EXECUTIVE Coaching SUMMIT VI

LEARN. NETWORK. CONTRIBUTE.

Executive Coaching Summit VI

Forging New Pathways: A Dialogue Between

Leaders and Executive Coaches

Executive Summary of ECS VI Proceedings

November 1-2, 2004

Quebec City, Canada

1. Introduction

The sixth international Executive Coaching Summit (ECS) was held November 1-2, 2004 in Quebec City, Canada. Seventy Executive Coaches representing North America, Europe, Africa, Australia, and Asia participated in the annual event building upon the momentum of previous Summits.

Event and Date	Location	Theme
ECS I: October 1999	Orlando, FL, USA	Defining and distinguishing executive coaching
ECS II: October 2000	Vancouver, BC, Canada	Business best practices, the future of executive coaching
ECS III: August 2001	Chicago, IL, USA	Community building; shared learning through case study, explored greater alignment with ICF
ECS IV: October 2002	Atlanta, GA, USA	Necessary Dialogue: Dilemmas in the Field and Client Perspectives
ECS V: October 2003	Denver, CO USA	Discovering new ways to serve: Leveraging Best Practices
ECS VI: November 2004	Quebec City, Quebec, Canada	Forging new pathways: A dialogue between leaders and executive coaches

This document is a compilation and summary of the authors' synthesis of the conversation at Summit VI and thus is a variation from previous years in which formal white papers were produced. In some cases, where notes from sections of the proceedings were limited, the authors' voice is more strongly represented with the intent to provide meaningful, ongoing dialogue within the executive coaching community.

The purpose of this Executive Summary is to provide a high-level recap of the key contributions and learnings generated by the ECS community at the sixth annual Executive Coaching Summit. This paper is structured into the following segments:

- 1. ECS VI Intent and Objectives
- 2. ECS V Project Team Report Out and Contributions
- 3. Client Perspective: Present Day Leadership Challenges
- 4. Five Effective Executive Coaching Practices
- 5. Summary of ECS VI Participant Feedback
- 6. Appendix

1. ECS VI Intent and Objectives

As a recognized forum for executive coaches across the globe, the Executive Coaching Summit is an annual think-tank of executive coaches who share their collective experience and insights to further advance the profession. The sixth annual Executive Coaching Summit, forged with three powerful intentions for its participants--- ***to Learn, to Network, to Contribute***--- provided the opportunity to explore how to advance executive coaching to assist clients in addressing present day leadership issues.

Specifically, the objectives of this year's Summit were to:

- Develop more *effective executive coaching solutions* to address our clients' most pressing leadership challenges
- Strengthen *how we deliver executive coaching* and serve our clients
- Continue to *build a strong community* of executive coaching colleagues
- *Include the client voice and perspective* in our 2-day conversation

The agenda for the session was as follows:

Day 1

- Welcome and Introduction
- Contributions and Learning: Summit V Teams
    - Diversity
    - Return on Investment
    - Executive Coaching Summit Transition Team
- Leadership Challenges: Improving Ways We Serve (What We Do)
    - Overview survey results
    - Utilizing EC to address Leadership Challenges

Day 2

- Top Priorities for Advancing Executive Coaching (How We Do Our Work)
    - Overview survey results
    - Strengthening EC processes – using world café methodology
- Summit VI Wrap-Up
    - Highlights
    - Evaluation
    - Passing the Baton

2. ECS V Project Team Report Out and Contributions

In order to provide continuity between each annual Summit, ECS VI started with a report out of the project teams that were formed in ECS V. The intent of ECS *V* (2003) was to transform the Executive Coaching Summit beyond an event into a community of practice. To achieve this end, there were several project teams formed to advance the community's contribution in three important aspects of Executive Coaching: Diversity, Return on Investment and the Executive Summit Transition Team. Each team presented a summary of the progress to date. Their contributions are summarized below.

The Diversity Team

At ECS VI it was clearly determined that executive coaches who coach leaders of global organizations need heightened awareness of diversity matters to help clients successfully navigate related issues, particularly if they have diversity blind spots. Key initiatives, including global teaming and succession planning may have limited success if our clients maintain short-sighted attitudes and beliefs about diversity.

The Diversity Team's objectives for ECS VI were as follows:

- To alter the "face" of the ECS attendees to be more diverse, and thus reflect the diversity of the organizations in which we coach.

- To start (and sustain) a dialogue that attunes us to the issues that our organizational clients must deal with successfully in order to lead in a multicultural workplace.

The Diversity team identified the following key issues to address:

- *Recognizing existing diversity*
  - Identifying both visible elements of diversity (i.e., race, gender)
  - Also recognizing less visible elements of diversity (i.e., cultural beliefs, thinking styles, sexuality, religious beliefs, and the like)
- *Working with diversity*
  - Helping coaching clients and organizations recognize, respect and consider the multiplicity of perspectives and values that exist within all complex human systems
  - Understanding the strong emotions and inherent resistance to truly embracing diversity
  - Undertaking self-development to be more open and aware of how diversity issues impact performance in organizations
  - Learning to highlight and work through diversity related challenges
- *Embracing diversity as coaches*
  - Seeing the world through a global (rather than regional/national) lens
  - Recognizing that the current composition of the ECS community, particularly in North America, may not be truly reflective of the diversity we are seeing in our client organizations
  - Developing enough personal presence to stand in the center of the storm as diversity discussions get emotionally charged
- *Making the transition in the ECS Summit from diversity to inclusion*
  - How do we make sure we are inviting all the necessary and appropriate people to any gathering?
  - How do we effectively increase the diversity of summit participants?
  - How do we move from fear toward inclusion and celebration of the richness of our differences?

