent, using coaching as a core leadership competency, maintaining a balance between outcomes/results and the impact of decision-making on people and processes, systems thinking and, of course, business acumen. Delegates also voiced a need for leaders to have the personal and organizational awareness that the role of CEO is larger than one person and to be able to identify and support people who can create an office of the CEO.

4.3 What are the implications for executive coaches?

Several questions arose for ECS participants as they discussed clients' current and future needs.

- How will executive coaches prepare themselves to help their clients meet the challenges they will face, to market coaching services, and to communicate what they have to offer?
- How can the ECS forum be used to better prepare executive coaches?
- What approaches and actions do they need to take to help clients with their challenges?

First and foremost, executive coaches need to raise their own awareness of the above issues and how they link to the client's specific environment in order to help clients prioritize which topics to work with. Given the challenging nature of guiding executives through change coaches need to be actively pursuing their own development so as to keep themselves in top form.

Specific actions suggested by the ECS participants included:

- Creating communities of practice focused on what members are doing to help themselves support executives in dealing with the changes they face. For example, to take existing competency models for leading in uncertainty and compare them with the competencies displayed by actual executive clients;
- Becoming more widely read on business, economic and political issues facing executive clients, sharing information and article summaries;
- Sharing approaches, tools and materials;
- Learning from thought leaders using Special Interest Group (SIG) meetings and other forums.

Whatever the learning methods or processes that emerge, the results need to be shared on a regular basis, more frequently than at the annual Summits.

5 THE BUSINESS OF EXECUTIVE COACHING

5.1 Categories of executive coaching suppliers

As at the previous Summits there were wide ranging discussions at ECS IV about different aspects of the business of executive coaching. With many people attending an ECS for the first time, in the midst of difficult economic times, there was a strong interest in looking at how to build and sustain successful executive coaching businesses, with a particular focus on how to develop and manage healthy alliances between such businesses.

In reviewing the papers that followed the previous Summits it became clear that these subjects have been of interest at each event. We note that these discussions have tended to address the needs of independent executive coaches who have their own businesses, or work in small partnerships. We believe that this is because these categories of suppliers of executive coaching services represent the majority of those attracted to the ECS. However there are other categories that are less represented in the ECS community but are still important players in the executive coaching market. Two examples are professional service firms that offer executive coaching alongside a wide range of other services, and training institutions that can offer teams of their best faculty and graduates. This observation raised awareness that it would be useful to offer an overview of the categories of suppliers of executive coaching.

We therefore offer a first pass at this below, with the help of some conversations with seasoned ECS members. We hope that the ECS community will review and enhance this analysis at subsequent meetings.

Categories of suppliers of executive coaching services

- Professional service firms with executive coaching divisions
- Executive coaching firms
- Training institutions offering executive coaching services
- Executive coaching networks
- Networked independents
- Independents

This list is ordered by the likely size of the organizations in each category in terms of headcount – the order is not meant to suggest anything about the likely quality of service provided by each category of supplier – clients must explore for themselves their priorities against the ability of each supplier to meet them.

However one might expect that each category offers certain strengths and opportunities when compared with the others, and conversely weaknesses and risks. **Table 1** following describes each category and