The team developed an extensive Intercultural Awareness and Diversity Resource Guide that included diversity exercises, articles and a bibliography. Team members facilitated an exercise to trigger participants to explore their attitudes and beliefs and to expand their view of diversity beyond ethnicity and gender to include geographic, generational, sexual orientation and philosophical/religious dimensions.

<u>Key Contributions:</u>

- Diversity is about ***all*** views and is a global perspective (not specific to North America)
- Diversity is about the uniqueness that we each bring and how that impacts how we do business/how we coach
- There are two prevalent views of diversity: 1) U.S. centered view that focused on race, gender and, 2) The more encompassing, global view that it is much larger than race, gender, and other "surface" characteristics.
- In the corporate culture we work with people who *look like* they are part of the same culture, but we need to be cognizant of the diversity that exists within individuals
- Language is a key to one's culture and we can look to the language and the usage of words/references/metaphors for greater understanding

The Return on Investment (ROI) Team

Although executive coaching clients are expecting coaches to provide a measure of the success and value of coaching, less than half of the ECS VI participants are actually "doing ROI" in their coaching work. Results from a client survey conducted by the ROI Team indicates that among the most frequently mentioned ways executive coaches can increase the value of coaching in organizations is *to measure progress* and e*stablish clear outcomes.* Specific respondent comments include: "demonstrate examples of ROI. This is still a soft skill service and tough to prove the positive results." "Tighten up the front end objectives and come up with ways of measuring success."

When Summit participants were asked what percent of the time they apply ROI measures in their coaching work, the majority said 0-25%. The reasons include the lack of certainty around the process of how to measure ROI.

<u>Key Contributions:</u>

- Research indicates it is important for the executive coach to be cognizant of ROI measurements and important for the client to know and articulate the real impact of the executive coaching program and why they would re-engage the coach and/or an executive coaching program. Further, it is widely recognized that establishing ROI with our clients is considered a fundamental aspect of our coaching service. It is important for the credibility of our profession for executive coaches to speak to, to know, and to factually represent and market the value of coaching services. In addition, our clients are looking to us to "solve" and handle this on their behalf given we are the professional experts.

- At the most basic level, there are three common ways to measure the impact of coaching:
    - Pre and post coaching differentials in:
        - Bottom line business results
        - The leader's behavior directly related to achieving those results
        - The team's behavior

- There are three fundamental calculations for ROI (a handout was provided to participants with examples of how to calculate ROI using these methods).

        - Benefit-to-Cost Ratio (BCR). BCR is the traditional calculation
        - Return on Investment (Jack and Patricia Phillips)
        - Benefit-to-Cost Ratio (BCR) Accounting for Other Variables (Mary Beth O'Neil)

- Establishing an ROI objective in our coaching initiatives brings clarity around the client's and organization's expectations from the start and provides a means to monitor progress throughout the process. There is significant value in requiring our clients to fully outline their performance now (pre-coaching) and where they want to be (post-coaching), in both tangible (i.e. financial results, retention) and intangible (i.e. employee morale, engagement) areas.

The Executive Summit Transition Team

The Executive Coaching Transition Team originated at last year's Summit when two core questions were raised: What is missing in executive coaching today? How can we do more to impact leadership? Over the past year, an 8-member Steering Committee conducted several conference calls, the outgrowth of which was the launch of a new organization, the International Consortium for Coaching in Organizations (ICCO). The ICCO is a not-for-profit organization that is results-oriented, client-focused, research and scholarship-based for the broader coaching community and its stakeholders and constituents.

Key Contributions:

- Clarity of purpose - The International Consortium for Coaching in Organizations (ICCO) has the following purpose statement:

The ICCO is a diverse community
-- coaches, organizations, academic institutions, associations, and users of coaching services –
that develops, advances, and promotes organizational coaching and provides a forum to:

1) Connect to an engaged, global network
2) Share knowledge through publications and events, and
3) Conduct cutting-edge research

- Key objectives for ICCO include:
    - Setting standards and best practices for organizational coaching that are open, evolving and spiral upwards (improve upon year to year) in order to remain valuable to our clients.
    - Ensuring our profession maintains the highest level of professional ethics consistently across the globe.
    - Seeking grants to provide funding for global meetings to answer the question emerging leadership issues

- Organizational framework - The ICCO elected its first Board of Directors in January 2005 and include the following members:

Board of Directors
Chair: Agnes Mura (Agnes also represents and serves as Liaison to the Board of the Professional Coaches and Mentors Association).
Vice Chair: Suzi Pomerantz (COO and Communications)
Treasurer: Linda Finkle (CFO role. Linda also represents and serves as Liaison to the Board of the International Coach Federation.)
Secretariat, Internal: Bill Bergquist (Programming, Research)
Secretariat, External: Bob Johnson (ICCO Annual Forum)

In addition, ICCO currently has several operating committees working to establish a solid infrastructure for the new organization. These committees include governance, marketing, membership, research, and portfolios.

- The ICCO website is: www.coachingconsortium.org

- The first ICCO Forum is slated for Spring 2006.

3. Client Perspective: Present Day Leadership Challenges

As there was significant emphasis on integrating the client's perspective as much as possible into ECS VI dialogue, the planning team developed and administered a Leadership Survey to more precisely understand our clients' leadership issues and challenges and to help focus the conversation at the Summit. Feedback generated by the client Leadership Survey served as the catalyst for extensive discussion around several specific areas of executive coaching improvement and opportunity.

The survey, distributed to clients of summit participants in October 2004, was a 26-item instrument that focused on securing data related to key leadership challenges and issues, and the benefits and challenges of executive coaching. Forty-eight executive coaching clients responded to the survey. Eighty-six percent of the respondents were from North America and represented a variety of industries. Over 50% of the respondents functioned as the Chief Executive Officer (or equivalent) of their organization. The key results of the survey are included in the appendix; however, identified below are two key areas of the results which were heavily utilized at the Summit in the development of effective executive coaching practices.

Input 1: Critical Issues, Concerns and Challenges

The results of question 12 of the survey were utilized for structuring the input and discussion at the Summit during Day 1. The question asked clients to "identify the three most critical issues, concerns, or challenges they currently face as a <u>leader</u>". The top eight responses in the survey results included:

1. Developing leadership capacity (37%)
2. Setting strategic direction (35%)
3. Managing work/life balance (33%)
4. Attaining strategic objectives (31%)
5. Dealing with conflict (20%)
6. Harnessing employee productivity (20%)
7. Clarity of roles and responsibilities (20%)
8. Measuring performance (18%)

Input 2: Increasing the Value of Executive Coaching

Another key component of the Summit was focused on identifying ways to increase the ***value*** of executive coaching services and to improve ***how*** we deliver executive coaching services. The results of the following question were utilized to focus the conversation at the Summit on Day 2 and also contributed to the generation of effective practices. The question asked clients "How could your coach increase the value of coaching to you and your organization? (prioritize top three areas)". The top seven responses in the survey results included:

1. Sharing leadership best practices (63%)
2. Affordability + providing coaching to more people (50%)
3. Measuring progress and establishing clear outcomes (38%)
4. Sustaining a coaching culture (38%)
5. Introducing new ideas for development (33%)
6. Using 360 Tools (29%)
7. Shadowing (23%)

4. Five Effective Executive Coaching Practices

One of the outcomes expected from ECS VI was to identify best practices within executive coaching that were currently in use by professionals in the field. Our expectation was that the conversation would elicit practices the participants assessed as grounded, effective methods of working with clients that achieved results. The world café format --- tables by topic, informal conversation, meaningful questions and discovery--- was used to identify and document these practices at the ECS VI summit.

Effective Practices: Choice of Terminology

After some deliberation, we chose to call these practices 'effective practices' rather than 'best practices' for the following reasons. Best practices are defined as methods or tools that have proven to be successful in particular circumstances. They identify a process for how to do something to achieve a successful result in different situations and contexts. Best practices have several key characteristics: they reliably lead to a successful result, they have a sustainable effect, and they have the potential to be replicated by others. Currently, the field of executive coaching does not have sound, grounded research in best practices. The lack of identified best practices is likely due to the fact the field is relatively new. Research initiatives are underway and in various stages to rectify this gap. However, today there are not generally accepted, well-researched best practices for the field of executive coaching; and although, the term best practices was utilized during the ECS VI, we propose to use the term 'effective practices' for the purposes of this paper and until such time that we can formally declare best practices for our profession.

By documenting the methodologies our community considers to be effective practices for executive coaching, the intent is to pave the way for conducting further research to establish 'best practices' for the profession of executive coaching. Based on the results of the working groups and world café discussions from Day 1 and Day 2, the following effective practices for executive coaching emerged:

Effective Practice 1: Using multi-rater instruments and other reliable, valid assessment tools

Although some participants view multi-rater (e.g., 360 degree) feedback as "a waste of time" and the administration of the instrument too cumbersome, research indicates clients believe multi-rater assessments and other types of instruments are an important element of effective executive coaching and an important value-add contribution of coaches.

Many coaches utilize a multi-rater feedback tool and/or other types of instruments in their executive coaching practices. The data from these instruments assists the coach to more fully understand the context in which the client is operating. Without it, the coach relies heavily on the client's perceptions of their environment as well as their impact on this environment. These perceptions may or may not be consistent with others' perceptions. If a coach uses no external data from interviews or assessment instruments then coaching becomes limited to the perspectives of the coach and coaching client. When a coach utilizes external data, the coaching conversation is enriched with additional perspectives and information to use within coaching.

The value of using assessments are multi-faceted, namely, the feedback uncovers blind spots, creates a benchmark for client progress, and often gets client's attention to take action. In addition, the results sometime uncover "the elephant in the room" that may be holding a client back in their career and provides baseline for clients to move toward success.

Numerous purveyors of multi-rater instruments and assessments were discussed at the Summit. We offer a simple categorization for these tools to assist in understanding what value they impart on the coaching process. This list merely provides an inventory of possible instruments as no agreement was reached on the relative quality and usability of results offered from each tool.