Table 1: Categories of suppliers of executive coaching services

Type of EC Supplier	Description and Characteristics	Strengths and opportunities	Weaknesses and risks
Professional service firms with EC divisions	<ul style="list-style-type: none"> Companies with established businesses in professional service areas (e.g. management consulting, organisation development, training and development, HR/compensation, outplacement) that employ ECs or have EC divisions. 	<ul style="list-style-type: none"> Reputation in the market. Professional standards. Pre-existing relationships between supplier and client firm. Experience in managing larger engagements. 	<ul style="list-style-type: none"> ECs may not have specialist skills. Confusion with consulting approach. Potential conflicts of interest between different parts of the firm. Smaller pool of specialist ECs to choose from than EC networks.
Executive coaching firms	<ul style="list-style-type: none"> Focussed EC firms, usually with a core staff of employed professionals and/or partners. Broader team of associates who work on a contract basis under the firm's brand. Firm may offer its own methodology. 	<ul style="list-style-type: none"> Specialist ECs with experience working together. Ability to handle larger engagements. Consistent methodology available. 	<ul style="list-style-type: none"> Small choice of firms given relatively new market, not so many medium to large firms established to date. Less choice of coaches than EC networks.
Training institutions offering EC services	<ul style="list-style-type: none"> EC training institutions who also offer services from a pool of faculty members and graduates. 	<ul style="list-style-type: none"> Reassurance that ECs have standardised training, if the faculty/principals also have engagement skills – similar strengths to EC firms. 	<ul style="list-style-type: none"> Less engagement management skills than focussed firms. Less choice of coaches than EC networks.
Executive coaching networks	<ul style="list-style-type: none"> Focussed EC networks containing 20-100 members allowing customers a wide choice from one source. Develop network brand, supporting it through careful new membership screening. Network members also operate under own brands. 	<ul style="list-style-type: none"> Breadth of choice available in selecting EC. Potential for staffing larger engagements. 	<ul style="list-style-type: none"> Less quality control in selection and monitoring of ECs. Network members may have less experience working together.
Networked independents	<ul style="list-style-type: none"> Independent ECs with their own brands. Develop a variety of alliances. Can offer teams of ECs and consultants. May be members of EC networks, and/or associates of EC firms. 	<ul style="list-style-type: none"> Ability to customise her/his team to the client's needs. Lower overheads may translate to lower fees. 	<ul style="list-style-type: none"> Less professional or administrative resources than a larger firm. Less input and supervision by colleagues
Independents	<ul style="list-style-type: none"> Independent ECs who tend to work alone, or with one or two colleagues. May have developed their own strong brands and hence attract a steady flow of business by reputation/personal network. Refer larger projects to Networked Independents or EC firms. 	<ul style="list-style-type: none"> Unique skills of the independent may be a strong fit with the particular client and his/her needs. Lower overheads may translate to lower fees. Scheduling flexibility. 	<ul style="list-style-type: none"> Less professional or administrative resources than a larger firm. Less of input and supervision by colleagues.

offers possible advantages and disadvantages that potential client organisations might like to consider in selecting their preferred supplier.

The best fit between a client organisation and the type of coaching supplier will depend on whether the executive coaching engagement is part of a broader organisational initiative or is a one-off intervention.

In considering suppliers ability to provide services around broader organizational initiatives, each of the different categories of supplier organisation in **Table 1** might also then be further categorised on their ability to offer services such as process facilitation, strategic consulting, leadership skills training, organisational consultation, psychotherapy, outplacement, etc.

It would be valuable to have more data on how often executive coaching is being utilised as a stand-alone process, and how often as part of a wider intervention. This might then be cross-referenced against the category of executive coaching supplier(s) involved to describe the range of ways in which executive coaching is being provided to organisations.

5.2 Business best practices

Having considered the context for the conversations about the business of executive coaching, we would now like to build on the work of ECS II that provided a framework of best practices in the business of executive coaching with six dimensions:

- Marketing (sales, referrals etc.)
- Contracting (pricing, structure, exit strategy etc.)
- Models (processes, interaction, practices etc.)
- Client learning and development (content, processes etc.)
- Measurements success
- Alliances and collaboration

The foundational work from ECS II was built on during ECSs III and IV. Below we show in summary format how each of these streams of conversation started at ECS II and have evolved, to varying degrees, since.

5.2.1 Best practices in marketing:

ECS II foundations:

- Creation of a marketing plan including definition of target markets, referral networks, lead generation and milestones.
- Accumulate evidence of experience of work at high levels in organisations (including references and testimonials) with identification of expertise in specific industries – some argue for this experience needing to be as an executive, others as a consultant and/or coach.
- Focus on direct referrals, word of mouth and brand marketing.
- Well-developed examples of the value of coaching, incorporating return on investment.
- Focus on long-term partnership relationships with clients – sufficient presence to fit both the boardroom and the golf course.