A. Personality instruments measure a person's natural competence or style. This type of data is useful for an executive to develop a greater awareness of his natural leadership style and the impact this style has on others – particularly those with an opposite style. In addition, this type of instrument is useful in understanding others and how to more effectively connect with others. Common tools used within executive coaching practices and that are generally accepted as reliable, valid instruments include the following:

- The Birkman Method
- DISC
- Insights Discovery
- Leadership Circle Profile
- Myer's Briggs Type Indicator
- Predictive Index

B. Performance instruments measure a person's capacity or competence in one or more specific domains related to effective leadership. Often performance instruments are standardized meaning they have been researched and tested on various populations and settings and offer reliable and valid data. Performance instruments are useful for measuring client progress (e.g., pre and post coaching intervention). Common performance instruments used within executive coaching practices include the following:

- Emotional Competence Inventory
- Emotional Intelligence Inventory (EQ-i)
- Leadership Practices Inventory
- Panoramic
- Platinum Rule
- Talent Smart
- Various 360° Instruments
    - B\Coach Systems Organizational 360°
    - Center for Creative Leadership 360°
    - Clark Wilson 360°
    - INSIGHT Mirror 360°
    - 2020 Gold
    - Others

C. Interviews are also an excellent way of gathering useful information about a client's style and impact in the workplace. Interviews are typically conducted with the coaching client's manager, peers, direct reports, clients, suppliers, and/or board of directors, depending upon size of organization. The interviews typically take 30 minutes to 1 hour in duration. The information is summarized and presented to the coaching client and informs the coaching goals and objectives.

Multi-Rater Methodology

A standard process for utilizing multi-rater instruments, interviews and other assessment tools is as follows:

- Identify the tools and methods that are most useful to assist in the specific coaching engagement. Discuss the advantages and disadvantages of each assessment tool and process.
- Reach agreement with the client on which tools and methods will be most useful to provide feedback relative to the coaching client's goals.
- Review and discuss a confidentiality agreement indicating how the data will be summarized (e.g., no attribution to person or organization level such as peers).

- If an interview process will be used, the client needs to identify the respondents who will participate in the interview. A random selection of the client's boss, peers, direct reports, and another 3rd party is a useful starting point.
- Agree on questions to utilize in the interview process. The coaching client and coach often discuss the questions and redesign them as necessary. A useful set of questions to start with include the following:
    - *What is it like to work with (client name)?*
    - *What are (client name) strengths?*
    - *What, if anything, does the (client name) do that hinders his effectiveness?*
    - *(Client name) would have more impact if he/she:*
    - *What suggestions for improvement or doing things differently would you offer (client name)?*
    - *How is (client name) organizational unit (e.g., division) working in general?*
    - *What leadership capacity needs to be further developed by (client name)?*
    - *What has been the biggest impact (client name) has had on the organization in the past 12 months?*
    - *What has been the most significant contribution made by (client name)?*
- Conduct interviews and complete assessment instruments. Typically a notice is sent by email to the participants from the coaching client explaining the purpose of the interview or multi-rater assessment. Respondents must be notified of the confidentiality limits of their feedback as well as what will be done with the information once completed. In addition, the interview questions should be included in this notice if one-on-one meetings will be held as part of the process.
- Develop summary report. At a high level, the report typically documents the following areas depending on the focus of the questions: strengths, areas of learning and development, specific recommendations.
- Present summary report to coaching client and discuss results. Identify key areas for coaching relative to the coaching client's goals.

Key Considerations

Depending on the context and organizational climate, one or more of the following may important considerations when utilizing multi-rater instruments and tools within the coaching process.

- The executive coach has an important responsibility in ***properly framing the intent, value, and results*** of the process and tools. In addition, the coach must understand the different criteria for using various instruments so that selection of the tools is congruent with the coaching goals.
- The ***art of delivering feedback*** is highly important with respect to how well the feedback is received. Some tips on delivering feedback include the following:
    - Ensure the client understands the instrument and its limitations
    - Frame the context as a learning opportunity
    - Provide the report to the coaching client only; others from the organization are not privy to the results unless it is agreed upon at the outset of the process
    - Ensure there is a plan in place for moving forward
    - Understand that if the feedback is from an instrument – instruments are not perfect analyzers of complex human nature
- ***Utilize instruments that are reliable and valid*** and measure key areas relevant to the client's goals.

- ***Do not focus solely on areas of development and learning***. It is important to highlight the client's strengths and leverage these strengths in the learning process.

Effective Practice 2: *Shadowing*

Shadowing is a live, reflective, and contracted intervention. The process involves observing a client's actions and interactions for a given length of time in a natural work setting such as executive team meetings, management activities, presentations, telephone conversations and the like. Videotaping may also be a useful medium for shadowing. The types of shadowing differ based on the level of participation of the coach. Three examples of shadowing with varying degrees of participation include:

- *Silent shadowing* – coach is in the room as an observer only
- *Declared shadowing* – coach is declared an observer in the room
- *Participatory shadowing* – coach is declared and provides real time feedback in the moment during the event

Shadowing serves two purposes: 1) to provide external data to the coach and coaching client which is intended to enhance the coaching conversation; and 2) to provide feedback the client regarding his/her leadership presence and impact. This feedback serves to increase the executive's self-awareness.

Depending on the type of shadowing utilized, the coach provides feedback to the executive during the session, at the end the session, or at the next coaching conversation. This feedback is typically delivered verbally; however, it is also useful to document the coach's observation and provide it in written form to support the discussion and learning. Using the observations and reflections from the shadowing provides excellent input into a development plan for the executive.

Types of information provided to the client are based on the perceptions and reflections of the coach's observations during the shadowing process. For example, feedback includes comments on language (i.e., actual choice of words) and mood, facial and body language, tone of voice, interactions and reactions from others, and style. In addition, shadowing provides opportunity to discuss alternate ways of handling issues and challenges that occurred in the context of the work setting. This feedback allows the executive to directly compare their identified objectives with actual leadership behavior in the workplace. Clients then have the ability to take new actions from increased self-awareness and understanding.

Key Considerations

Depending on the context and organizational climate, one or more of the following may be important considerations when utilizing shadowing as a tool within the coaching process.

- ***Clarity of purpose*** – It is important to ensure there is a clear understanding between the coach and coaching client as to the purpose, goals, process and expected outcomes of shadowing.
- ***Provide context to others in the setting*** –The coaching client and/or coach may need to provide an explanation as to why the coach is attending the meeting or session. This explanation eliminates any potential misunderstandings or misperceptions which may arise about the presence of the coach.
- ***Remain part of the background*** – The coach typically does not participate in the work setting activities s/he is shadowing unless there is agreement to intervene in some manner within the shadowing session. The coach must self-manage key aspects of their body language such as facial expressions and other non-verbal responses to the actions and language of the coaching client during this time.
- ***Maintain confidentiality*** – If the shadowing process involves real-time intervention, it is important for the coach to maintain important confidences regarding the coaching client. For example, the coach is privy to key information about the coaching client including his/her perceptions, style, intention, strengths,

weaknesses and the like. It is important that this information is neither implicitly nor explicitly shared when others are present.

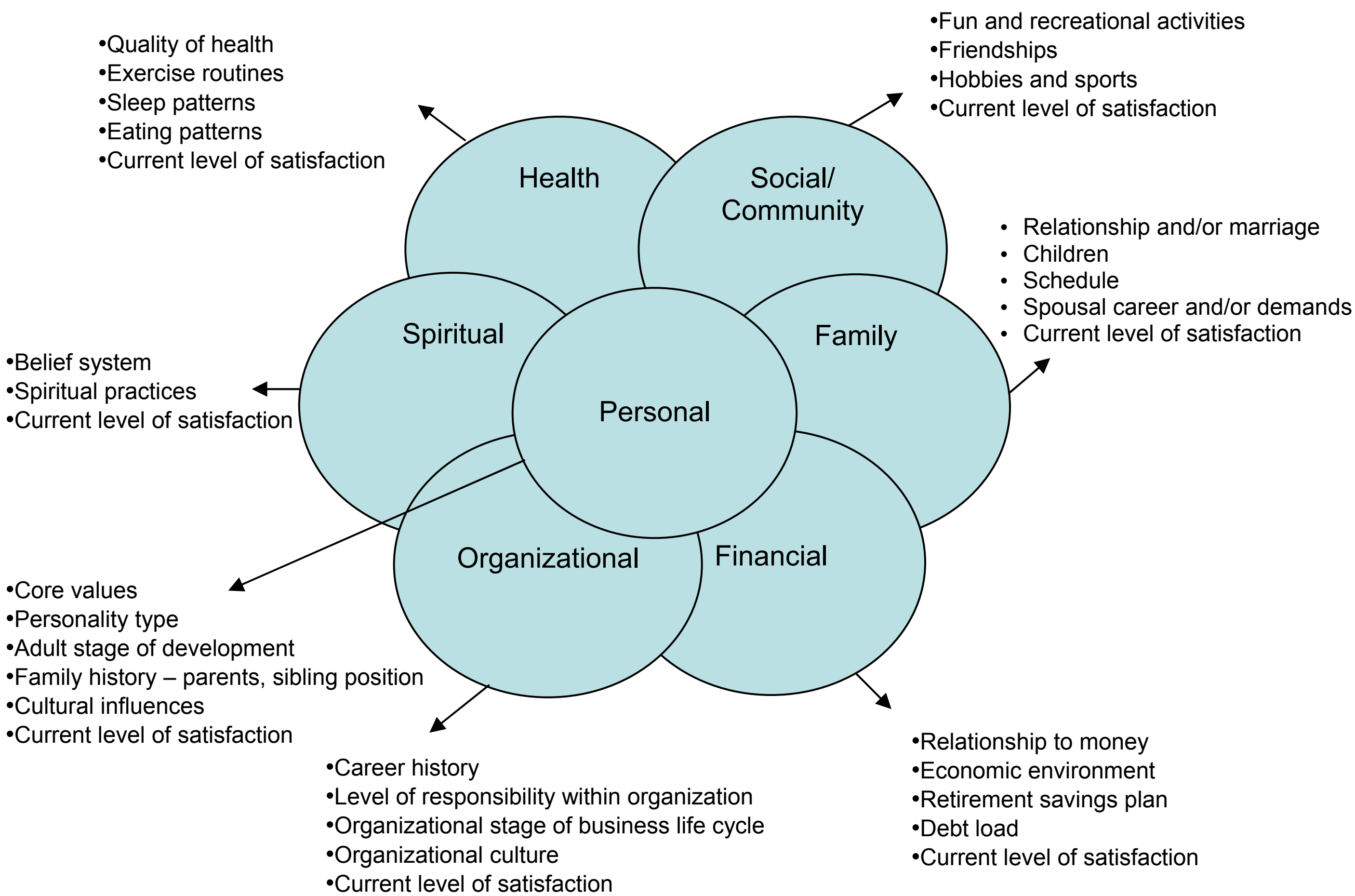
Effective Practice 3: Achieving Work/Life Balance