ECS III additions:

- Identification of complementary and related services which can be marketed with executive coaching or the effectiveness of which executive coaching would enhance (e.g. skills training, facilitation, strategic planning, 360 feedback, organisational change).
- Licensing of models and creation of other intellectual property resources yielding passive income streams (courses, tapes, books and e-books etc.)

ECS IV additions:

- Identification of links between individual work with executives and systemic work with the organisation as a whole, quoting panellist Mary-Beth O'Neill:
“I want coaches to be held accountable for more than the development of an individual but also positively impact the organization they lead.”
- Positioning the executive coach as a thought-leader who can guide his clients in identifying key information sources and exploring the interaction of multiple-dimensions such as business, economics, politics, international events and societal concerns (e.g. the environment and income inequalities).

- Leveraging relationships formed with clients from previous coaching or consulting work is considered the best way to identify new senior-level executive clients. These relationships can be called upon for referrals and references.
- Other successful practices for opening new relationships and attracting new business include making speeches and presentations, opening conversations with fellow travellers and social contacts and developing PR relationships with journalists and editors with influential publications.

5.2.2 Best practices in contracting:

ECS II foundations:

- Corporate executive coaching contracting more complex than for other types of coaching.
- May require signatures from various people holding the client responsible for getting results.
- Requires clauses on confidentiality and non-disclosure, as well as professional liability and general insurance coverage.
- Identify observable behaviours where change can be monitored, and specific expected business impact.
- Anticipate impact of expected changes on the wider organisation.

ECS III additions:

- Consider how different payment approaches impact the relationship, such as cash vs. options, in advance vs. later.
- Offering of money-back guarantees or warranties.
- Value pricing: based on measurable outcomes, and acknowledging work with different clients has different potential impact.

ECS IV additions:

- More on value-pricing
 - Work with leader behaviours, team behaviours and specific results.
 - More powerful if the client sets the success criteria to be measured.
 - Another option: fixed price plus bonuses when targets met.

5.2.3 Executive coach as model of leadership:

ECS II foundations:

- “Leader coaches” must have studied and practiced leadership.
- They know the importance of having a personal vision, leadership skills and replicable desirable behaviour.
- Operate as “thought-leaders”.
- Serve as strategic partner to the CEO and top team.
- Know their own critical success factors.
- Can see the big picture – understand organisational and global systems.

ECS III additions:

- Summit attendees made a pledge of stewardship to the field of executive coaching

5.2.4 Best practices in client learning and development:

ECS II foundations:

- Executives rarely have opportunities for formal learning - executive coaches can adopt a teacher role where helpful.
- Providing real-time learning around specific issues, roles clients play, defining and achieving results, developing specific competencies such as engaging in meaningful conversations.

ECS III additions:

- Coaching sessions last from 20 minutes to whole days.
- Coaching supports trend towards developing leaders holistically (taking the whole person into account).

ECS IV additions:

- Find and use behavioral characteristics that describe competencies related to leading with adaptability and in times of uncertainty

5.2.5 Best practices in measuring success:

ECS I and II foundations:

- Understanding measurements and putting them in place are critical to success.
- Tends to involve more assessment work than other types of coaching, allowing tracking of specific measures.
- Importance of measuring pre- and post- coaching work, and linking coaching initiatives to results.
- Dimensions of measurements include: organizational success, organizational climate, emotional intelligence (EQ), benchmark and milestones, baseline assessments and satisfaction (employee, executive and customer).

ECS IV additions:

- Consider three dimensions for assessing return on investment (ROI) – business results, team Behaviours and leader behaviours (as in 5.2.2)
- Require the client to look into the future and describe measurable and tangible results in each area
- When time to review results examine against internal and external factors, identifying to what proportion coaching was influential in achieving them (e.g. result \$1,000,000 gain in profit, cut in costs – client assesses that coaching contributed to 25% of the outcome). Use this kind of data in ROI calculations.

5.2.6 Best practices in collaboration:

ECS II foundations:

- ECS established to create a collaborative environment – key attractor for participants.
- Alliances important to facilitate provision of large contracts with coordinated objectives – organizations need teams of executive coaches capable of working with a consistent focus and methodology.
- Attractive for sharing intellectual property, promoting and growing the profession, identifying and developing resources and referrals, having shared values and ethics.

ECS III additions:

- Develop alliances through joint creation of business proposals
- Strategic teams of small executive coaching companies may offer a competitive edge over larger suppliers.
- Potential for ECS as a group to represent executive coaching at events and conferences.
- Internationalisation through ECSs in other regions (e.g. European ECS Italy, May 2003).

ECS IV additions:

- Interest in developing community of practice amongst ECS participants to share lessons, resources (books, articles, tools and technologies) and leadership models
- One-to-one alliances - recommendations:
 - Can require significant investment of time to develop mutual trust
 - Explore strengths of each partner and areas for development
 - Clarify roles, in the relationship and on assignments
 - Clarify ownership or client relationships and intellectual property
 - Working on projects together the best way to advance the alliance
 - Have freedom to work and not to work together on projects
 - Define clear entry and exit processes
- Group alliances
 - Multiply the synergistic possibilities and resources available within the alliance
 - More work involved in each member learning about others' strengths and weaknesses
 - Often a network leader or "point person" important for organising the group

The authors suggest that the ECS community build a manual of business best practices based on this developing body of knowledge and integrating the work of future groups. Such a resource would be valuable for present and future members of the community.

6 NECESSARY DIALOGUE: CHALLENGES AHEAD

This fourth Executive Coaching Summit was a breakthrough for the executive coaching community to the extent that an unprecedented number of executive coaches from six countries gathered together to share experience, knowledge and ideas. The open space structure employed led to a wide variety of conversations and relationship building, and produced many more questions than answers. There appears to be an increasing demand for a meeting which will hold its fifth annual event in Denver in November 2003, and which inspired the first European Executive Coaching Summit in Stresa, Italy in May 2003 (at which ten countries were represented).

In the opinion of these authors ECS IV will have been useful process for the executive coaching if some of the more important questions facing the community can be worked through to more tangible action at, and between, subsequent ECSs. We respectfully suggest the following priorities for such action, knowing that our choices might not match those of all ECS members - debating what the broader ECS community would like to see on this list is perhaps its first challenge.

Challenges for future ECS community work:

- A PURPOSE:** Clarify the Purpose, Vision and Mission of the annual Executive Coaching Summits – are ECSs primarily stand alone events focussed on networking and information sharing, or designed to move the field and practice of executive coaching towards some specific (renewable) goals over time? Having clarified the Purpose, Vision and Mission of the ECS, establish a leadership structure to support their advancement.
- B PROFESSION OR NOT?:** Establish a clear position as a community as to whether executive coaching is:
- (i) A distinct profession, or
 - (ii) A subset of the broader coaching profession or another profession such as psychology or management consulting, or
 - (iii) A powerful intervention, process and/or methodology used by a wide range of business professionals.
- C NEXT STEPS:** Following on from the question of “Profession or Not?” above
- (i) If executive coaching is a profession in its own right or the subset of another profession, identify which steps the community deems necessary to create an institutional home for it, whether as a new independent organisation or in partnership with an existing one.
 - (ii) If executive coaching is more an intervention, process and/or methodology identify the next steps that are desired by the community to enhance its effectiveness and promote best practice.
 - (iii) If the community is split between (i) and (ii), consider whether a parallel approach can be designed allowing dual positions to be sustained within the ECS community.
- D CREDENTIALS:** building on the pioneering work of ECS II, and the answers to Challenges B and C above, design the ECS’s vision for credentialing of executive coaches based on the specific needs of the field’s practitioners and clients.
- E SUPPLIERS OF EXECUTIVE COACHING:** map the categories of executive coaching suppliers, using this information to describe the different ways in which executive coaching is being applied and to attract a broader representation of each category to future ECSs
- F CONSOLIDATING LEARNING FROM ECSs:** develop a process for accumulating the knowledge emerging from ECS gatherings to speed-up familiarisation of new members on the previous work of the ECS – the more White Papers that are published the tougher it is to integrate the learning from each.
- G ACADEMIC RESEARCH:** create an agenda for research that the ECS community would like to see advanced, and is willing to participate in. Develop a strategy for advancing such work partnering with credible researchers.