Work-Life balance is an issue commonly identified by many North American executives. However, it is important to note that each person individually assigns meaning to the term work-life balance and what it represents for them. There is no perfect, one-size fits all balance which one should be striving for. The meaning of work-life balance varies because each person assigns different priorities based on the context in which they live and operate. At the core of effective work-life balance are two key concepts namely: accomplishment and satisfaction. These concepts are two sides of the same coin. Accomplishment is a core driver for human beings. Most people have a basic need to contribute to the world in some fashion – be it on a large or small scale. This contribution provides people with a sense of achievement or accomplishment.

Satisfaction is one's ability to feel content with one's life and enjoy oneself and others. The contributions people make help individuals feel satisfied and pleased. However, contribution is not sufficient to realize complete satisfaction in one's life. It is also important to achieve satisfaction through a variety of means based on what an individual finds fulfilling.

We propose the following practice to assist coaching clients to better define the meaning of work-life balance given their particular circumstances and needs. Identified below is a 5-step process synthesizing the conversation at the Summit.

- **Step 1:** The first step is to ***assess and understand the client's life context***. Our assessment is that work-life balance stems from understanding the person's context from 7 key domains: personal, health, family, organizational, social/community, financial and spiritual. A model which explores the client's context in these domains is as follows:



- ***Step 2: Design purposeful living*** – this stage of the process involves understanding the client's frame of reference with respect to what work-life balance means for the individual.
    - What does work-life balance (integrated purposeful living) look like for the client within the context in which they live at this time?
    - In what domains does the client seek something different?
    - What are the underlying assumptions in his/her vision or desired state?
    - What does the client need to say 'Yes' to and 'No' to?
    - What are the 'shoulds' that the client is operating on?

- ***Step 3: Explore commitment level*** - this stage involves exploring how willing the client is to take action. The client may be willing to take action in some areas and not in others. It is important to understand where the client is committed and what is holding them back from achieving a balance.
    - What is the commitment level the client feels to work-life balance?
    - In what areas does the client feel committed to taking action?
    - What is holding them back from taking action?

- ***Step 4: Create an action plan for moving forward –*** this stage involves designing specific actions that the client will take to live a more balanced life.
    - What will the client do and by when?
    - What conversations are required and with whom to move forward?
    - What will get in his/her way?
    - How will you celebrate success?
    - What support does he/she need?

- ***Step 5: Follow-up –*** During the follow-up stage, it is important to support the client in assessing their progress, the roadblocks to success, and next steps. This is also a time to celebrate success!
    - Where is there alignment in what they say versus what they do?
    - What is getting in their way?
    - Where have they had success?
    - What do they want more of?

It may be useful to consider the terminology we and our clients use with respect to the concept of work-life balance. The term 'Work-Life Balance' may suggest that work is a separate and distinct element from life. In fact, 'work' is a key part of many people's life. It is one path to accomplishment and achievement as identified earlier.

It may be useful to use terminology that depicts a more holistic frame from which to view balance. One proposal is to use the term "integrated living" or "purposeful living". These terms provide a platform for defining work as a part of living within our current cultural context. However, it is important to note that these terms may seem like jargon to some. It is recommended that the coach utilize or introduce terminology that is understandable and meaningful to the client.

Effective Practice 4: Phases of Executive Coaching

Executive Coaching focuses on strengthening leadership and improving business results in an organizational context. As such, Executive Coaching is distinct from personal or life coaching in that it typically requires a quantifiable measure of results. Organizations may request and expect to see feedback and evidence of the executive's change in behavior and the impact of those improvements on actual business results.

Executive Coaching is comprised of a series of structured, one-on-one interactions between a coach and an executive, aimed at enhancing the executive's performance both personally and within the organization. Executive Coaching, perhaps unlike other forms of coaching, requires a *formal* documented process to determine the need, scope and expectations for each leadership development initiative. One such process includes five key phases of executive coaching. Each phase consists of several activities. These phases and activities are briefly described below.