7 THE LEGACY OF EXECUTIVE COACHING

During the Summit Dr. Jeanine Sandstrom (one of the organisers of the first ECS) asked delegates to reflect on the impact of their work, not just on the individuals that they coach, but also on the organisations that they lead, on their families and communities. This enquiry helped to present the scale of the impact of executive coaching – with the potential for thousands of people to be impacted by the work with just one leader in a large organisation, let alone the hundreds of thousands (if not more) touched by the work of all of the executive coaches around the world. It was inspiring and perhaps daunting for executive coaches as a community to face the scale of the impact that their work can have.

Executive coaches are dedicated to their clients success and fulfilment, supporting them in taking bolder steps as leaders and human beings. As they model leadership in their own lives executive coaches also make important direct contributions to society. Laura Whitworth, who pioneered the first ECS, exemplified this with her own growing work bringing coaching skills to prison inmates as a tool for supporting inmates in becoming contributing members of society and transforming prison culture – a moving project which she described in detail to the Summit⁶.

It is clear that executive coaching makes multi-faceted and important contribution to organisational success and society as a whole. In coming together as a community the ECS provides an important opportunity to multiply this contribution. With the first four Summits the ECS community has built a solid foundation - we hope that this paper serves to provide a platform for the next stage of development for the ECS.

Acknowledgements

ECS IV Organising Team:

Jane Creswell, Elizabeth Guilday, Mike Jay (Leader), Bob Johnson, David Martin, Suzi Pomerantz, Michael Sanson and David Utts. ICF Office: Kathy Schramek.

ECS IV Recorders:

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ECS IV Esteemed Participants:

Edmond Antoine, Manya Arond-Thomas, Pat Arruda, Jeffrey Auerbach, William Bergquist, Arline Berman, Sue Bethanis, Matt Beucler, John Boisvert, Marjan Bolmeijer, Rebecca Bradley, Brent Brower, Mary Wayne Bush, Wendy Capland, Juan Jose Colombo, Jane Creswell, Bryan Durocher, Vicki Escude, Susan Gatton, Suzanne Goebel, Steve Goldberg, Cheryl Gray, Laura Greig, Elizabeth Guilday, Linda Hall, Hardy Hasenfuss, Leslie Hilton, Annette Hurley, Mike Jay, Bob Johnson, Ken Kesslin, Patsi Krakoff, Gayle Lantz, John Lazar, Sylva Leduc, Suzanne Levy, Steve Lishansky, Russ Long, Sheila Maher, Diane Malnekoff, Christina Marshall, David Martin, Fran Massey, Daniel McNeill, Kathleen Mercker, Linda Miller, Meryl Moritz, Cork Motsett, Rob Mullins, Mary Beth O'Neill, Suzi Pomerantz, Marcia Reynolds, George Ritcheske, Cindy Roman, Kraig Rudinger, Wendy Sage-Hayward, Jeannine Sandstrom, Michael Sanson, Lee Smith, Susan Steinbrecher, Margie Summerscales Heiler, Johan Tandberg, Pete Walsh, Deb Weiler, Laura Whitworth, Eva Wong, Beverley Wright, Joan Wright, Daniel Yolleck, Linda Yort, Klaus Zepuntke.

Total participants: 71.

Gender mix:

Female 43 (61%)
Male 28 (39%).

Participants by country:

USA 65 (92%),
Canada 2 (2.8%),
China, Germany, Sweden, Switzerland 1 each (1.4% each).

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⁴ Letters to the Editor, Charles Pfeffer and C. B. "Cork" Motsett. Harvard Business Review, September 2002, 80(9), 120-121.

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⁶ The Bigger Game project - <http://www.thebiggergame.org>