Phase I: Contracting

Phase I of executive coaching is focused on clarifying expectations and developing a mutual understanding of the process. Typically, the meeting includes the coach and executive. Depending on the organization, the human resource executive may also attend the meeting. Often the organization requires a proposal outlining the process, costs, and timeline for executive coaching. The objectives of this phase include:

- Clarifying process, roles and responsibilities
- Clarifying expectations of the coaching client and organization
- Identifying limitations of confidentiality
- Determining expected outcomes
- Planning for measurement and evaluation
- Assessing fit between the coaching client and coach
- Identifying the timeline for coaching
- Confirming fee structure

Phase II: Profiling the Leader's Context

The next stage of the process includes developing a profile of the leader and the organizational context in which s/he operates. This stage typically involves interviewing and conducting assessments of the individual's style, strengths, and areas for development and summarizing this data for use in the coaching conversation. The objectives of this phase include:

- Clarifying the purpose and process of profiling
- Selecting the appropriate profiling tools and methods
- Choosing respondents
- Designing the questionnaire for interviewing
- Conducting interviews and assessments
- Compiling, analyzing and summarizing results

Phase III: Setting Goals

The next stage in executive coaching is to meet with the coaching client and establish clear goals. This process includes reviewing the results of the profiling process and clearly defining the goals of coaching. Goals are established based on the executive's leadership vision. These goals are intended to provide a guidepost for the coaching process. In addition to developing goals for the coaching client, this phase also includes a discussion of how the coach and coaching client plan to work together – i.e., their operating principles. The objectives of this phase of the process include:

- Confirming interests and needs of organization and client
- Refining key goals for coaching – what the client hopes to accomplishment within the given timeline
- Identifying measure of success – how will we know they have been achieved
- Documenting goals and measurements
- Developing operating principles for the coaching relationship

Phase IV: Coaching the Client

This phase of executive coaching consists of conducting confidential, one-on-one coaching conversations with the executive. The coach and coaching client engage in direct and personal conversations aimed at an overall objective of increasing leadership competency. The coaching client is often expected to complete activities outside the coaching sessions. These assignments may include reading, personal development activities, and/or leadership development activities.

Periodically, the coach and client evaluate the coaching process and experience. The evaluation includes assessing progress on goals, determining general learning and behavioral shifts in the client as leader, reviewing the coaching alliance and measuring the impact of coaching on business results. An agreement is reached at this time on next steps for the remaining timeline including shifts in the relationship or process.

Phase V: Bringing Coaching to Conclusion

The final phase of the executive coaching is conclusion. The purpose of this stage of the process is to highlight key areas of learning and accomplishments, acknowledge the relationship and process, and develop a plan for continuing to move forward. This stage may consist of conducting a final round of interviewing and/or assessments which can assist to highlight key shifts for the leader. The objectives for this phase of executive coaching may include:

- Identifying the ending at the completion of goals or when necessary/appropriate
- Completing assessments and/or interviews and summarizing results if appropriate
- Identifying key learnings, leadership behavior shifts and business impact
- Developing a plan for next steps – such as how to keep the learning alive
- Creating a memento or symbolic representation of the learning, relationship or key components of the process
- Acknowledging and celebrating the accomplishments and relationships
- Ceremoniously concluding the coaching relationship

Effective Practice 5: Sustaining Coaching Culture

Summit VI participants also furthered the conversation about how to sustain a coaching culture. This topic was one of the most important ways surveyed clients said coaches could create more value in their organizations. Although an effective practice for Sustaining a Coaching Culture was not established, the topic certainly presents a significant opportunity for future Summits.

In developing a best practice, an initial step may be to formalize a common definition of "coaching culture". The term "coaching culture" is used frequently by coaches, HR practitioners and client organizations and often implies different meanings and contexts. For example, is a coaching culture the end or the means? A declared definition, agreed upon by Summit membership, could be the base for a Best Practice for Sustaining a Coaching Culture. Other elements could include:

- ➢ What are the key components of a coaching culture?
- ➢ Why develop a coaching culture?
- ➢ Where does an organization start in developing a coaching culture?
- ➢ How does an organization sustain a coaching culture?

5. Summary of ECS VI Participant Feedback

Thirty-eight or nearly 50% of the attendees provided evaluation feedback about the Summit VI experience. In assessing the overall quality of the Summit, the average score was 4.25 on a 1= dissatisfied, 5= very satisfied scale. In addition, 95% of the participants reported that the Summit met their expectations. They plan to return next year and would recommend the Summit to others. Summit participants assessed the networking and dialogue portions of the event consistently high—from satisfied to very satisfied.

Areas for improvement included moving the informal brainstorming and world café format to the next level in order to generate specific conclusions, outcomes, and best practices for the Executive Coaching community. "Conversations without tangible outcomes" and "Breadth without depth; tactics without substance" were cited as significant opportunities for improvement for future Summits.

Participants submitted several topic suggestions to improve the content and proceedings of future Summits, including:

- Case studies, demo's, deeper sharing share best practices
- More master sessions; have in-depth presentations by exemplary members
- More strategies presented by top practitioners open to Q&A
- Raise the bar on challenging participants' potential
- Address new directions in executive coaching; more cutting edge
- Share specific coaching models we use
- Focus on how the marketplace is driving change
- More on methods and practical tools
- Present doctoral level research on Coaching

6. Appendix

ECS VI Client Leadership Survey Results

The survey, distributed to clients of summit participants in October 2004, was a 26-item instrument that focused on securing data related to client demographics, key leadership challenges and issues; and the benefits and challenges of executive coaching. The survey results follow.

Demographics

48 respondents
Variety of industries represented
86% North America
Annual revenues very polarized—either < $200 M or > $750M
Over 50% of respondents responsible for entire organization.

How satisfied are you with the results you are getting as a leader?

Very satisfied (17%).
Satisfied (67%)
Somewhat dissatisfied (16%)

How satisfied are you with the results you are getting from your direct report team?

Very Satisfied (13%)
Satisfied (65%)
Somewhat dissatisfied (21%)

Identify the three most critical issues, concerns, or challenges you currently face as a <u>leader</u>

1. Developing leadership capacity (37%)
2. Setting strategic direction (35%)
3. Managing work/life balance (33%)
4. Attaining strategic objectives (31%)
5. Dealing with conflict (20%)
6. Harnessing employee productivity (20%)
7. Clarity of roles and responsibilities (20%)
8. Measuring performance (18%)

Please identify the most important resources and tools that you rely on to support you in these challenges (pick first, second or third)

1. Executive Coaching (65%)
2. Executive Team Discussion (59%)
3. Internal resources (43%)
4. Literature (37%)
5. Leadership courses (27%)

How satisfied are you with the executive coaching services you have received?

- Very satisfied (48%)
- Satisfied (46%)
- Somewhat dissatisfied (6%)

What level of impact has executive coaching had in the following areas of your leadership and organization? (scale 1 to 4; 1 = no impact 2=moderate impact; 3= considerable impact; 4=signficant)

Considerable to significant impact

- Leadership productivity (79%)
- Personal satisfaction and productivity (75%)
- Clarity of roles and responsibility (70%)

No impact

- Obtaining financial results (35%)
- Effective interaction with board (31%)
- Succession Planning (30%)

How could your coach increase the value of coaching to you and your organization?

1. Share leadership best practices (63%)
2. Measuring progress (38%)
3. Sustaining a coaching culture (38%)
4. Establishing clear outcomes (33%)
5. Intro new ideas for development (33%)
6. Using 360 tools (29%)
7. Providing coaching to more people (29%)
8. Shadowing (23%)
9. Affordability (21%)

Acknowledgements

On behalf of all of the participants at the Summit, we would like to thank the following individuals for their special contribution to the Executive Coaching Summit VI:

ECS VI Planning Team

The planning team for ECS VI are listed in alphabetical order below. This group met in person twice (Clearwater, Florida and Vancouver, British Columbia) and held monthly teleconferences to put together the agenda for the Summit:

John Boisvert
Wendy Capland
Carolyn Davis
Laura Greig
Elizabeth Guilday
Shary Hauer
Bob Johnson
Suzi Pomerantz
Wendy Sage-Hayward
Pete Walsh
Beverley Wright

ECS VI Recorders

The following individuals dedicated their time and energy to participate in the Summit as recorders providing a written transcript of the event:

Lynda Aurora
Susanne Biro
Wayne Caskey
Jill Davis
Annette Hurley

ECS VI Administrative Support

The following individuals provided outstanding administrative support services during the planning and execution activities of the Summit.

Carrie Polley
Lisa Oliva
Lorrie Blanchard

Special Acknowledgements

The Summit VI identity and logo were designed by *Nancy Hauer*, Hauer Design, Seattle, WA; Hauerdesign.net

Sylva Leduc graciously formatted the client leadership survey into a tool called Zoomerang to enable efficient distribution of the surveys to clients and easy data collection and analysis.

ICF provided support to the ECS VI through donation of the meeting rooms and support

Discovering New Ways to Serve: Leveraging Best Practices

Executive Coaching Summit VI

Participant List

Last name	First name	State/Province/ Region
Allen	Ed	VA
Arnoudse	Don	MA
Auerbach	Jeff	CA
Aurora	Lynda	Hong Kong
Bergquist	Bill	ME
Bethanis	Susan	CA
Beucler	Matt	CA
Beuses	Marilena	FL
Biro	Susanne	BC
Boisvert	John	MA
Bush	Mary Wayne	CA
Capland	Wendy	MA
Cappellino	Mark	TN
Caskey	Wayne	MD
Clarke	Michael	South Africa
Conlinn	Carollyne	BC
Creswell	Jane	NC
Davis	Carolyn	CA
Davis	Jill	VA
Durrell	Marlene	ON
Glaser	Judith	NY
Goldberg	Steve	FL/BC
Greig	Laura	BC
Guilday	Elizabeth	NY
Hauer	Shary	FL
Hurley	Annette	VA
Jay	Mike	NE
Johnson	Bob	AB
Kesslin	Ken	CO
Kleitz	Lisa	MA
Kovacs	Sandor	CA
Krakoff	Patsi	Mexico
Kumata	Ellen	MA
Langille	Christine	ON
Lazar	John	IL
Leduc	Sylva	WA

Last name	First name	State/Province/ Region
Lee	Wanda	CA
Levy	Suzanne	NY
Lishansky	Steve	MA
Long	Russ	SC
Malnekoff	Diane	CA
McDougall	Christine	Australia
Mercker	Kathleen	GA
Miller	Linda	AZ
Mitchell	John	IL
Moritz	Meryl	NY
Motsett	Cork	FL
Mura	Agnes	CA
Niemela	Cynder	CA
Oberli	Stephan	Switzerland
O'Neill	Mary Beth	WA
Pomerantz	Suzi	MD
Rothaizer	Joel	AB
Sage-Hayward	Wendy	BC
Sanson	Michael	Switzerland
Sandstrom	Jeannine	TX
Sloan	Karlin	NY
Smith	Lee	WA
Smith	Sara	TX
Thompson	Gregg	OH
Valdiseri	Susan	IL
Walsh	Pete	AZ
Ward	Jeffrey	DC
White	Pat	TN